



## SESSION DESCRIPTIONS

**WEDNESDAY, SEPTEMBER 14TH**

**9:00 - 10:00 am**



**Opening Keynote Session  
Randy Morgan, CSP  
Aligning Passion with Purpose**

Aligning Passion with Purpose is fun, humorous and entertaining, but these are only tools to gently open minds to the opportunity for freedom. To be more inspired by possibilities than we are comforted by predictability. Imagine what it would be like to have the energy, curiosity, enthusiasm, and unflappability of a child. In our youth these were the gifts of innocence now they must become the skills of experience. Aligning Passion with Purpose is the most important work we will ever do, it is about rediscovering our own way.

**10:00 – 10:15 am** Morning Break

**10:15 am - Noon**

### **Marketing Your Property**

Marketing your property involves much more than curb appeal and simple advertisements in today's technology age. Learn how to affirmatively and fairly market your affordable housing facility utilizing modern tools and strategies.

Instructor: Amanda Atkins – Atkins Consulting Professionals

### **LIHTC Program Regulations**

This session will discuss the origins of the LIHTC program and the role of the IRS, State Agency, HUD, syndicators, investors and owners. We will also cover how to calculate the applicable fractions and other regulatory aspects of the LIHTC program.

Instructor: Gianna Solari, Housing Credit Productions, Orange, CA



## SESSION DESCRIPTIONS

### **Common Mistakes in Fair Housing**

Often, apartment owners and managers are confronted by residents and even prospects who want to know who lives in your community. An inappropriate response to such a question could make you liable for discrimination and the result can end in a costly lawsuit.

In this session we will address these and many other questions, taking Fair Housing “Do’s and Don’ts” on a case by case basis. Through discussion, scenarios and class participation, we will learn how to process applications and how to make informed decisions about who is eligible and how to treat individuals with disabilities. We will learn the difference between intent and effect; that personal statements can be discriminatory.

Instructor: Sharon Jackman – SIG Services, LLC

### **REAC (Maintenance Track)**

This session will provide you with training on how to be most prepared for your next REAC inspection. We will focus on identifying deficiencies, preparation strategies and punch lists.

Instructor: Rick Graham - Acornanalytics

### **D&O Insurance Evaluation**

This Seminar will address questions like: After all of the insurance coverage added and taken away by endorsements and exclusions, what coverage do I really have left? With multiple entity structures, how do we protect the different parties involved? If you get what you pay for, how do I know what insurance carrier is offering the best coverage?

Joe Anderson – Western States Insurance Agency

### **Rural Development Compliance Certification**

#### **(Attendees must register for this course prior to conference)**

The HCM-R, Housing Certification Manager – Rural Development, is a **premier designation** designed to recognize the **Rural Development Manager** who has successfully completed the course and examination. This course covers the entire 3560 handbook and prepares even the seasoned manager for the ever changing regulations in the Housing industry as it recognizes the professionals who achieve the **Certification**

**Instructor: Joe Henry – Compliance Solutions**

### **Music & Aromatherapy Lounge (Open all day)**

Need a moment to relax and get away from the crowds. Join us in the music lounge where we will have music to help you relax and rejuvenate for the next sessions of the day.

Aromatherapy has been used throughout the ages to aid us in leading healthier and happier lives. We will have a unique blend of scents that aid in stress-reduction, and promote peace and happiness.

**12:00 – 1:30 pm**

**Magnificent Managers – Awards Luncheon**



## SESSION DESCRIPTIONS

**1:30 – 3:30 pm**

### **REAC**

This session will provide you with training on how to be most prepared for your next REAC inspection. We will cover scoring, preparing appeals, and the rights of owners and agents when it comes to inspections.

Instructor: Rick Graham - Acornanalytics

### **LIHTC Eligibility - Unit Eligibility and Applicant Eligibility and Certification**

This two-part session will cover Unit Eligibility and Applicant Eligibility.

Unit Eligibility - This segment will show you how to calculate the applicable fractions, maximum rents and utility allowances. You will learn how to maintain your compliance and prepare for the physical inspection. Other overlaying programs, including bonds will be discussed. Applicant Eligibility - will discuss the inclusions and exclusions of income and assets; rules of calculation of income and rent. We will review the application, verification and interview processes.

