



Presents:

# Affordable Housing Conference

Tuesday, April 25 -  
Wednesday, April 26, 2017

Omni Jacksonville Hotel  
245 Water Street  
Jacksonville, FL 32202  
(904) 791-4841

## Up to 10 Contact Hours Available

**Featuring  
Nationally Known Speakers**

### Sessions Include:

- Fair Housing I & II
- Federal Funding and Policy Update
- Stress Free MORs
- Affordable Housing Preservation
- HUD Regulatory Panel Discussion
- Tackling Assets

### Description

This conference features educational sessions for staff of Affordable Housing Communities, PRACs, Home and Community-Based Services. Bring several staff and plan to attend all of the featured sessions. You will not want to miss this event – 1-1/2 days full of educational opportunities, networking, and fun.



### Question?

If you have any questions or would like additional information, please contact LeadingAge Florida at (850) 671-3700.

### Contact Hours

LeadingAge Florida is providing up to 10 contact hours of credit for nursing home administrators, nurses, and social workers.

**This conference is an exclusive standalone event for Housing Communities and is addition to the Annual Convention.**

**LeadingAge Florida**

1812 Riggins Rd, Tallahassee, FL 32308  
(850) 671-3700 | Fax: (850) 671-3790 | [www.LeadingAgeFlorida.org](http://www.LeadingAgeFlorida.org)

# Schedule of Sessions and Events

Tuesday, April 25

8:00– 8:30 am

**Registration Desk Open**

8:30 –10:00 am

## **“Senior Housing: Federal Funding and Policy Update”**

This session will give you the nuts, bolts, and backstory on what’s happening on the Hill and in the new Trump Administration on issues that impact affordable senior housing. We’ll cover politics, funding, and policy proposals; all with an eye on achieving LeadingAge’s housing policy priorities. The opportunities and challenges of the new environment are ripe for access and engagement by “real” providers and people.

### **Learner Objectives:**

1. Explain the latest developments in Congress and the Administration as they pertain to affordable senior housing
2. Describe the impact policy and funding proposals could have on senior affordable housing
3. Determine how they can engage with policymakers and their staff on senior affordable housing issues

**Speaker:** Linda Couch, *Director of Housing Policy and Priorities*, LeadingAge

10:15– 11:45 am

## **“Stress Free MORs – Maximizing Optimal Results”**

The 2016 reinstatement of Management and Occupancy Reviews (MORs) for most Project-Based Section 8 contracts has many anxious about their leasing and occupancy compliance. In this session, we’ll highlight specific new elements of your leasing and occupancy procedures that will be scrutinized during your MOR and help you develop your “To Do” list to avoid findings. Leave with a renewed sense of confidence that you can earn the rating you seek!

### **Learner Objectives:**

1. Develop a property-specific punch list to prepare your leasing and occupancy policies, forms, and files for an MOR review
2. Identify what regulatory changes have been released to the industry that you “didn’t know you didn’t know”
3. Incorporate efficient techniques to continually assess your leasing operation to ensure you include regulatory changes as they are released, into your everyday operations

**Speaker:** Jenny DeSilva, COS, TaCCs, CMH, *Director*, Blueprint Housing Solutions

11:45 am – 12:45 pm

**Lunch – Speaker:** TBD, Florida Housing Finance Corporation

## Tuesday, April 25 – Continued

12:45 – 2:15 pm

### “The Path to Affordable Housing Preservation”

Owners with aging HUD-funded affordable housing properties are often unsure of the best way to decide how the properties should be preserved and improved, and unsure of how to move forward once they decide on a plan for preservation. This session will discuss the purpose and reason for “preservation,” and will reinforce the tools that exist for HUD-funded properties to enhance and move preservation forward. This includes recent programmatic changes that add incentives for owners to preserve, and financing tools that focus on preservation. We will focus on tools specifically for 202 direct loan properties; HUD insured 236 properties, properties with Section 8, RAP and/or Rent Supplement rental subsidy. The session will also cover the process of creating consensus within the stakeholder team for a path forward for preservation. We will discuss board, staff, HUD and advisor roles in this process, and suggest methods for educating the team, and deciding on the best strategy to pursue. The final part of the session will discuss how to create the strongest team for a preservation transaction. We’ll discuss who the players are in any transaction, what their qualifications should be, and how to find those team members.

#### Learner Objectives:

1. We will explain the importance of “preservation” of HUD funded affordable housing properties in this subsidy scarce environment.
2. We will describe how to determine the best path to preservation, and how to create consensus among the stakeholders.
3. We will help owners understand how to create the team for a successful preservation.

**Speaker:** Gates Dunaway, *Principal*, The Gates Dunaway Group

2:30 – 3:30 pm

### HUD Regulatory Panel Discussion

**Speaker:** TBD, U.S. Department of Housing and Urban Development

3:45 – 5:15 pm

### “Tackling Assets at a HUD Senior Property”

Navigating through complex asset documentation is tricky and a less frequently exercised skill for many managers. This session is designed for staff that interview tenants during the certification and need to know the difference between cash value and market value, current income and imputed income, and when an asset becomes an income source instead. We will use real-life examples to illustrate different types of assets and their correct valuation while teaching the participants techniques to ensure assets are being identified by the households.

