

The CONN NAHRO Connection

December 2024



CONN NAHRO Executive Director's Report



Dear CONN NAHRO Community,

I am excited to share some highlights from what has been an incredible year for our community. The energy and enthusiasm around CONN NAHRO remain strong as we continue working together to advance affordable housing and support professionals in the industry.

2024 CONN NAHRO Convention

Our 2024 CONN NAHRO Convention was a tremendous success! We had over 350 attendees, more than 20 sponsors, and over 45 exhibitors—truly a reflection of the dedication within our community. The opening keynote by Assistant Coach Tom Moore of the UCONN Men's Basketball team, fresh off their back-to-back championships, was both motivational and inspiring, setting the tone for the event. The educational sessions were highly engaging, and the networking opportunities allowed everyone to connect and share valuable insights. Thank you to all who attended and helped make it such a memorable event.

26th Annual John J. Kelly Memorial Golf Outing

On October 3, we held the 26th Annual John J. Kelly Memorial Golf Outing, and I'm happy to report we reached our maximum capacity of 128 golfers! If you missed out this year, be sure to sign up early for next year's event. We are also thrilled to announce that the tournament raised over \$14,000 for the CONN NAHRO Scholarship Fund, supporting the educational goals of young adults from subsidized housing programs across Connecticut. Congratulations to our winning team: Rick Leco, Doug Dinardo, Aaron Dinardo, and Nick Dinardo. A special shout-out goes to Troy LePage and Deb Olson for winning the longest drive competition, and to Lori Simoncelli and Chris Calabrese for their closest-to-the-pin victories.

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Commissioners Committee Members

Mitzy Rowe, Chair
Bristol Housing Authority

Laura Coleman, Vice-Chair
Webster Bank

Melissa Green, Secretary
Bristol Housing Authority

Laura LaMar
Bristol Housing Authority

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CONN NAHRO Executive Director's Report

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NAHRO Fellow Joe D'Ascoli

I would also like to extend a heartfelt congratulations to Joe D'Ascoli, who was recently named a NAHRO Fellow at the NAHRO conference in Orlando. This prestigious recognition highlights his exceptional contributions to the housing industry and his longstanding commitment to our community. Congratulations, Joe!



Joe D'Ascoli, NAHRO Fellow

CONN NAHRO Holiday Party

We're excited to host the CONN NAHRO Holiday Party at the Holy Trinity Greek Orthodox Church on December 13 at 5:30 p.m. This festive evening will feature delicious food, great company, and the perfect way to celebrate the season together.

As always, thank you for your continued support of CONN NAHRO. I look forward to seeing you all at our upcoming events and continuing the great work we've been doing throughout the year.

Wishing everyone Happy Holidays and a prosperous New Year!

Warm regards,

John Aliberti
Executive Director
CONN NAHRO



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2024 CONN NAHRO Annual Convention

Mohegan Sun – August 25-28, 2024



THE IMPORTANCE OF CORRECT UNIT REPORTING

Brian Alten, CPA; Assurance Market Managing Partner; BDO PHA Finance

Correct reporting of units can have significant impacts on various types of HUD compliance and financial reporting. It can also affect the amount of fee revenue that the central office cost center (COCC) earns. Public Housing occupied units, HUD approved vacant units, and special use units must be reported correctly to maximize public housing operating subsidy, fee revenue to the COCC and maximization the Management Assessment Subsystem indicator and the Capital Fund indicator of the Public Housing Assessment System (PHAS). Furthermore, reporting units correctly in the Voucher Management System (VMS) will maximize the administrative fees for the Section 8 programs and allow the COCC to earn more fees from the Section 8 programs.

A PHA should begin with the correct reporting of units in the Public & Indian Housing Information Center (PIC). Section 5.4 of [PIH Notice 2024-3](#) provides the latest guidance on the various types of unit reporting that can affect funding levels and their performance scores in PHAS and what a PHA must do in PIC to ensure units are reported accurately.

Let's begin with Public Housing and how unit reporting can affect operating subsidy, PHAS as well as fee revenue to the COCC. HUD Form 52723 is completed each year, for each Asset Management Project (AMP) to receive operating subsidy. HUD Form 52723 will be pre-populated with data that was submitted in PIC by the PHA. The PHA will be funded based on the number of eligible unit months, which primarily consist of occupied units, HUD approved vacancies and certain special use unit. If these units are not reported correctly in PIC, then the PHA will lose subsidy for these unit months that rightfully due to them.

