

2017 Affordable Housing Conference and Annual Meeting
November 15-16, 2017, The Westin Indianapolis
Presented by the Affordable Housing Association of Indiana
Co-Sponsored by USDA Rural Development and Indiana Housing & Community Development Authority

Wednesday, November 15

7:30-9 am

Registration Opens – Networking in the exhibit area

9-10:15 am

Hospitality as a Marketing Tool – Gus Gutierrez, Biggs Property Management

The connection between hospitality and property management is not that far off. In fact, both industries share very similar characteristics ranging from first impressions and follow-up, to personalized customer service. You don't have to break the bank emulating a hotel experience either. Join me for a discussion on how you can adopt traits from the hotel industry as marketing tools that will build loyalty and referrals with your residents.

Body Language and Unconscious Bias – Mary Manuel, Cinnaire

Body language (non-verbal communication) is one way we promote how we are perceived at work and home. There are times when we send mixed messages – saying one thing, but our body language reveals something completely different. This non-verbal language affects how we act and react to others, and how they react to us. People make sweeping judgments and inferences based on body language, called unconscious bias. Those judgments can predict meaningful life outcomes whether that be who we hire, promote, or even who our friends are.

In this session you will learn the brand you're currently known for. Next, you will create a concise personal brand statement describing what or who you want to be known for. Finally, you will learn to help align your communication and actions with your desired perception. It can take very little time to adjust your non-verbal communications by rebranding yourself simply by being aware of how you want to be perceived.

Plumbing 101 - Part 1 of 2 – Brian Goldjarb, HD Supply

The most common service requests involves plumbing. During this course the plumbing system will be discussed starting from the water meter, following the supply line into the building, to where the water comes out of the fixture and down through the drain. We will also go over the installation of fixtures along with drain cleaning, safety and problem diagnosis of toilets.

- *Topics covered in this class:*
- *Correct water pressure*
- *The parts and operation of a water heater*
- *Replacement or repair of a vanity or kitchen sink*
- *Replace or repair a faucet*
- *Use of common plumbing tools*
- *Servicing, parts and troubleshooting a toilet*
- *Proper techniques for servicing, cleaning and resetting a disposal*
- *Health concerns while making plumbing repairs*
- *Chemicals and their use in plumbing*
- *Personal protective equipment*

Hot Topics in Compliance – Matt Rayburn, Celia Ringle and Devyn Smith, IHCDA

An annual tradition returns! IHCDA compliance staff will discuss hot topics and pressing issues, allowing ample time for questions and answers. Topics will include both LIHTC and HOME compliance, as well as important IHCDA updates.

Good Drugs Gone Bad: How You Can Help Protect the Elderly from Medication Harm – Dr. Amy Peak, Butler University

In this interactive session, participants will learn about common prescription drug related problems in the elderly such as “polypharmacy” unintentional overdoses, and targeted diversion. We will discuss practical ways to identify problems and help clients (and loved ones) take steps to prevent harm.

TRUST: How to Make It Work – Jon Hocking, Art of Leadership Advisors

“Trust is the key to success in any relationship – business or personal.” Although we all know this statement to be true, why is it so difficult to put our finger on the key to building trust in our relationships? This interactive workshop will help you to clearly and succinctly define trust, assess your personal credibility, and identify specific action steps to take to build trust into even your most challenging relationships. Participants will learn that once trust is established, even the most difficult tasks become easier, faster, and more fun, saving time and money for the organization.

10:15-10:30 am

Break! Networking in the exhibit area

10:30-11:30 am

Property Predicaments! A Story Problem Session for Managers, Agents and Owners – Kelly Hobson, Kimberly Hyde, Donna Shenk and Ashlee Cadman, USDA RD

This class will provide you with real life scenarios involving recertification, changes in tenant household circumstances and other situations that may arise in the day-to-day responsibilities of site managers and owners. Rural Development staff will walk through select story problems, offer discussion time from the audience and deliver the correct answers in responding to the issues based on regulation.

Preparing for a Management and Occupancy Review (MOR) – Evin Bond, Herman & Kittle Properties, Inc.

Don't be afraid of your next Management and Occupancy Review! This session is intended to provide detailed information about the MOR readiness process.

