

20th Anniversary

# Senior Housing Cooperative Conference

*Together Again: Looking Forward*



May 31-June 1,  
2023



**DoubleTree Bloomington-Minneapolis South**  
7800 Normandale Boulevard  
Minneapolis, Minnesota

PRESENTED BY

**CDS** | Cooperative  
Development **Services**  
*Where cooperation is at work, communities prosper.*

**SCF**  
SENIOR COOPERATIVE FOUNDATION

<b>7:30-8:30 am</b>	<b>Registration, Continental Breakfast, and Networking</b>
<b>8:30-8:45 am</b>	<b>Welcome and Conference Overview</b> Kevin Edberg, Executive Director, Cooperative Development Services Tom Davis, Chair, CDS SHC Council & Board President, Summerhill Co-op of Maplewood
<b>8:45-9:45 am</b>	<b>Preserving our Foundation – Building to the Future</b> Significant milestones, Lute Moberg Principles, Guiding Principles, 10 Commandments of Cooperative Living, senior housing demographics – number, locations, size, age, new development. Results of SCF 2020 Member Survey and comparison to 2010 and 2015 surveys (five-year survey results on member characteristics) Dennis A. Johnson, Board Chair, Senior Cooperative Foundation, Shoreview
<b>9:45-10:00 am</b>	<b>Networking Break – Coffee/Refreshments</b>
<b>10:00-11:00 am</b>	<b>Fair Housing and Your Senior Cooperative</b> Understanding fair housing laws, protected classes, and applicable fair housing rules and guidelines. Discuss general fair housing policies, the Living, Safety, and Well Being policy, assistance animal policies compared to pet policies, and live-in aide policy and agreements. Barb Blumer, Attorney, Barb Blumer Law, P.A., Eagan
<b>11:00-11:45 am</b>	<b>Navigating Community Resources to Support Changing Needs</b> Change is inevitable - be your own best advocate! This session will empower attendees with information about available resources to lean into during times of change. The following resources will be discussed: personal care services; health alert systems; home care, Hospice, Adult Day programming and support networks. “The best time to learn about resources is when ya don’t need them!” Sandy McGurran MSW LISW CHC CYT, Regional Manager of Senior Housing Partnerships, AccentCare Fairview
<b>11:45 am-1:00 pm</b>	<b>Lunch &amp; Awards Ceremony</b> Senior Cooperative Housing Leadership Awards Dennis Johnson, Board Chair, Senior Cooperative Foundation, Shoreview
<b>1:15-3:15 pm</b>	<b>Replacement and Supplemental Reserves</b> Overview of the replacement reserve study – determining the components and costs, funding the replacement reserve requirements, caveats of the study, usage and management of reserves. Required replacement reserves and supplemental replacement reserves. Member/potential member education on reserves. Difference to HUD Capital Needs Assessment. Dan Saul, Replacement Reserve Specialist, Ebenezer Management Services <b>Panel on Managing Replacement Reserves</b> Lessons Learned: How do we use the study, provide input to the study, review the study results, monitor the study, budget implications? How do we educate and inform members and potential members about the study and results? Tom Davis, Board President, Summerhill Cooperative of Maplewood Sandra Thompson, Board Treasurer, Applewood Pointe Cooperative of Eagan TBD
<b>3:15-3:30 pm</b>	<b>Networking Break – Coffee/Refreshments</b>
<b>3:30-4:30 pm</b>	<b>Best Practices in Maintenance at your Senior Housing Co-op</b> This panel will address questions from cooperatives and share their insight and expertise. John Callahan, Director of Maintenance, Ebenezer Management Services, Edina Charlie Padula, Maintenance Engineer, Applewood Pointe Co-op of Champlin Mike Traub, President, Realife Management Services Inc., Apple Valley
<b>4:30 pm</b>	<b>Social Reception &amp; Sponsor Interaction</b>

