

## Oregon AHMA/Oregon CARH Spring Conference ~Schedule of Events~

Wednesday, Thursday, Friday, May 14/15/16, 2008

"Housing very much matters— to the individual, to the family, to the neighborhood, and to the nation."

—Millennial Housing Commission

### WEDNESDAY PLENARY SESSIONS, MAY 14, 2008

**These sessions are designed specially for onsite managers and maintenance staff, but everyone is welcome!**

#### 6:30 AM to 8:00 AM

- Conference Registration
- Breakfast

#### 8:00 AM to 8:10 AM

- Conference Welcome & Announcements

#### 8:10 AM to Noon (Break mid-morning)

- *The Challenges of Housing the Mentally Ill Tenant*
- **Trainers:** Jay Auslander, Project Respond; Royce Bowlin, Cascadia Behavioral Healthcare; Sharon Fitzgerald, Central City Concern; Dean Kaufman, Attorney at Law; Officer Betty Woodward, Crisis Intervention Team, Portland Police Bureau

#### Noon to 1:00 PM

- Lunch

#### 1:00 PM to 4:30 PM (Break mid-afternoon)

- *The Home Office vs. The Onsite Staff: Bridging the Gap with Good Communication*
- *Problem Tenants: How to Defuse Tense Situations*
- *Conflict Management and Dispute Resolution*
- **Trainer:** National Affordable Housing Trainer Karen Burkett

### WEDNESDAY EVENING MODERATED DISCUSSION SESSION WITH PIZZA AND BEER!

(Non-alcoholic beverages will also be available.)

**~LIMITED TO ONSITE STAFF ONLY~**

#### 7:00 PM to 9:00 PM

- *Coping Skills for Site Staff*— We'll socialize, share some of our on-the-job frustrations, and learn positive ways to reduce workday stress!
- **Moderator:** National Affordable Housing Trainer Karen Burkett

## **WEDNESDAY OWNER & MANAGEMENT AGENT SESSIONS, MAY 14, 2008**

**~For ALL Owners and Management Agents~**

### **6:30 AM to 8:00 AM**

- Conference Registration
- Breakfast

### **8:00 AM to 8:10 AM**

- Conference Welcome and Announcements

### **8:10 AM to Noon (Break mid-morning)**

- **JOINT SESSION FOR ALL OWNERS AND MANAGEMENT AGENTS** (We'll split up in the afternoon for RD-specific and HUD-specific sessions.)
- *Employee Retention Roundtable – Learn recruiting techniques as well as how continuing education and good benefits retain staff.*
- *Recognition of Your Site Staff* – A philosopher once said, “*Appreciation lasts longer than complaint.*” Could you own or manage housing projects without your site staff? Heck no! This session will focus on meaningful ways to recognize the dedication and hard work of your in-the-trenches site staff!
- **Trainer:** National Affordable Housing Trainer Karen Burkett

### **Noon to 1 PM**

- Lunch

### **1:00 PM to 4:30 PM**

- **HUD OWNER AND MANAGEMENT AGENT SESSION**
- *Annual ‘State of the HUD Union’ address* by our very own HUD Program Director, Michael Hayes
- *Oregon Housing and Community Services Presents:*
  1. *Opening the OHCS Preservation Toolbox* – If you're a current Section 8 owner, exploring renewal/rehab financing options, this is the session you've been waiting for. If you've thought in terms of "Pandora's Box" when you hear the term "preservation", why not come and hear a little bit about some new and old financing tools OHCS has available. This short but concise session will be an overview of current and planned programs, with an emphasis on timing issues that can affect the transactions, and ultimately, deals you might wish to negotiate to either sell or rehab your project.
  2. *Section 8 Contract Renewals* – This session has been planned to address unanswered questions from the April 18th Contract Renewal AHMA boot camp. HUD and OHCS staff will be present to continue the discussion and provide more details on options after initial renewal.
  3. *MOR: How to Prepare for Management & Occupancy Reviews* – The HUD Contract Administration (HCA) of the Asset & Property Management Division of OHCS monitors 122 Section 8 properties originally or currently state-funded. Owners and managers have questions, as HCA requirements for conducting annual Management & Occupancy Reviews differ in many ways from past reviews. The speakers will review differences in needs and HUD expectations, and will help you prepare for your next annual review. There will be time for discussion and questions.
- **Speakers:** Michael Hayes, HUD; Raquel Guglielmetti, NWRECC; Karen Clearwater, Katharine Daline, Keslie Joyce, Marlys Laver, Marcy Troxel, and Amanda Wilcox, Oregon Housing and Community Services

