



## Breakout Session Schedule

ALL SESSIONS WILL BE HELD AT THE MARRIOTT DOWNTOWN TACOMA  
ALL SPEAKERS AND TOPICS ARE TENTATIVE AT THIS TIME

**Monday, April 24**

8:00 am-5:00 pm

### **1 Day CPO – Gwen Volk**

The Certified Professional of Occupancy (CPO) one day course is a fast-paced condensed version of the NAHMA CPO full three-day course. Designed for the busy property management staff in mind.

This course was developed for well-suited professionals who have been actively working in the affordable housing industry and who:

- Have taken a comprehensive occupancy related course(s) in the past several years (online or classroom)
- Have extensive exposure to the HUD 4350 and familiarity of how to navigate the handbook.

*Additional fee and registration required for this course*

**Tuesday, April 25**

10:45 am -12:15 pm

### **Property Management Track Session I – Rural Development – Day 1 – Joe Henry**

- Application Process
- Waiting List and income limits
- Determining income

### **Compliance 1 Track Management & Occupancy Reviews (MORs) – Jim Miller, CMS**

Jim Miller, a Compliance Specialist for CMS, has been on both sides of the Management and Occupancy Review (MOR) process and has conducted over 250 MORs throughout Nebraska and Utah. In this session, Jim will discuss some helpful tips and tricks to prepare for, conduct, and close-out an MOR with as little stress as possible. His insights shared during this session will leave you feeling much more comfortable and prepared for your next review.

### **Compliance 2 Track LIHTC “Unit Rules” Available Unit, Vacant Unit, Unit Transfer, etc – Gwen Volk**

Master the special unit rules of the tax credit program: The available unit rule, the Vacant Unit rule, the Unit Transfer rule and the Manager unit rules. A straightforward, practical discussion of the rules that make the tax credit program challenging – especially on mixed income properties – with lots of examples and the opportunity to practice applying these rules in real-life situations.

**Maintenance Track**      *Safety Planning: Minimizing Impacts to Property Operations* – Scott Ployer

- Safety planning is critical to a company's operations.
- Learn successful strategies when developing or enhancing your safety program including the who, what, when where, why and how of a successful safety management program.
- An effective safety management program not only helps to protect staff, resident, visitors, and guests, but can also help manager and control a number of other business and operating costs.
- Why a well-managed safety program helps to maintain and protect your company's image and reputation within the community.
- How to implement safety programming, even on a budget.

**Industry Track**      *Preservation Workshop - making RD's prepayment process work for you* – Larry Anderson,

A hands-on workshop to talk about how to use RD's preservation/prepayment process to accomplish your ownership goals as your property gets closer to mortgage maturity. This will be a deep dive on how to make it work for you. Bring your questions or send them in early. Larry will be presenting remotely.

1:15-2:45 pm

**Property Management Track Session II – Rural Development – Day 1** – Joe Henry

- Determining Income (Continued)
- Determining Asset income

**Compliance 1 Track**      *Enterprise Income Verification Requirements (EIV)* – Jim Miller, CMS

This session will provide a history of the Enterprise Income Verification (EIV) System and why it is important to affordable housing. CMS will review the Summary Report, Income Reports and Identity Verification Reports and examine how these documents are not only vital for accurately calculating a tenant's income, but also for determining program eligibility. The session will include a discussion of best practices for using EIV, along with real-world examples of the effectiveness of its application.

**Compliance 2 Track**      *Section 42 Non-Compliance: How it Happens and How to Repair* – Gwen Volk

The IRS 8823 Guide lists the 17 types of non-compliance that state agencies must report to the IRS. Learn the common mistakes that lead to non-compliance, how to avoid them, how to repair them if they occur and the penalties that are incurred for each.

**Maintenance Track**      *Indoor Air Quality* – Scott Ployer

IAQ, Indoor Air Quality provides participants with an overview of IAQ standards and associated environmental impacts learned from the Covid-19 Pandemic. Participants will be better able to identify indoor air pollutants, and hazards, and develop a process to eliminate them.

Learn the key elements of an effective IAQ program, including,

- Utilizing the basic principles of IAQ to assess and address environmental conditions such as moisture, mold, pets, smoking, dust, dirt, pest droppings, carbon monoxide, radon, etc., as they all impact breathability
- Applying the latest strategies to evaluate, identify, document, and mitigate issues and to provide residents with the best and highest degree of indoor air and environmental quality.
- Identifying products that could potentially pose a health risk and replace them with less intrusive alternatives
- Assessing and redefine existing workflow processes that may have a negative impact on an individual's indoor quality of life issues.
- Providing essential resident and staff education and instill ongoing reminders as these all play an extremely important role with the overall success of the program

## **Other** AHMA Annual Meeting

Please send at least one representative from your organization. Information regarding the election of Board Members will be provided. Eileen Hearty, Director, Asset Management Division/Satellite Office Coordinator of HUD, Larry Anderson of Rural Housing Preservation Associates LLC and Kris Cook of NAHMA will give brief rural housing Federal regulatory and legislative update. Spencer Anderson (United Marketing), President of AHMA, will chair the meeting.

3:15-4:45 pm

## **Property Management Track Session III – Rural Development – Day 1 – Joe Henry**

- Determining Asset Income (Continued)
- Deductions
- Certification Processing

## **Compliance 1 Track** *Budget Based Rent Increase training* – HUD staff

Join HUD Multifamily to discuss the submission process for Budget Based Rent Increases (BBRI). The session will include how to submit complete packages for requests to increase rents for both PRAC 202/811 and Section 8 HAP Contracts. Representatives from the Denver Satellite Office of the MF West Region will share best practices and reminders to help you with your future submissions.