<b>7:30-10:00 am</b>	<b>Registration, Continental Breakfast, and Networking</b>
<b>8:15-9:45 am</b>	<b>Managers-only Meeting (Optional)</b> An open forum for senior housing co-op managers to discuss challenges and potential solutions with their peers. Moderator: Vicky Chaput, Office & Programs Manager, Cooperative Development Services, Eagan  <b>Board Officer &amp; Committee Member Networking Session (Optional)</b> Join small, informal networking discussions for board officers and committee members to share information and best practices. Individual tables will be labeled for specific officer positions and various committee types. Moderator: Nadette Waligora, Director of Homeowner Associations, Ebenezer Management Services, Edina
<b>9:45-9:55 am</b>	<b>Networking Break – Coffee/Refreshments</b>
<b>9:55-10:00 am</b>	<b>Welcome &amp; Announcements</b> Tom Davis, Chair, CDS SHC Council & Board President, Summerhill Co-op of Maplewood
<b>10:00-10:45 am</b>	<b>EV Charging</b> What is an EV? How do you charge it? How far does it go? Why do you drive an EV? How do I charge it if I live in a cooperative? What are other multifamily buildings installing for EV charging equipment? How do we pay for these systems? Alan Wernke, Electric Car Evangelist
<b>10:45-11:45 am</b>	<b>EV Charging Panel</b> Lessons learned: Our EV journey so far - current EV situation: number of cars total, number of EVs, growth? What do we want to do and when? Current issues, successes. Who will pay for this effort? George Kinney, Member, Kildahl Park Pointe Cooperative of Northfield Lynn Hauger, Member, Applewood Pointe Cooperative of Shoreview TBD
<b>11:45-12:45 pm</b>	<b>Networking Lunch &amp; Close of Silent Auction</b>
<b>12:45-1:15 pm</b>	<b>SCH Purchasing Cooperative</b> Sharing the summary of benefits and advantages of using services of the SCH Purchasing Cooperative. Dennis Johnson, Executive Vice President, SCH Purchasing Cooperative, Shoreview Sandra Thompson, President of SCHPC Board, Eagan
<b>1:15-2:00 pm</b>	<b>Discussion with HUD</b> Minneapolis Housing and Urban Development (HUD) operations and items of interest for Senior Housing Cooperatives, including a Question and Answer Session. Laura Simpson, Asset Management Division Director, HUD, Minneapolis – invited Margaret Stinchcomb, Chief Counsel, HUD, Minneapolis – invited
<b>2:00-3:00 pm</b>	<b>Bringing Philanthropic Capital to Housing Co-ops</b> Housing co-ops operate as nonprofits, but are generally not considered charitable nonprofits, thus unable to directly receive tax deductible contributions and foundation grants. But through the concept of “fiscal sponsorship”, there could be a pathway. We will explore emerging opportunities for co-ops to participate. Kevin Edberg, Executive Director, Cooperative Development Services
<b>3:00-3:15 pm</b>	<b>Networking Break - Senior Cooperative Foundation: Silent Auction Winners Announced</b>
<b>3:15-4:15 pm</b>	<b>Co-op Counsels’ Corner for Your Cooperative: Ask the Experts</b> Discuss key legal issues for senior housing cooperatives. Barb Blumer, Blumer Law, P.A., Eagan Joe Nemo III, Co-op Counsel, Arthur Chapman, P.A., Minneapolis Dan Greenstein, Greenstein Sellers, PLLP, Minneapolis
<b>4:15 pm</b>	<b>Adjourn</b>

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Iowa Institute for Cooperatives  
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Program

Conference logo and promotional  
brochure/agenda design by  
Triangle Park Creative.

# THANK YOU!

## REGISTRATION

### Register by May 8, 2023

This year you may choose to register to attend in-person or virtually. Each person attending virtually must register individually. Cost is the same either way. Registration fees are detailed on the registration form.

Either fee includes a resource notebook and speaker fees. In person attendance also includes continental breakfasts, lunches, breaks and the social. Virtual attendance cost also includes transmitting the conference content.

Overnight lodging is not included in the conference cost, see lodging info below. Contact Vicky Chaput, (651) 265-3678 or vchaput@cdsus.coop, with questions. To register online visit:

[bit.ly/2023SeniorHousingCoopRegistration](https://bit.ly/2023SeniorHousingCoopRegistration)

**Limited Scholarships** are available for cooperatives with 50 or fewer units located outside the Twin Cities Metro area. Contact Dennis Johnson at the Senior Cooperative Foundation, (651) 310-0235 or dennisj@seniorcoops.com, for scholarship information.