## ***Wednesday Owner/Management Agent Sessions, continued...***

### **1:00 PM to 4:30 PM**

- **RD** OWNER AND MANAGEMENT AGENT SESSION
- *Annual Oregon Rural Development Update* – RD MFH Director, Rod Hansen
- *Annual CARH/Capitol Hill Update* with National CARH Executive Director Colleen Fisher
- *Budget Preparation* – Geri Steward, Area Director, Rural Development
- *RD Roundtable Discussion* – This is your opportunity to discuss perennial issues of concern such as Prepayment. This was a very popular session at the 2007 conference, so don't miss it in 2008!
- **Speakers:** Rod Hansen, Rural Development; Colleen Fisher, National CARH; Geri Steward, Rural Development

### ***End of Wednesday Sessions...***

## **THURSDAY TRACKS AND TRADE SHOW, MAY 15, 2008**

**~FOUR Tracks FOR Lots of Training Variety~**

### **6:30 AM to 8:00 AM**

- Breakfast

### **8:00 am to 4:30 PM**

- ***Trade Show!*** Visit with our exhibitors and get your door prize card stamped.
- Product Showcase Presentations throughout the day

## **TAX CREDIT 101 TRACK, Thursday, May 15, 2008**

### **8:30 AM to 4:30 PM**

- (Breaks mid-morning and mid-afternoon; lunch served from noon to 1 PM)
- *This session will teach you the BASICS of Tax Credit management!*
  1. Terms and Concepts
  2. Required and Recommended Forms
  3. Applications, Screening Reports, Questionnaires
  4. Verifications, Certifications, and Putting It All Together (determining income)
  5. Beyond the Tenant File
  6. 8823 Reportable Items – How to Prepare for a Visit from Your State Compliance Officer
- **Trainers:** Theresa Easbey, Easbey Consulting; Tonya Evans, OHCS

## **HUD OCCUPANCY TRACK, Thursday, May 15, 2008**

### **8:00 AM to 4:30 PM**

- (Breaks mid-morning and mid-afternoon; lunch served from noon to 1 PM)
- *This session will include the following topics:*
  1. Income: what is included and excluded? How do you calculate annual income for part time and full time?
  2. Assets: what is an asset versus income?
  3. Expenses: what are allowable and disallowable medical expenses? How do you calculate anticipated expenses?
  4. Eligibility: learn how to determine if a potential tenant is eligible to live in the project.
  5. Zero Income tenants: are tenants reporting all of their income? Tips and helpful hints will be provided on interview techniques to ensure that tenants are reporting all of their income.
  6. Highlights to Change 2 of the 4350.3 Handbook (This will be in the form of a handout with some discussion specific to the most critical changes.)
  7. Prepare to have fun at this session! We will review case studies with challenging scenarios for new hires as well as experienced managers!
- This session is appropriate for new as well as seasoned managers.
- **Attendees are asked to bring a small calculator to the class.**
- **Trainers:** Rachel Elliot, Cascade Management; Melody Henricks, OHCS; Misty Schafte, HUD