Plumbing 101 – Part 2 of 2 – Brian Goldojarb, HD Supply

My Application was Successful ... What Now? – Matt Rayburn, Peter Nelson and Matt Harris, IHCDA

A panel of IHCDA staff will discuss what happens after you receive a reservation of Low-Income Housing Tax Credits. Topics will include the carryover agreement, 10% test, semi-annual progress reports, progress inspections, final applications and issuance of 8609s.

Interview and Deception Training – Shawn Bain and Michael N. Powell, Global Drug Concepts, LLC

How much do you really know about what someone is saying or behaviors they are exhibiting? Attendees of this course will walk away with a newfound knowledge in the art of interviewing and reading deception that can be applied to the workplace and home.

Active Shooter Preparedness – Gregory Howard, US Department of Homeland Security

This session provides guidance to individuals, including managers and employees, to assist them in preparing to respond to an active shooter situation.

The presentation will include:

- *An overview of the characteristics of an Active Shooter*
- *A discussion on the actions to take when confronted with an active shooter and responding law enforcement officials*
- *Information on materials and references available to enhance Active Shooter preparedness and response efforts*

Planning for the New Partnership Audit Rules and Other Recent Changes in the Tax Regulations – Phil Kirkendall, Clark Schaefer Hackett

Ensure you're prepared for the new partnership audit rules that go into effect January 1, 2018. Clark Schaefer Hackett's Phil Kirkendall will discuss how to plan for these and other recent tax law changes that are likely to impact tax credit partnerships.

11:30 am-12:30 pm

Lunch, exhibitor/sponsor introductions, AHAIN business meeting and scholarship presentation, Affordable Housing National Update by Colleen Fisher, Council for Affordable and Rural Housing

12:30-2 pm

Keynote Presentation – Jimmy Wayne – Walk to Beautiful: The Power of Love and a Homeless Kid Who Found the Way

Jimmy Wayne is a former foster kid turned award-winning country recording artist whose songs and story highlight his mission to raise awareness for children in foster care. Jimmy's hits include "Stay Gone," "Paper Angels," "I Love You This Much" and "Do You Believe Me Now," which earned BMI's prestigious Million-Air Award marking one million radio spins in America. In 2009, Jimmy toured with Brad Paisley and recorded "Sara Smile" with Rock 'n Roll Hall of Fame duo Daryl Hall and John Oates.

*In 2010, Jimmy walked halfway across America (from Nashville to Phoenix) to raise awareness for kids aging out of the foster-care system. In 2012, Jimmy helped get legislative bills passed extending the age of foster care to 21 in California, Tennessee, North Carolina and Ohio. In 2014, he released *Walk to Beautiful: The Power of Love and a Homeless Kid Who Found the Way*, a three-time New York Times bestselling memoir which quickly crossed the 100,000 print sales milestone. In 2016, he received the prestigious Points of Light award from President George W. Bush, and in 2017 he received an honorary Doctorate of Humane Letters from William Woods University.*

Jimmy has performed on the Grand Ole Opry more than 215 times. He lives in Nashville and continues to work tirelessly on behalf of at-risk foster youth by performing, writing books, and keynote speaking. Jimmy's ultimate goal is to build transitional homes for youth who age out of foster care without a place to live.

*Jimmy's third book, *Ruby the Foster Dog*, will release November 1 on BroadStreet Publishing.*

2-2:15 pm

Break! Networking in exhibit area

2:15-3:45 pm

7 CFR 3560 Regulatory Compliance & Safe Guards (Discussion of Unnumbered Letters) – Bill Hacker, Sylvia Rhinehart, Amy Koch and Brenda Shaffer, USDA RD

Unnumbered Letters are issued to clarify regulation/instructions on particular subject matter. The unnumbered letters we will be sharing with you in this session addresses project operational expenses which impact proposed budgets and year-end actual report values and the Affirmative Fair Housing Marketing Plans; in addition, if time permits, there will be clarification on MINC issues. This is one session you don't want to miss this year!!

TRACS 203A Update – Part 1 of 2 – Nicole Scott, RightTracs

The current version of TRACS, 202D, is being upgraded to 203A in order for HUD to accept data from Multifamily Housing (MFH) business partners that complies with updated policies and procedures. This session is being offered to prepare users for the updates that will be made to the TRACS system with TRACS Release 203A. We will cover all updates to MAT Tenant and Voucher/Payment System Record files as well as highlight applicable policy changes (as detailed in the TRACS Release 203A Industry Specifications). Please note that we will not cover the submission process or how these changes appear in various property management software systems; instead we will summarize the substantive changes that will be implemented with TRACS Release 203A.