Instructor: Gianna Solari, Housing Credit Productions, Orange, CA

### **Accessibility in Housing – Section 504 and ADA**

How to ensure compliance with the disability/accessibility laws, Section 504 of the Housing and Rehabilitation Act of 1973 (504) and the Americans with Disability Act (ADA) of 1990). The presentation will discuss compliance with policies and procedures in your application, tenanting and eviction process as well as physical accessibility requirements at your complexes. A discussion will pursue specifically about reasonable accommodations and the best way to process them. Participants will also learn that the new ADA regulations that went into effect in March 2011 regarding the new definition of service dog does not apply to housing. Housing providers must follow the Fair Housing Act and/or Section 504 for requests for assistance animals.

Instructor: Michele Hutchins – FHEO

### **Fair Housing for Maintenance**

- Is Discrimination always Illegal?
- Who might be guilty of violating Fair Housing Law?
- How might vendors and contractors be liable?
- What about the disabled, can we ask about their illness?
- Must we pay attention to State & Local Fair Housing Laws?

In this session we will address these and many other questions, taking Fair Housing examples on a case by case basis through a maintenance person's perspective.

Instructor: Sharon Jackman – SIG Services, LLC

### **Turning a Troubled Property**

Management usually changes when the property isn't performing. Whether you're taking on a troubled property or you have one that is starting to groan, learn to analyze performance, recognize challenges and gain tips on how to turn around a troubled property.

Instructor – Debi Weseloh – The Ross Management Group



## **SESSION DESCRIPTIONS**

### **Rural Development Compliance Certification**

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#### **Stress Management**

Overwork and stress can lead to poor efficiency in the work place as well as a loss of teamwork. Learn how stress dictates your choices in the work setting, key skills for dealing with stress management, and methods for increasing productivity through overcoming work place stress.

Instructor: Amanda Atkins – Atkins Consulting Professionals

**3:30 – 3:45 pm**

Afternoon Break

**3:45 – 5:00 pm**

#### **REAC**

This session will provide you with training on how to be most prepared for your next REAC inspection. We will cover scoring, preparing appeals, and the rights of owners and agents when it comes to inspections.

Instructor: Rick Graham - Acornanalytics

### **LIHTC Eligibility, con't - Unit Eligibility and Applicant Eligibility and Certification**

Instructor: Gianna Solari, Housing Credit Productions, Orange, CA

### **LEP and LAP's: Limited English Proficiency and Language Assistance Plan**

Executive Order 13166 was introduced in 2000 in order to ensure persons with limited English proficiency have access to federal services. Failure to ensure that LEP persons can effectively participate in or benefit from federally assisted programs and activities can land managers in hot water. Learn what is required from you and learn what resources are out there to assist you in staying in compliance.

Instructor: Michele Hutchins – FHEO

### **Emergency & Hazardous Mishap Preparation**

- How do you prepare for an emergency?
- Is there a simple checklist of items to focus on?
- How do you handle household hazardous waste or toxic materials?
- What happens when there is a flood or fire at your community?
- What are your most common emergencies, threats or hazards?

In this session we will discuss many of these questions, taking practical examples on a case by case basis. We will learn what others are doing to educate their residents on the disposal of hazardous materials in their own apartments. Through class participation, we will learn how to prepare for unforeseen issues such as mold, toxic materials, fires, floods, gangs, individual resident incidents and much more.

Instructor: Sharon Jackman – SIG Services, LLC



## SESSION DESCRIPTIONS

### NAHMA Update on National Issues

NAHMA updates us on the key changes in regulations, legislation affecting affordable housing and any relevant late breaking news.

Kris Cook, Executive Director, National Affordable Housing Management Association (NAHMA), Alexandria, VA

### Rural Development Compliance Certification

(Attendees must register for this course prior to conference)

### Time Management

As a housing professional, time is your most valuable asset. Learn tips on how to become a better leader, manager, or facilitator with the use of time management principles, prioritizing, and crisis management.

Instructor: Amanda Atkins – Atkins Consulting Professionals

## THURSDAY, SEPTEMBER 15TH

9:00 am – 10:00 am



**Keynote Speaker:**  
**Meagan Johnson**  
**ZAP the Gap**

Meagan's Zap the Gap presentation helps participants to think more about the methods they use to reach out to the New Millennium, Gen X and Baby Boomer generations? Outdated methods can leave you scratching your head and empty handed. You simply cannot ignore the rising costs of low productivity and high employee turnover resulting from misunderstandings, missed signals and missed opportunities! Zap the Gap offers a comprehensive, thoughtful and humorous look at the generations of Americans in the workplace, and the life events that shaped each generation's work styles, traits, buying habits and needs.

**10:00 am – 10:15 am**

Morning Break



## **SESSION DESCRIPTIONS**

***10:15 am - Noon***

### **The Year of HUD in Review**

Catch up on HUD occupancy and eligibility requirements and changes since the beginning of 2011. We'll take a look at what's new, and how to handle these things at your property. Bring your questions and ideas to share!

