

Signature Course Catalog

On-Site and Interactive Virtual Options*

2024



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SIGNATURE COURSE CATALOG

Table of Contents

I. Special Programs

- A. Introduction to Affordable Housing
- B. Understanding HOME
- C. Are You Ready for RAD?
- D. Public Housing Post RAD Conversion – How Do You Manage?

II. Blended Programs/All Programs

- A. Intro to Managing Blended Program (Layered) Properties
- B. Challenges of Managing Blended Program (Layered) Properties
- C. Blended Occupancy Challenges: Income-Eligibility-Rent-UA-Students
- D. The Student Rules: Keeping Them Straight
- E. Verifying and Calculating Income on Blended Properties
- F. Gig Income and New Age Assets – All Programs
- G. Handling a HUD MOR on a Tax Credit Property
- H. Transitioning to Tax Credits – Intro to Acquisition/Rehab
- I. Interviewing Applicants for Move-In - All Programs
- J. Working with Earned Income – All Programs
- K. Working with Unearned Income – All Programs
- L. Working with Assets – All Programs

III. HUD Program Compliance

- A. HOTMA – An Overview
- B. Are You Ready for HOTMA (comprehensive course)
- C. HUD Occupancy: Back to Basics (4350.3 Chapters 3, 4, & 5)
- D. HUD Occupancy: Back to Basics (4350.3 Chapters 3, 4, 5, 7, & 8)
- E. HUD Occupancy: Intermediate
- F. HUD Recertifications: Annual and Interim
- G. Terminations in Subsidized Housing: Assistance and Tenancy
- H. Understanding HUD Deductions
 - I. The Medical Deduction
 - J. Waiting List Management
 - K. Tenant Selection Basics
 - L. Understanding the HUD Utility Allowance: Baseline and Factor-Based
 - M. Interviewing Applicants for Move-in – It’s an Art and a Science
 - N. The Management and Occupancy Review (MOR): Ready, Set, Go!
 - O. EIV Income Discrepancies: Don’t Go Crazy – It’s a Tool!
 - P. EIV From A to Z: EIV Basics and EIV Advanced
 - Q. EIV Advanced: Investigating and Resolving Income Discrepancies
 - R. Is Your EIV Master File / Binder Ready for an MOR?
 - S. The Owner Handbooks – What You Don’t Know Can Hurt You
 - T. Mastering the HUD Rent Increase

SIGNATURE COURSE CATALOG

- U. How to Complete a HUD Budget-Based Rent Increase
- V. Special Claims
- W. Understanding 202/811 PRACs

IV. Low Income Housing Tax Credits

- A. Tax Credits from A to Z and/or 12-Hour SHCM Exam Prep Course
- B. Tax Credit Occupancy: Back to Basics
- C. LIHTC Occupancy: Basics and Beyond
- D. First Year Files and Compliance
- E. LIHTC “Unit Rules” Available Unit, Vacant Unit, Unit Transfer, etc.
- F. Section 42 Non-Compliance: How it Happens and How to Repair
- G. LIHTC Recertification In-Depth
- H. Master the Applicant Interview (Protect the Owner’s Credits)
- I. Self-Auditing Tax Credit Files
- J. Tax Credit Student Rules
- K. Tax Credit Restrictions and Set-Asides
- L. Tax Credit Calculations and Verifications
- M. Managing the LIHTC Utility Allowance
- N. Understanding the Section 42/Tax Credit Average Income Test

V. Fair Housing

- A. Fair Housing Timely Topics
- B. Fair Housing: The Letter and the Spirit
- C. Fair Housing Compliance: We’re All in This Together
- D. HUD’s New Guidance on Criminal Activity and Housing
- E. Implementing VAWA On Site
- F. Fair Housing Case Studies: Wait, Wait, Don’t Tell Me!
- G. Fair Housing Dos and Don’ts: You Decide
- H. Fair Housing: Maintenance Do’s and Don’ts
- I. How to Write an (Approvable) AFHMP
- J. How to Implement an AFHMP
- K. How to Affirmatively Market to the Least Likely to Apply
- L. 504 Coordination
- M. Fair Housing 101
- N. Reasonable Accommodations
- O. Accessibility Requirements
- P. LEP Plans and Fair Housing
- Q. Service and Emotional Support Animals
- R. Reduce Your Risk of Fair Housing Violations in Screening Applicants

SIGNATURE COURSE CATALOG

VI. Affordable Housing Extra

- A. COQ Made Easy [FREE]
- B. Service Programs on a Shoestring
- C. Best Practices for Communicating with Residents
- D. Communications Workshop for the Property Management Team
- E. Do the Right Thing - Property Management Ethics
- F. What do You Say After “Hello?” Mastering the Art of Conversation and Networking

Special Programs

◆ Introduction to Affordable Housing

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: This webinar is designed for owners, agents and others who are new to the industry or new to some of the programs. It will provide a general understanding of government and state affordable housing programs providing multifamily housing. Gwen will provide an overview of the following programs as well as their corresponding compliance agencies and also discuss how these programs work together to meet the housing needs of low-income people.