Heating with Gas and Electric – Part 1 of 2 – Brian Goldojarb, HD Supply

In this class, technicians will learn the hows and whys of heating systems. It's designed to cover both electric and gas controls and how they work on air handler type systems. Controls on other types of systems can be discussed at the student's request.

At the completion of this course the student can:

- *Install a Lock-out, Tag-out as necessary*
- *Follow safe working practices to perform common heating repairs*
- *Describe the operation of the standard electric and gas heating systems*
- *Identify and describe the operation of standard components of heating systems*
- *Understand problems associated with natural gas*
- *Describe the movement and use of electricity to control and run heating systems*
- *Understand the importance of preventative maintenance*
- *Describe and identify dangers associated with carbon monoxide*

HUD Utility Schedule Model Utility Allowance Method – Start to Finish – Anthony Phillips, Herman & Kittle Properties, Inc.

Tired of using the PHA Utility Allowance? Wish there was a way you could lower your utility allowance? You're in luck! In this session, we will tackle a commonly avoided alternative utility allowance method, the HUD Utility Schedule Model. Participants will be walked through each step of the process, from gathering the local utility company rates to submitting the model to IHCD for approval. It's not as scary as it seems!

Note: We will be using an Indianapolis-based property as the sample property for the calculation, so if you have an Indianapolis property, there's a good chance you'll leave the session with the tools to lower your own utility allowance right away.

Drug Awareness: What if it Happens at Your Property – Shawn Bain and Michael N. Powell, Global Drug Concepts, LLC

A class specifically geared towards property managers and on-site staff. Attendees of this course will learn more about the warning indicators pre-rent, indicators of drug activity and stash houses and recognizing when there is drug dealing occurring on your premises. Walk away with a knowledge on how to spot drugs in your communities and the proper authorities to contact.

The Language of Leadership: Transforming Complaint to Commitment – Denise Stein, Art of Leadership Advisors

The Language of Leadership is an interactive workshop that enables participants to reveal the commitment that lies behind complaints and teaches them how to use that knowledge as a powerful leadership tool. Equipped with this knowledge and insight, participants will identify their leadership styles and learn how to choose the most effective approach to overcome obstacles and accomplish goals.

Year 15: Getting Prepared for a Low-Income Housing Tax Credit Partnership – Chris Key, Novogradac & Company LLP

Year 15 planning for a low-income housing tax credit (LIHTC) partnership starts even before the tax credit period is over. This session will briefly cover the alternative courses of action and exit strategies that are available for property owners when the 15-year compliance period comes to an end and how a LIHTC partnership can be better prepared. The session will also provide information on additional resources that can provide in depth information related to year 15.

3:45-4 pm

Break! Networking in the exhibit area

4-5 pm

LIHTC Jeopardy – Katie Vondra, Cinnaire

LIHTC Jeopardy will test both participant and the audience knowledge of LIHTC information in an interactive, friendly competition. The game will cover the not-so-basics of LIHTC and dig into various topics foundational to knowledge of the program. The game is played with two teams. A correct answer will also allow that team to select the topic of the following question. Like the game of Jeopardy, there are two rounds – daily doubles and final Jeopardy. Our version will focus primarily on LIHTC questions to best improve our collective knowledge, sprinkled with some pop culture trivia to add a bit of levity.

TRACS 203A Update – Part 2 of 2 – Nicole Scott, RightTracs

Heating with Gas and Electric – Part 2 of 2 – Brian Goldojarb, HD Supply

Let's Talk About Supportive Housing – Matt Rayburn, IHCD

Supportive housing is a proven method of ending homelessness through combining affordable housing with services. In this session, learn more about what supportive housing is and how supportive housing developments operate.

Physical Dependency, Addiction and Recovery – Shawn Bain and Michael N. Powell, Global Drug Concepts, LLC

In this course, attendees will receive training on recognizing the differences between dependency and addiction, the recovery process and how drugs affect the chemistry in the brain.