## **Compliance 2 Track** *How to Affirmatively Market to the Least Likely to apply* – Gwen Volk

The office of Fair Housing and Equal Opportunity is talking a lot these days about “segregated properties”. These are properties where the majority of the residents and/or waiting list are of one race, but the market and/or expanded market area are more diverse. For example: Property – 88% White, 0% Black/African American, 1% Asian, 0.2% American Indian/Alaskan Native, 0% Native Hawaiian/Pacific Islander. Market Area – 66% White, 4% Black/African American, 1.3% American Indian/Alaskan Native, 9.5% Asian, 0.7% Native Hawaiian/Pacific Islander, 12.4% two or more races, and 5.8% some other race. (Those are the statistics for the State of Washington.) In this session, our focus will be on how to do affirmative marketing to the least likely to apply in a way that is meaningful and within the spirit of what the law requires of the owners of HUD Multifamily and Rural Development properties. We will also discuss what FHEO is doing to get racially and/or ethnically concentrated properties to comply.

## **Maintenance Track** *Effective Preventative and Predictive Maintenance Planning* – Scott Ployer

Preventive maintenance has always been an important task that we perform at our properties. This session will take that principle one step further by adding predictive maintenance and its importance.

Participants will learn the key elements of an effective PM and PdM program, including;

- Defining the different types of maintenance
- Understanding financial implications
- Challenges to managing an effective PM and PdM program
- How to present your project ideas to leadership so that they get approved
- Ensuring success and ongoing results

## **Industry Track** *Tax Credit HOT Topics with WSHFC* – WSHFC staff

Meet and hear from WSHFC Portfolio Analysts on new policies and procedures you need to know to keep your tax credit property in compliance. Topics will include new 8823 policy for on-site deficiencies, Average Income set-aside, 2023 Extended Vacancy/Rent-Ready Report, latest FAQ updates, and much more.

Wednesday, April 26

8:30-10:00 am

**Property Management Track** *HOME Rental Compliance* –TyeRae Guined, Dept of Commerce

This session will cover what you need to know to keep your State HOME units in compliance. Topics include, Tenant Selection Plans, Waitlist, Income Certifications, Rent and Utility Allowance approval and more.

**Compliance 1 Track** *Budgeting and Bottom Line Thinking* - Scott Ployer

Effective budgeting skills are essential for a property management professional's continued growth and professional development. This session will help participants gain a better understanding of the processes and intended outcomes.

Learn the key elements of budgeting including;

- Understanding the budgeting process
- Learn advanced forecasting techniques
- Understanding financial terms
- Learn how to manage to a budget
- Identify how to analyze budgets
- Understanding trends that have impact to the bottom-line
- Identify smart procurement practices
- Understanding the legal aspects of budgeting...and more.

**Compliance 2 Track Session IV – Layered Programs/ Tax Credit, HUD, RD – Day 2–** Joe Henry

- Introduction to each Program type
- Student Status
- Income Limits
- Verification of Income and Assets

**Maintenance Track** *Safety by choice, not by chance!* – Jessica Hart & Jedd McDaniel, Allied Residential

Organ donor = A person who doesn't pay attention to their safety program at work.

Does your company have a robust safety program? Are you involved? A safe and healthy workplace not only **protects workers from injury and illness, it can also lower injury and illness costs, reduce absenteeism and turnover, increase productivity and quality, and raise employee morale.** Join us for a real conversation on how to build a safety program, how to make safety a priority, and gain company engagement so every employee can go home each day in better condition than when they arrived at work.

**Industry Track** *It's all in the Details – What's Required for a Successful Notice* – Brett Waller, HNN

The session will cover the requirements in Washington to serve a notice and what is necessary for it to be successful.

10:15-11:45 am

**Property Management Track**    *Gig Income and New Age Assets* – Gwen Volk

Numerous online platforms make it possible for our residents and applicants to generate income from assets they possess such as boats and homes, and connect with customers to provide other goods or services like rides, household chores, or technology services, to name but a few. Meanwhile, assets have expanded from the sticks and bricks bank down the street and a plot of land to include cybercurrency and on-line payment, banking and fund-raising options. Finding out about and then verifying and calculating income from the gig economy and new age assets is a challenge for the property manager. And regardless of the program, neither the oversight agencies nor our rule books give us much help on how to do this. This course shows you the basics of working with these 21st century sources and doing your due diligence to help ensure that the right benefits are going to the right individuals.

**Compliance 1/Maintenance Track**    *The Fork in the Road: Where Management and Maintenance Meet* – Scott Ployer  
Learning Outcomes and Key Elements.

- How to collaborate as a true partner.
- How to foster higher degrees of teamwork.
- The characteristics of a high performance team and how to manage them.
- The importance of effective and consistent communication.
- How to manage a remote workforce.
- How to train your high performance teams.
- The techniques of an effective team meeting.
- And more more...

**Compliance 2 Track Session V – Layered Programs/ Tax Credit, HUD, RD – Day 2**– Joe Henry

Employment Income  
Zero Income  
Household Size and effective dates  
Recertification Processes/Deductions and Allowances

**Industry Track**    *Supporting Survivors of Domestic Violence and Recovering Lost Income* – Brett Waller, HNN

This session covers the topic of domestic violence and the use of the Landlord Mitigation Fund to support survivors and housing providers.