Instructor: Bonnie Wilpon – PAWA House of Florida / PMCS

### **LIHTC Recertification, Documentation, & Recordkeeping**

Annual and interim re-certifications will be discussed in depth to include timing, unit transfers, waivers, and the 140% rule. Learn ways how to create and manage recordkeeping systems to accurately retain your files and documentation.

Instructor: Gianna Solari, Housing Credit Productions, Orange, CA

### **Fair Housing Certification (Attendees must register for FHC prior to conference)**

The requirements set forth in the Fair Housing Act and Section 504 regulations are enormously complex and far-reaching. NAHMA's Fair Housing Compliance course trains managers to understand these complex regulations, and provides clear instructions on fair housing laws. The comprehensive, practical training manual for this course includes ready-to-use documents and forms to conduct a Section 504 Self-Evaluation and sample Transition Plan. The course teaches a step-by-step approach to determining the administrative and financial feasibility of making units accessible. Not only does NAHMA's Fair Housing course cover the application process, which includes screening, accepting, and rejecting applicants, it also presents instruction on developing company-wide policies and procedures. The Fair Housing Compliance is a required course for NAHMA's NAHP® certification program. All participants who successfully complete the course and exam will receive a FHC certificate and lapel pin.

Instructor: Sharon Jackman – SIG Services, LLC

### **Bed Bug Management**

The Bed Bug problem continues to increase in residences across the United States. We will go over some basic information on bed bugs and other pests about their health significance as well as how to how to safely and effectively manage an existing infestation. We will also go over some steps to help prevent infestations from occurring.

Tracy Teeples - Beeline Pest Control

### **Mixed Subsidy**

More property owners are turning towards mixed subsidy situations in efforts to prolong the fiscal and physical livelihood of affordable housing facilities. Learn how Project-Based Section 8, I.R.S. Tax Credit, and HOME programs work together at a property, where program compliance areas overlap, and a few key tips in successfully managing a mixed subsidy site.

Instructor: Amanda Atkins - Atkins Consulting Professionals

### **Rural Development Compliance (Attendees must register for this prior to conference)**



## SESSION DESCRIPTIONS

Instructor – Joseph Henry

### **Music Lounge (Open all day)**

Need a moment to relax and get away from the crowds. Join us in the music lounge where we will have relaxing music to help you relax and rejuvenate for the next sessions of the day.

**12:00 – 1:30 pm**                      Lunch on your own

**1:30 – 3:30 pm**

### **EIV Income Reports and Resolving Income Discrepancies**

Join us for an in-depth look at EIV's 3 Income Reports: the Income Summary, Income Report and Income Discrepancy Report. Learn the easy-to-follow steps for Income Discrepancy resolution!

Instructor: Bonnie Wilpon – PAWA House of Florida / PMCS

### **Monitoring and Reporting Compliance**

This session will go through the reporting requirements of State agencies, investor/syndicators. IRS forms 8609 and 8823 requirements will be reviewed. Compliance aspects of fair housing, accessibility and reasonable modification requests are included as well.

Instructor: Gianna Solari, Housing Credit Productions, Orange, CA

### **Fair Housing Certification Continued (Attendees must register for FHC prior to conference)**

Instructor: Sharon Jackman – SIG Services, LLC

### **Back House Tour**

Attendees will be taken on a tour of The M Resort; this unique facility opened in March 2009 and was constructed with green building materials. The hotel boasts 390 rooms, a 92,000 square foot casino floor, 60,000 square feet of meeting and convention space, 100,000 square feet of pool and entertainment space as well as 7 restaurants and 6 bars. Learn how the staff at The M ensures the smooth running of a property this size.

### **Budget Prep: Tips and Hints**

Preparing a budget can be challenging and time consuming. Learn practical tips and hints to help make this process easier.

Debi Weseloh – The Ross Management Group

### **Rural Development Compliance (Attendees must register for this prior to conference)**

Instructor – Joseph Henry

### **Getting the Most from your Membership**

There are many benefits to being a member of Rocky AHMA but many of our members don't know all that is available to them. Join us as we discuss the benefits of your membership and how you can best utilize the association for your organization.



## SESSION DESCRIPTIONS

**3:30 – 3:45** Afternoon Break

**3:45 – 5:00 pm**

### **EIV Update and MOR Requirements**

Discover everything you need to pass the EIV portion of your MOR with flying colors! We'll also review the most current EIV requirements, including information tracking for repayment agreements and where to keep all EIV reports.