Key takeaways:

- *The knowledge to gauge drug use in residents at your properties*
- *Understand what it looks like when they stop using*

Leading a Culture that Attracts and Retains Talent – Stan Hannah, Plante Moran and Kelly Martin, Cinnaire

This session will challenge you to confront your assumptions about how to attract and retain talent. We will address the difficult questions about the steps to distinguish your company from the competition and create an environment that motivates people to bring passion and dedication to work every day. The discussion will also include the risk factors associated with leadership turnover and include a five-step action plan that leaders can implement to build a succession plan for the future.

Accounting Related Session – Dauby O'Connor & Zaleski, LLC

Need Title and Description

5-6:30 pm

Denim and Diamonds Networking Reception, Live Entertainment and AHAIN Silent Auction

6:30 pm

Dinner on your own

Thursday, November 16

7:30-8:30 am Registration Opens – Continental Breakfast, Networking in the exhibit area

8:30-9:45 am

Round ‘Em Up with Social Media! – Natalie Mabbitt, Kirkpatrick Management Company

Are you wondering how to use Social Media to promote your community? This class will focus on learning new tricks on reigning in prospects and roping in others.

TRACS 201 – Part 1 of 4 – Nicole Scott, RightTracs

This training will provide participants with best practice recommendations for monthly TRACS processing, which will include identifying and resolving TRACS errors and managing subsidy receivables. Throughout the training we will discuss how to read and understand a Housing Assistance Payment (HAP) ledger. Additionally, we will review how to read and interpret a Subsidy Payment Voucher (form HUD-52670) and corresponding Project Based Contract Administrator reports (including the HUD/CA Approved detail on a Subsidy Payment Voucher and the TRACS Transmission Report). Next we will provide an overview of how to use and understand the MAT User’s Guide when attempting to troubleshoot TRACS errors. The course will provide its participants with hands on experience reviewing and resolving a handful of common TRACS errors and solutions, including resubmissions, corrections to certifications, and baseline certifications. Finally, we will conclude the training by providing a couple of examples of how to use the tools available to work with either a PBCA and/or HUD to research outstanding subsidy receivable balances and collect payment.

Make-Ready Maintenance – Part 1 of 2 – Brian Goldojarb, HD Supply

This course is an overview of the process to make an apartment ready for a new resident.

Topics of discussion will be:

- *Walking the make-ready*
- *Accountability & documentation*
- *Organizing the make-ready process*
- *Scheduling contractors*
- *Timely completion of the unit*
- *Final inspection and follow up*

Compliance CalcOlympics! A Athletic Competition – Jillian Toole, Novogradac & Company LLP

Learn to calculate income using the preferred methods of IHCDA and the IRS; paystubs, work number, employment verification, gifts, child support, and more. We’ll use them all to gather what we’ll need to calculate the greatest potential income of a household as defined by the LIHTC program. Then, we’ll put our honed skills to the test in a head-to-head competition of calculating mastery in the first Compliance CalcOlympics.

Housing Instability for Survivors: Your Mandate to Address Intimate Partner Violence – Kerry Hyatt Bennett, Indiana Coalition Against Domestic Violence

It is no secret that the worlds of public housing and intimate partner violence often merge, very often, tragically. In response, Congress has expanded the housing protections available to survivors of domestic violence, sexual assault, and stalking in the VAWA reauthorization of 2013, and with those changes came protocols and forms you

need to know. This presentation will review the background and relief available under the Violence Against Women's Act, who it applies to and the necessary forms to guide you in your work with survivors of violence.

Fair Housing Basics – Angelita Fisher, Law Office of Angelita E. Fisher

Knowing the basics of fair housing laws will assist owners, managers and staff in making better decisions on what law may apply to their residents and what actions may violate fair housing laws. In this session, we will discuss the basics and updates of fair housing laws and the process by which residents may make complaints. Our discussion will include: Identifying What Law Applies to You; The Protected Classes; Types of Discrimination/Harassment; The Complaint Process; and Retaliation.

Knowing Me, Knowing You: Becoming More Effective Through Emotional Intelligence – Josh Ghena and Katie Vondra, Cinnaire

Our industry is one rife with focus on hard technical skills – lots of acronyms, procedures, and processes. At the end of the day, though, it's a people process – with lots of complimentary, albeit at times, confrontational styles colliding. We will lead you through a highly engaged, interactive session designed to better understand the essence of what we each bring to the table – strong points and challenges. You'll leave this session with some good tools to help you communicate and ultimately become strong in your role when working with others.