## **RD OCCUPANCY TRACK, Thursday, May 15, 2008**

### **8:00 AM to 4:30 PM**

- (Breaks mid-morning and mid-afternoon; lunch served from noon to 1 PM)
- Morning Session
  1. How to Calculate Disposal of Assets (property/house)
  2. Verification Procedures
  3. How to Calculate Annualized Income
  4. How to Calculate Allowable Disability Deductions
  5. How and What is a Corrected Certification?
  6. Investigating the Discretionary Income of Zero Income Tenants
  7. Reasonable Accommodations and The ABCS of Calculating Aid Animal Expenses
- **Trainers:** Diana Chappell, Sherryl Gleason, Faith Harris, and Stan Rooney, Portland Rural Development Staff
- Afternoon Session
  1. Waiting Lists, including proper documentation of charges for application fees and proper documentation of move-out fees, charges, and return of deposits
  2. AFHMP: this session will address the common failure to complete or document completion of required outreach and marketing.
  3. Open Forum for YOUR RD Occupancy Questions!
  4. Budgets!
- **Trainers:** Jay DeLapp, Barb Fenili, Diann Parks, Geri Steward, and Linda Weiler, Rural Development Field Staff

## MAINTENANCE TRACK, Thursday, May 15, 2008

### 8:30 AM to 4:30 PM

- (Breaks mid-morning and mid-afternoon; lunch served from noon to 1 PM)
  - *This is a full day of **comprehensive training** for maintenance professionals.*
1. Basics of Being a Maintenance Technician
    - Hand-tool Requirement List
    - Expectations
    - Professionalism
  2. Daily Operations
    - Grounds Curb Appeal
    - Garbage Capacity
  3. Turnover
    - Tips and Tricks and Products
    - Wall Repair, Door Repair
    - Proven Processes
    - Time Management
    - Screen Repair
    - Vinyl Repair
  4. Electrical
    - Basic Systems
    - Types of Wire
    - Types of Connectors
    - Using a multi-meter: various kinds of multi-meters and testing continuity
    - Installing Common Switches
    - Installing Common Outlets
  5. Appliances
    - Washers: parts, repairs and installation
    - Dryers: parts, repairs and installation
    - Refrigerators: parts, repairs and installation
    - Dishwashers: parts, repairs and installation
    - Ranges: parts, repairs and installation
    - Garbage Disposals: parts, repairs and installation
  6. Plumbing
    - Basic Residential Systems: supply, drain, waste, & vent (DWV)
    - Pipe Installation and Repair: plastic and copper, galvanized, pex
    - Toilets: parts, repairs and installation
    - Faucets: parts, repairs and installation, as well as stems, cartridges, springs, and seals
    - Water Heaters: parts, repairs and installation and troubleshooting
    - Tubs and Showers: parts, repairs and installation and drain cleaning

Trainer: Zach Howell, Apartment Maintenance Institute

## THURSDAY EVENING SPECIAL EVENTS, MAY 15, 2008

### 6:00 PM to 6:30 PM

- No Host Bar

### 6:30 PM to 9:00 PM

- Annual Banquet Buffet
- Award Ceremony
- Door Prize Giveaway

### 9:00 PM to 10:30 PM

- The Quiz Game! Compete with your table-mates for wacky prizes...

## FRIDAY PLENARY SESSION, May 16, 2008

~Three excellent mini-sessions for everyone~

### 6:30 AM to 8:00 AM

- Breakfast
- Break mid-morning

### 8:00 AM to Noon

- *Smoke Free Housing*
  1. Reasons for Converting
  2. How to Convert
  3. How to Change Policies and Rules
  4. Dealing with Tenant Complaints
- **Trainers:** Jo Becker, Fair Housing Council of Oregon/American Lung Association of Oregon; Misty Schafte, HUD
- *Identify Theft in Housing Projects*
  1. Policies and Procedures for Site Office Security
  2. Electronic Security
  3. Shredding
  4. File Security
  5. Liability
- **Trainers:** Andy Hahs, Attorney at Law; Misty Schafte, HUD
- *Hot Issues in Fair Housing*
  1. Aid Animal Issues
  2. Domestic Violence (new laws in effect)
  3. Kid Rules
  4. Other New, Hot, Fair Housing Issues
- **Trainer:** Diane Hess, Fair Housing Council of Oregon

~CONFERENCE ENDS AT NOON~

Thanks for attending!

See you in 2009 at The Riverhouse Hotel in Bend, Oregon, April 22, 23, 24!!