#### Learner Objectives:

1. Practice applying the fundamental calculation methodologies to calculate asset cash value and asset income
2. Learn how to identify undisclosed assets during the interview and verification process
3. Evaluate the thoroughness of your recertification documents related to the disclosure of assets by applicant and in-place households

**Speaker:** Jenny DeSilva, COS, TaCCs, CMH, *Director*, Blueprint Housing Solutions

5:30 – 7:00 pm

RECEPTION

Wednesday, April 26

8:00– 8:30 am

**Registration Desk Open**

8:30 –10:00 am

**Fair Housing: Part 1**

The first part of this session covers reasonable accommodations, the most common and challenging fair housing issue facing senior housing providers. During this session, best practices will be provided for responding to frequent reasonable accommodation requests including assist animals, assigned parking, and transfers. Procedures and forms for addressing these requests will be provided.

**Learner Objectives:**

1. Review the most common reasonable accommodation requests in senior communities including requests for assist animals, assigned parking spaces, and transfers
2. Summarize best practices and recommendations for developing a process to handle and document each request for reasonable accommodations

**Speaker:** Kathelene Williams, *President*, Williams & Edelstein, PC

10:15 –11:45 am

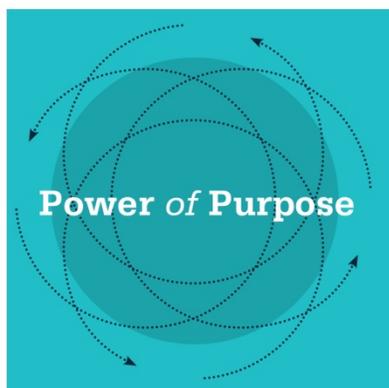
**Fair Housing: Part 2**

The second part of this session will address the legal issues involved with residents who hoard items in their apartments. The presenter will cover the management issues resulting from this difficult situation, and explain the steps to develop an action plan to correct the lease violations resulting from hoarding behavior.

**Learner Objectives:**

1. Explain reasonable accommodation issues that occur when attempting to correct a resident's hoarding behavior
2. Apply methods for documenting and addressing a resident's hoarding behavior while creating a defensible position for management should termination become necessary

**Speaker:** Kathelene Williams, *President*, Williams & Edelstein, PC



# SAVE THE DATE

**54<sup>th</sup> Annual Convention & Exposition**

**July 16-19, 2017**

**Omni Orlando Resort at ChampionsGate**

**1500 Masters Blvd**

**ChampionsGate, FL 33896**



**Omni Jacksonville Hotel | 245 Water St, Jacksonville, FL 32202 | (904) 791-4841**

Located just steps from the St. John's Riverwalk, the Omni Jacksonville Hotel is celebrating its recent renovation to all 354 guest rooms, lobby, meeting and restaurant space. Situated in the heart of downtown, this luxury hotel connects you with Jacksonville's most popular cultural and business districts. Relax poolside with dramatic views of the river and skyline or at the newly renovated J Bar and Juliette's.

**HOTEL RATE:** \$120 Single/Double

**HOTEL RESERVATION CUT-OFF DEADLINE: April 17, 2017**

**PLEASE NOTE:** Valet Parking for overnight is \$13 and Self-Parking is \$10.

**TO MAKE HOTEL RESERVATIONS:** Please call 1-800-THE-OMNI and ask for the LeadingAge Florida discounted conference rate.

**ADA:** If you require assistance to participate in this event, including special meal requests, please contact LeadingAge Florida at (850) 671-3700.

**CANCELLATIONS/REFUNDS:** There will be a \$50 administrative fee for each cancellation in writing. No refunds after **April 17, 2017**. However, substitutions will be accepted at no additional fee.

*To use your community's tax-exempt status, please provide a copy of your tax-exempt form. Payment must be made by the community by check or a credit card with the name of the community.*



# Affordable Housing Conference

## April 25 & 26, 2017

### Omni Jacksonville Hotel

**There are two ways to register:**

- 1) To pay by credit card, register online at [www.LeadingAgeFlorida.org](http://www.LeadingAgeFlorida.org) then go to Education / Calendar of Events.
- 2) To pay by check, fill out this form and mail with your check made payable to:  
**LeadingAge Florida**  
 1812 Riggins Rd, Tallahassee, FL 32308

To be PCI Compliant, LeadingAge Florida cannot accept faxed or emailed registration forms with credit card information. Registration forms will not be processed without payment. If you have any questions or need to acquire your username or password, please contact LeadingAge Florida at (850) 671-3700.

Community Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax Number: \_\_\_\_\_

**Please include an individual email address on all registrations.**

Registrant Name(s)	Title	Email
1. _____		
2. _____		
3. _____		

**Register Now. Please make copies of this form for additional registrants.**

**Registration Fees:**

Member Rate By April 24	Member Rate After April 24	
\$250 each x _____	\$300 each x _____	\$
Prospective Member Rate: By April 24	Prospective Member Rate After April 24	
\$350 each x _____	\$400 each x _____	\$
	<b>TOTAL:</b>	\$

**Cancellations/Refunds/Substitutions**

All cancellations must be in writing. A \$50 administrative fee will be charged for all cancellations. No refunds for cancellations will be made after **April 24, 2017**.

**LeadingAge Florida**

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