HUD approved vacant units include:

- Undergoing modernization
- Court litigation
- Natural disasters
- Casualty loss
- Market conditions

Special use units include:

- Resident services
- Resident organization offices
- Self-sufficiency
- Anti-crime



PHAS currently consists of four indicators; Physical Assessment Subsystem (PASS), Financial Assessment Subsystem (FASS), Management Assessment Subsystem (MASS) and the Capital Fund Subsystem (CFP). Each indicator has a series of sub-indicators. Included in the MASS and CFP indicator is an occupancy sub-indicator. Both sub-indicators for occupancy are calculated differently. The occupancy sub-indicators represent over 21% of the possible score of 100 points of PHAS, so it is critical to report unit status correctly. The occupancy sub-indicator for MASS is calculated from the Financial Data Schedule (FDS) and this information is self-reported by the PHA and does not come from PIC. This sub-indicator measures the occupancy for the PHA's fiscal year, for each AMP, adjusted for HUD approved vacancies. So, if the PHA is not reporting correct information on the FDS for occupied and HUD approved vacant unit months, then the PHA can lose points. We typically see several PHAs not reduce unit months available by the number HUD approved vacancies, thus reducing the score for MASS indicator and the over all PHAS score. Even though this is self-reported by the PHA, the auditors will verify the calculations and leasing activity for occupancy and HUD approved units. HUD has starting cross referencing fees charged with leasing activity reported on the FDS to PIC.

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The Importance of Correct Unit Reporting

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The formula is:

$$\frac{\text{Unit Months Leased}}{(\text{Unit Months Available} - \text{HUD Approved Vacant Unit Months})}$$

The occupancy sub-indicator for CFP is calculated differently. This sub-indicator measures the PHA's occupancy rate as of the end of the PHA's fiscal year. This sub-indicator score is calculated from only the last PIC submission for, the PHA's fiscal year. The PHA needs to be strategic when submitting the last PIC submission since they have 60 calendar days from the effective date of any action recorded on line 2b of HUD Form 50058 (including MTW agencies). For example, a PHA is a December year-end, and the PHA had a lot of move outs from the AMPs in December and occupancy dropped. If the PHA did a submission in November with higher occupancy levels for the AMPs, then the PHA does not have to submit PIC in December because it would lower their score as long as it the PHA is in the 60-day window. This formula is different from the MASS occupancy sub-indicator that the PHA doesn't get the benefit of the HUD approved vacant units counts against the PHA for this indicator. This indicator is equivalent to HUD's Agency Priority Reporting Goal. The formula is:

$$\frac{\text{Total Occupied Units, special use \& non-assisted units}}{(\text{Unit Months Available} - \text{Non-Inhabitable Units})}$$

The chart below reports the difference between the MASS and CFP indicator calculations.

PHA Occupancy Percentage Calculations						
IMS/PIC Building and Unit Submodule: Unit Tenant Status Categories and Sub-Categories*	PHAS Management Assessment (MASS)		PHAS Capital Fund		HUD Agency Priority Goal (APG) Reporting	
	Numerator - UML	Denominator - UMA	Numerator	Denominator	Numerator	Denominator
1 Occupied-Assisted Tenant	✓	✓	✓	✓	✓	✓
2 Occupied-Employee	✓	✓	✓	✓	✓	✓
3 income	✓	✓	✓	✓	✓	✓
4 Occupied-Police Officer	✓	✓	✓	✓	✓	✓
5 Occupied-Unauthorized		✓		✓		✓
6 Vacant-Undergoing Mod	**			✓		✓
7 Vacant - Court Litigation	**			✓		✓
8 Vacant- Natural Disaster	**			✓		✓
9 Vacant- Casualty Loss	**			✓		✓
10 Vacant-Market Conditions	**			✓		✓
11 Non Dwelling- Special Use: Anti Drug Crime			✓	✓	✓	✓
12 Non Dwelling -Special Use: Self Sufficiency Activities			✓	✓	✓	✓
13 Non Dwelling- Special Use: Other Resident Activities			✓	✓	✓	✓
14 Non-Dwelling- Moving to Work			✓	✓	✓	✓
15 Non-Dwelling- Administrative	✓			✓		✓
16 Non-Dwelling-Resident Amenities	✓			✓		✓
17 Non-Dwelling-Authorized	✓			✓		✓
18 Demo-Dispo (Approved and vacant)						
19 Vacant/Vacant		✓		✓		✓