9:45-10 am

Break! Networking in the exhibit area

10-11:30 am

General Overview of the Preliminary Assessment Tool (PAT) – Michael Boards, Jeff Devers, Carla Haskins and Matt Phillips, USDA RD

The key parties to the transfer are the seller, purchaser, the agency (on behalf of the tenants and as mortgagor) and any third party funders.

The PAT is used to assist the Agency and staff in the preliminary analysis and timely processing of applications by early identification of issues needing to be addressed during the review process.

Version 6.0 was released May 2017. The PAT is posted to the public website for applicants when developing transfers and MPR applications for the initial discussion on feasibility with RD Staff.

In this session you will learn the things to look for when completing the PAT from Rural Development's perspective.

TRACS 201 – Part 2 of 4 – Nicole Scott, RightTracs

Make-Ready Maintenance – Part 2 of 2 – Brian Goldojarb, HD Supply

Analysis of a Troubled Deal – David Helm, Josh Ghena and Josh White, Cinnaire

A closer look at troubled deals using a case study. This session will focus on stakeholder identification and the tools necessary to properly negotiate the terms of an action plan. The discussion will include ways to create buy-in from the relevant stakeholders and an exploration of how you should be defining a successful negotiation.

Smoke-free Housing: How a Simple Policy Change Can Better Resident Health and Protect Your Property – Cathy Blume, American Lung Association of Indiana

This session will go over some of the health effects associated with second and third hand smoke, the legality of smoke-free policies, a panel discussion with owners and managers of properties that have gone smoke-free, and resources the American Lung Association of Indiana can provide to assist in going smoke-free. The panel will touch on how they took their properties smoke-free, address misconceptions they had about smoke-free policies as well as advice on how others can go smoke-free at their properties.

Domestic Violence and VAWA – Angelita Fisher, Law Office of Angelita E. Fisher

Domestic violence on your property is a serious issue. When it involves a resident, many different laws come into play including the Fair Housing Act and the Violence Against Women Act. The overwhelming guidelines can be intimidating. In this session, we will discuss the different laws that apply to domestic violence victims including an update on the latest VAWA rules. We will go over what documentation you may require, what history you may or may not consider from an applicant's background check and how to facilitate an emergency transfer. Please join us for a look at the latest domestic violence issues facing landlords.

11:30 am-12:00 pm

Lunch

12:00-12:30 pm

RD awards and AHAIN awards

12:30 pm-1:15 PM

Keynote Speaker – Denise Stein, Art of Leadership Advisors – WHY??? What's Your Vision?

Why do I do what I do for a living? Why this job/profession? Why this team or department? Why this organization? Why this industry? Why??? Denise Stein helps us to reveal our responses to these (not so) simple questions and to unleash our most powerful leadership potential.

1:15-1:30 pm

Break! Networking in exhibit area

1:30-3 pm

Conquering Compliance with Multiple Housing Programs – Part 1 of 2 – Amanda Lee Gross of E&A Team, Inc.

The Low-Income Housing Tax Credit Program's Acquisition/Rehab credits have been hugely successful in preserving numerous aging HUD and RD multi-family housing projects. However successful, this layering of funding can create compliance challenges for those responsible for administering these programs for a project. Additionally, the use of HOME funds, needed as gap financing in many of these deals, can further complicate compliance matters.

In this three-hour session Amanda Lee will dive deep to the murky depths of regulations and will bring to light how to maintain compliance with multiple housing programs, such as HUD, RD, LIHTC and HOME funds. This course is perfect for any compliance professional involved in LIHTC Acquisition/Rehab projects with federal

funds, or involved in the day to day compliance operations for a LIHTC project layered with a federal housing program.