### Minnesota Continuing Real Estate Credits

May 31 5.75 hours (pending)

June 1 6.5 hours (pending)

### Lodging – Book by Monday, May 8, to secure group rate

#### Conference & lodging location:

#### DoubleTree Bloomington-Minneapolis South Hotel

7800 Normandale Boulevard, Minneapolis, MN 55439

**Phone:** (952) 835-7800

**Phone Reservations:** (866) 271-8967

**Online Reservations:** [bit.ly/2023SeniorHousingCoopConferenceHotel](https://bit.ly/2023SeniorHousingCoopConferenceHotel)

**Name of group:** CDS Senior Cooperative Housing Conference

**Group Booking Code:** CSH

**Negotiated Rate of \$129.00++ /night** (ends Monday, May 8, 2023)

### Call for Silent Auction Items

Please consider donating items for the SCF auction to help support conference scholarships and other senior cooperatives housing projects. Donations should have a minimum value of \$10 and could include handmade items, artwork, themed baskets, or gift cards. Contact Dennis Johnson, (651) 310-0235 or dennisj@seniorcoops.com, to donate an item.

### Puzzle Exchange



Back by popular demand! Dust off the puzzles you've put together a thousand times and bring them to the conference to exchange for a few new ones. Please drop off your puzzles at designated tables near the registration area.

### Dates to Remember:

April 21, 2023

SCF Award Nominations Due

May 8, 2023

Early Registration Discount Ends

May 8, 2023

Hotel Room Block Expires

May 17, 2023

SCF Silent Auction Donation Forms Due

May 24, 2023

SCH Conference Registration Closes



Name

Title

Cooperative Name

Email Address

Address

Unit #

City

State

Zip Code

Phone Number

Fax Number

Please check one of the following that best describes your relationship with senior housing cooperatives:

- Member of a senior housing cooperative
- Member and board member of a senior housing cooperative
- Administrator/Manager of a senior housing cooperative (fee is the same as co-op member)
- Staff person at a senior housing cooperative (fee is the same as co-op member)
- Developer of senior housing cooperatives
- Professional working with senior housing cooperatives (architect, contractor, attorney, market analyst, etc.)
- Management company (fee is the same as professional/developer)
- Public/Governmental official (fee is the same as professional/developer)
- Other: \_\_\_\_\_

Attending Conference (please check):  In-person  Virtually **(Registration fee is the same for either option.)**

Both Days  Day 1 Only  Day 2 Only

Attending Social (please check):  Yes  No

### MINNESOTA CONTINUING REAL ESTATE CREDITS

**Approval Pending.** May 31: 5.75 hours and June 1: 6.5 hours

Register me for the continuing real estate credits:  Yes  No License # \_\_\_\_\_

Register online by visiting: [bit.ly/2023SeniorHousingCoopRegistration](https://bit.ly/2023SeniorHousingCoopRegistration)

Full conference registration cannot be split between two people. Fee includes conference notebook, speaker fees, continental breakfasts, lunches, breaks, and social.

Participants are responsible for paying lodging and travel costs.

	Early Registration on/before May 8		Registration After May 8		Registration Fee
	CDS Member Pay by Check	Non-member Pay by Check	CDS Member Pay by Check	Non-member Pay by Check	
Full Registration (co-op member/manager)	\$280	\$335	\$330	\$385	
One-day Registration (co-op member/manager)	\$260	\$300	\$310	\$350	
Full Registration (professional/developer)*	\$410	\$465	\$460	\$515	
	<b>TOTAL PAYMENT</b>				

\*No one-day rate available

Please specify any necessary dietary or physical accommodations:

**CANCELLATIONS:** 100% refund for cancellations received by May 12.

No refunds for late requests.

**Online registration. If unable to register online, please email [vchaput@cdsus.coop](mailto:vchaput@cdsus.coop)**

**Make check payable to:** Cooperative Development Services

997 Ticonderoga Trail, Eagan, MN 55123

Email: [vchaput@cdsus.coop](mailto:vchaput@cdsus.coop)

Early Registration Deadline:  
Rec'd on/before May 8

Registration Deadline:  
May 24