Instructor: Bonnie Wilpon – PAWA House of Florida / PMCS

### **Monitoring and Reporting Compliance, Continued**

This session will go through the reporting requirements of State agencies, investor/syndicators. IRS forms 8609 and 8823 requirements will be reviewed. Compliance aspects of fair housing, accessibility and reasonable modification requests are included as well.

Instructor: Gianna Solari, Housing Credit Productions, Orange, CA

### **Fair Housing Certification Continued (Attendees must register for FHC prior to conference)**

Instructor: Sharon Jackman – SIG Services, LLC

### **Curb Appeal – Visual Marketing**

A visual marketing strategy is one of the most important elements in attracting new renters. Curb appeal sets the tone for your entire property. Renters will associate the condition of the exterior landscape with the condition of the interior. Your property should invite renters to view the rest of the property. Learn ways to boost curb appeal by identifying and addressing troubled areas.

Jeff Boyd – Working Knowledge Resource

### **Rural Development Compliance (Attendees must register for this prior to conference)**

Instructor – Joseph Henry

### **Submitting a Property as a Community of Quality**

Affordable housing providers who create safe, attractive, well-maintained properties that are neighborhood assets deserve to be recognized for their outstanding achievements.

That's why the National Affordable Housing Management Association created the **Communities of Quality® (COQ) National Recognition and Awards program.**

When your property meets NAHMA's high standards in physical maintenance, financial management, programs and services, employee credentials and other criteria, it becomes a member of an elite group. COQ properties qualify for regional and national awards, a listing in an online registry of the country's top affordable properties, and the use of COQ marketing materials.

Learn what steps need to be taken to qualify for this prestigious recognition and award program.

**5:15 – 7:30pm**

**Mix, Mingle and Magical Madness – Cocktail Reception**  
Cocktail Reception and Light Snack





## SESSION DESCRIPTIONS

### FRIDAY, SEPTEMBER 16TH

**9:00 am – 11:00 am**

#### **Emotional Intelligence**

Emotional intelligence is the ability to identify, assess and control the emotions of oneself. Learn some of the guidelines to help better understand and take control of your emotions.

Chris Reed – Mercy Housing

#### **SHCM Exam 8:00am – 11:30am**

The examination will be held on Friday, September 16<sup>th</sup> at 8:00 am. The cost for this exam is \$150.00 for AHMA members and \$250.00 for non-members, in addition to the conference fee. It is a closed book exam lasting approximately 3.5 hours. Requirements for certification include a passing score of 72% or higher, have a minimum of 12 hours (actual instruction time) of housing credit specific coursework or training from an approved provider within two years of sitting for the SHCM exam, demonstrate a minimum of two years of housing credit management employment experience and commit to a defined code of professional conduct.

#### **SHCM Candidates With Less than the Two-Year Experience Requirement May:**

Take the exam and complete the 12 hours of housing credit specific coursework, however, these candidates will need to participate in a “candidacy period” equal to the amount of time remaining to meet the two-year experience requirement. Once the candidacy period is satisfied, the candidate may then begin to use the SHCM certification.

#### **Fair Housing Certification Exam 8:00am – 10:30am**

#### **Slip and Fall Hazards**

This Seminar will reinforce and build awareness of various property pitfalls and issues that create third-party insurance claims. Included is an *interactive* CAD-system, apartment complex simulation. This will help property managers and maintenance personnel hone their skills at identifying and eliminating various slip and fall hazards on their properties.

Joe Anderson – Western State Insurance Agency

#### **HUD Update**

This session will be composed of HUD representatives who will provide and update on the most recent developments in HUD and address topics of interest. This interactive session will also allow for questions and cover any additional timely topics at hand.

Marcie LaPorte and Denver Multifamily Hub staff



## **SESSION DESCRIPTIONS**

### **Rural Development Certification Exam 8:00am – 10:30am**

#### **The Gift of Fear Book: Discussion & Lecture**

“Author Gavin de Becker says victims of violent behavior usually feel a sense of fear before any threat or violence takes place. They may distrust the fear, or it may impel them to some action that saves their lives. A leading expert on predicting violent behavior, de Becker believes we can all learn to recognize these signals of the "universal code of violence," and use them as tools to help us survive. The book teaches how to identify the warning signals of a potential attacker and recommends strategies for dealing with the problem before it becomes life threatening. The case studies are gripping and suspenseful, and include tactics for dealing with similar situations.” – The Gift of Fear. Amazon.com Review

Join us as we discuss this compelling book and go over helpful tools to keeping yourself and your residents safe.

Speaker: Don Stewart -

***11:15 am – Noon***

#### **Wrap Up Closing Session**