Topics to be covered, include:

- *Overview of Conflicting Compliance Requirements by Housing Program*
- *Proper Application of Income Limits and Rent Limits*
- *Treatment of Over-income or Ineligible Tenants*
- *Managing Unit Transfers Acquisition/Rehab & the Uniform Relocation Act*
- *After attending this session, attendees will be able to:*
- *Understand the Impact of LIHTC Acquisition/Rehab on projects with HUD, RD, and HOME funding,*
- *Be able to access multiple program requirements and determine policies for ensuring compliance with all programs applicable to a project,*
- *Identify the key compliance differences between the most common affordable housing programs, LIHTC, HOME, RD, and HUD.*

TRACS 201 – Part 3 of 4 – Nicole Scott, RightTracs

Fair Housing for Maintenance – Staying Out of a Sticky Situation – Angelita Fisher, Law Office of Angelita E. Fisher

Maintenance employees are on the front-line of the fair housing battle. They often see and interact with the residents more than anyone else in the Company. It is important maintenance employees know what to say and do before they are put into a sticky situation. In this session, we will discuss common sticky issues maintenance employees encounter and realistic steps they can take to avoid getting in trouble with HUD. Our conversation will include: encountering nude residents, minor children at home alone, personal relationships with residents, HUD's rule on harassment, witnessing unlawful activity and much, much more.

Affordable Housing Conversations – Mark Shelburne, Novogradac & Company LLP and Matt Rayburn, IHCDA

Wrap up your conference experience by joining Mark Shelburne from Novogradac and Matt Rayburn from IHCDA as they sit down for a chat about current hot topics and trends in the affordable housing industry. Audience participation through questions and comments is encouraged.

Placemaking: What It Is, How to Do It and How to Fund It – Carmen Lethig, IHCDA, Veronica Watson, Patronicity, Levi Rinker, City of Anderson, and Wendy Blake, Main Street Greensburg

Placemaking is the buzz word in the community development field right now. Learn about the different types of placemaking and about CreatINg Places, an innovative funding program that supports placemaking projects through “crowdgranting.” Finally, hear from two panelists that have successfully used CreatINg Places to engage their communities and fund exciting new placemaking projects.

Professional Presence – Kelly Martin and Anthony Winston, Cinnaire

Be a part of the live studio audience as Kelly and Anthony discuss how your personal brand may be impacting you in ways you're not aware of. Learn tips, techniques and some tricks of the trade to take your personal brand to the next level and keep you ready for any opportunity that comes your way.

Exit and Transition Planning – Rebekah Payne, Crystal Faulkner and Chuck Stevens, MCM CPAs & Advisors, LLP

In the next 20 years, more than 90 million people in the US and Canada will be retiring. This will result in the largest generational transfer of wealth in history. There will also be a significant number of employees in key financial positions retiring. This session will provide a roadmap for business owners to develop an exit plan including tax considerations such as gifting and estate planning. The session will discuss the importance of identifying value drivers to increase the value of your business. This session will also provide insight on developing a succession plan for key financial positions and will include strategies to get your entire leadership team aligned to achieve the owner's exit planning objectives.

3-3:15 pm

Break! Networking in exhibit area

3:15-4:30 pm

Conquering Compliance with Multiple Housing Programs – Part 2 of 2 – Amanda Lee Gross of E&A Team

TRACS 201- Part 4 of 4 – Nicole Scott, RightTracs

What is That Growing From the Wall? – Mary Carter-Myers and Kenny Coffee, Hays & Sons Complete Restoration

MOLD- an ugly word! What can your staff do, and when is it appropriate to call in the professionals? In this class we will discuss common types of mold found inside and outside our residents' units. Information covered includes the health effects, classifications of mold types, causes of and solutions for treating mold- specifically how maintenance can manage a mold situation.

Breaking News from the National RD Office, Bryan Hooper, USDA Rural Development National Office

This session will give attendees an opportunity to hear breaking RD news directly from the National Rural Development office. Bryan Hooper is the Deputy Administrator for USDA Multi-Family Housing. Attend this session to ask questions and get answers.

Disparate Impact – Angelita Fisher, Law Office of Angelita E. Fisher

In 2015, the U.S. Supreme Court opened the gates for Fair Housing disparate impact cases. Since then, landlords have seen a flood of these unintentional discrimination claims. From the HUD Guidance on the use of arrest and conviction records to occupancy standards, landlords have been inundated with news about disparate impact claims and the fear their policies are next to be challenged. In this session, we will discuss the latest disparate impact cases as well as those that may be on the horizon. We will also discuss how disparate impact cases are brought in an effort to understand the best steps to avoiding one. Join us for this in-depth discussion of disparate impact under fair housing laws.

4:30 pm 2017 Affordable Housing Conference & Annual Meeting Concludes