Source: HUD Accounting Brief #17

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The Importance of Correct Unit Reporting

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The COCC will charge management fees to the AMPs, Section 8 and other programs to offset expenses. The fees charged to the AMPs include a management fee, bookkeeping fee and asset management fee. The management fee is published each year based on geographic location of the PHA and the bookkeeping fee has been \$7.50 since the inception of asset management (2007). The calculation for both the management and bookkeeping fee is based on units leased and HUD approved vacant units each month either on the first day of the month or last day of the month multiplied by the fee amount. The PHA must be consistent with the day of the month for the entire fiscal year. The asset management fee is based on unit months available. The fee amount has been \$10 since per unit month available since the inception of asset management. The fee is payable to the COCC if the AMPs have Excess Cash from their prior fiscal year. Excess Cash is a HUD formula and be found in Chapter 6 of [HUD's Financial Management Handbook 7475.1, rev](#). The fees charged to Section 8 from the COCC include a management fee and bookkeeping fee. The management fee is the higher of \$12 per unit leased as of the first of the month or 20% of administrative fees received. The bookkeeping fee is \$7.50 per unit leased as of the 1st of the month. Even though this is self-reported by the PHA, the auditors will verify the calculations and leasing activity for occupancy and HUD approved units. HUD has starting cross checking fees charged with leasing activity reported on the FDS with PIC. The auditor should be checking this as well.

To ensure a PHA is receiving the correct administrative fee revenue to the Section 8 program, the reporting of units leased as of the first of the month in VMS is critical as well as maximizing their SEMAP Lease Up indicator. Even though this is self-reported by the PHA, the auditors and HUD will verify the units leased as of the 1st of the month.

A PHA can be viewed as a real estate management and development company. They are also owners of real estate. Their niche is low-income, elderly and disabled individuals. Unit reporting is very important for funding purposes as well compliance purposes as we discussed. Once HUD sees decreased occupancy it raises concerns because it tends to lead toward insolvency and low PHAS scores. Receiving the correct amount of subsidy, having the COCC charge the correct fees and proper reporting of units will help a PHA succeed financially and maintain compliance with HUD.

Brian Alten, CPA | Assurance Market Managing Partner BDO PHA Finance



Brian Alten has more than 20 years of experience in areas of accounting and financial advisory for Public Housing Authorities (PHAs) across the nation. Brian has provided tax credit financial consulting to his clients, as well as mixed finance development guidance and Capital Fund Financing Program (CFFP) infrastructure instruction. He has helped PHAs maximize both subsidy and Public Housing Assessment System (PHAS) scores.



26th Annual John J. Kelly Memorial Golf Outing

Chippanee Country Club, Bristol October 3, 2024



Chippanee Country Club

A VISION FOR THE FUTURE OF RESIDENT SERVICES COORDINATION: AN INTERVIEW WITH KATE CANTWELL

Marcus Smith, CHFA Director of Research, Marketing and Outreach

There's a quiet but profound shift happening within the world of resident services coordination, and Kate Cantwell, the new Executive Director of New England Resident Services Coordinators, Inc. (NERSC), is helping to lead the charge. After stepping into the role earlier this year, Cantwell has wasted no time in sharpening NERSC's focus on the broader importance of affordable housing within resident service coordination.



Cantwell's approach is one shaped by experience and a deep understanding of community engagement, most recently reflected in her work with the Federal Reserve Bank of Boston's Working Places Challenge in Newport, Rhode Island, which she describes a pivotal moment in her career.

As Cantwell points out, the resident services coordinator (RSC) field is evolving, and NERSC is committed to empowering RSCs to thrive in an increasingly complex environment. This means reducing burnout, fostering collaboration between RSCs and other housing staff, and helping to raise the voices of residents in policy discussions.

In an industry where the challenges often feel insurmountable—tight budgets, uncertain funding streams, and rising demands on resident services—Cantwell is focused on what's possible. It's a vision that's not just about housing, but about creating healthier, more resilient communities.

The following excerpts from our conversation have been edited for length and clarity.

Marcus Smith: Your experience includes leadership in initiatives like the Federal Reserve Bank of Boston's Working Places challenge. How have these experiences shaped your approach to strategic planning and community engagement at NERSC?

Kate Cantwell: My experience with Working Cities was transformative. There's a difference between more transactional community engagement versus having real representation, where the rules, the process, the meetings are structured for the resident voice to shine and come through.

[The latter] takes time. It requires trust building and transforming how we think about just having a meeting. I take that philosophy with me.

MS: You have expressed an interest in sharpening NERSC's focus on the broader importance of affordable housing in resident services coordination. What does that shift look like in practice?

KC: Our former executive director and our staff and Board did a phenomenal job preparing for this transition. Historically, conversations have happened in different pockets about RSCs' impact and how they can support residents across systems, whether it's with food stability or community health or access to green spaces. Part of NERSC's role is to work with others to demonstrate measurable impact of resident service coordination by highlighting the actual monetary benefits of having an RSC at your property.

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A Vision for the Future of Resident Services Coordination

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MS: That type of upstream thinking – looking at the big picture – seems like housing is somewhat uniquely positioned to tackle. How do you see the relationship between affordable housing and resident service coordination evolving, especially as housing challenges continue to intensify across Connecticut?

KC: The pandemic highlighted the divide many RSCs face. On the one hand, there are residents who are connected to someone, some organization where there is a relationship of trust and means of communication, where they can access more resources, versus residents who are more isolated and are not connected with community and have no understanding of what resources exist for them. The pandemic helped us recognize the importance of affordable housing partners working with RSCs to ensure people do not fall off the map. It's a critical relationship that needs to grow over the next two years.

MS: With that two-year timeframe in mind, what are some specific initiatives or partnerships NERSC is particularly excited about?

KC: NERSC has been the premier source for RSC training for some time and we know how to do it well. But over the past two or three years, about 1/3 of our conference attendees are new to the field. So at each annual conference, that's an influx between 125 to 200 individuals. That needs exploration and understanding. What is happening there in terms of the stability of the position? Is it burnout? Is it switching positions? And how can we support them when they leave the conference? Later this year, NERSC will release a new strategic plan that will look at investing in member experiences to help support resident service coordinators in between our amazing conferences.

Another central piece of our strategic plan is raising the voice of residents through our resident service coordinators -- building transformative relationships and sharing information from those at the front lines to policymakers at the local, state, and nation levels.

MS: Speaking directly to the CONN NAHRO audience, how do you envision strengthening relationships between NERSC and housing authorities across Connecticut to create more integrated services for residents?

KC: Resident service coordinators are not successful alone, and it takes building relationships with supervisors, property managers, facilities directors, and breaking down those silos that have naturally grown within the housing industry for people to understand how their positions are really not that far away from each other. Our goals and values are mutually aligned: we both want to bring housing stability to our residents, we want to them to have a high quality of life. And you need a stable team to make those goals reality.

NERSC can help decrease the isolation that some of our RSCs might feel in their work and bring resources to help them navigate the challenges they're having day-to-day on the ground. We're reaching an inflection point where the relationships need to be deeply embedded between policymakers at the top and those on the front lines who serve our residents, and NERSC wants to be a collaborator to help raise those voices up and build those relationships.





Upcoming Events

Look out for upcoming events!

NERC/NAHRO 2025 Mid-Winter Conference

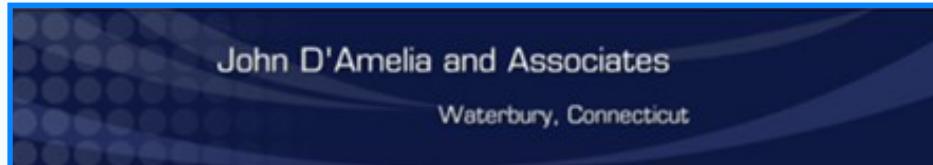
Mohegan Sun Sky Convention Center, Uncasville, CT

February 2-5, 2025

Get Involved and Become a CONN NAHRO Leader

If you are interested in serving on a CONN NAHRO committee, please contact John Aliberti at john@conn-nahro.org.

As a prerequisite to being considered to serve on a CONN NAHRO committee, you must be a current member in good standing with CONN NAHRO. Members are encouraged to volunteer their service by participating on a committee.



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