- HUD – (Section 8, 202, 236, etc.)
- LIHTC
- Rural Development
- HOME
- CDBG
- RAD
- Public Housing
- Bonds, and other

◆ Understanding HOME

On-Site: 4-hour Workshop

Virtual: One 4-hour session or two 2-hour sessions

Focus: The HOME program is unique. While some of its rules sound a little like Section 8 rules and others sound a little like tax credit rules, HOME compliance works very differently from both of those programs. So, whether you are dealing only with HOME or working on a project that combines HOME with tax credits or Section 8, understanding the HOME program is essential. This course covers HOME funding, Low HOME and High HOME Income limits and rents, "fixed" versus "floating" HOME units, leases, inspections, qualifying households, recertification requirements, calculating rent at recertification, documenting, and calculating income, effects of combining LIHTC HOME on income limits, rents, compliance, noncompliance, and concludes with a quiz to find out what you have learned.

◆ Are You Ready for RAD?

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: HUD's Rental Assistance Demonstration Program (RAD) – first initiated in 2012 - is a voluntary preservation program helping to stop the loss of affordable housing. It is also providing new opportunities for experienced affordable housing developers, managers, and agents from the private sector. As of October 2022, RAD has preserved 185,000 public housing units and 36,213 units of Rent Supplement, RAP and Mod Rehab by converting them to a Section 8 platform. In 2020, the 2800 202 PRACs and their 120,000 units became eligible to convert to RAD. As of October 2022, 34 202 PRACS totaling 1808 units have completed the process. Congress has now approved RAD conversions for the 28,000 units in 811 PRACS and HUD is working out the details for those unique projects. Learn or refresh on what RAD is and how it changes the properties that convert.

SIGNATURE COURSE CATALOG

◆ Public Housing Post RAD Conversion – How Do You Manage?

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: HUD's Rental Assistance Demonstration Program (RAD) is a voluntary preservation program helping to stop the loss of affordable housing. According to HUD, in October 2022, Public Housing authorities and their partners surpassed \$15 billion in construction investment since RAD's inception in 2013. PHAs across the nation leveraged RAD to obtain this financing for the construction, rehabilitation, and preservation of more than 185,000 deeply affordable rental homes. PHAs who converted their projects have opted for Project Based Vouchers (PBVs) or Project Based Rental Assistance (PBRA) – both of which are Section 8 platforms. With a conversion to PBVs things change. With a conversion to PBRA, everything changes. Learn or refresh on how your RAD conversion changes rules, procedures, and your management of the property.

Blended Programs / All Programs

◆ Intro to Managing Blended Program (Layered) Properties

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: HUD and RD are encouraging, and Owners are increasingly turning to the use of multiple funding programs to acquire and recapitalize affordable housing properties. This course provides an overview of the potential conflicts and challenges of managing such combinations. The course highlights key areas of difference among the compliance rules and processes managers encounter when owners mingle project-based Section 8, older HUD programs, Rural Development, HOME, Housing Choice Vouchers, Low Income Housing Credit, Tax-Exempt Bonds, and the Rental Assistance Demonstration (RAD) program.

◆ Challenges of Managing Blended Program (Layered) Properties

On-Site: 6-hour Workshop

Virtual: One 6-hour session or two 3-hour sessions

Focus: HUD and RD are encouraging, and Owners are increasingly turning to the use of multiple funding programs to acquire and recapitalize affordable housing properties. This session provides an in-depth review of the potential conflicts and challenges of managing such combinations and case studies to help participants think through and resolve typical problems they may encounter. The course covers more than 40 areas of difference among the compliance rules and processes managers encounter when owners mingle project-based Section 8, older HUD programs, Rural Development, HOME, Housing Choice Vouchers, Low Income Housing Credit, Tax-Exempt Bonds, and the Rental Assistance Demonstration (RAD) program.

◆ Blended Occupancy Challenges: Income-Eligibility- Rent-UA–Students

On-Site: 3 hours

Virtual: Two 90-minute sessions

Focus: An overview of the areas of difference when LIHTC, HOME, Section 8, Bond, and RD programs are blended plus a closer look at managing the differences in student eligibility rules, treatment of over-income households, and rent calculation.

SIGNATURE COURSE CATALOG

◆ The Student Rules: Keeping Them Straight

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: Every program has its own student rules - all can be confusing - both individually and when programs are combined. The webinar breaks down the rules for Section 8, LIHC, Bond, Rural Development, HOME, RAD, and other programs. A real-world practicality will be included as a sample of "Student Rule Challenges" are presented and solved throughout the course.

◆ Verifying and Calculating Income on Blended Properties

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: This course reviews the methods of verifying and calculating income for the Section 8, HOME, RD, and Tax Credit programs and highlights the differences that can and will produce different income calculations for each program. Includes Gig income and New Age Assets. When appropriate, information is customized to address state-specific requirements applicable to the anticipated attendees. We will also discuss documenting the file(s) and explaining to residents why you are asking them to sign conflicting income certifications.

◆ Gig Income and New Age Assets – All Programs

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: 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.

◆ Handling a HUD MOR on a Tax Credit Property

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: With so many HUD properties recapitalizing with tax credits, managers are now faced with state agency compliance audits as well as Management and Occupancy Reviews by the PBCA. This session will review the keys to a successful MOR and discuss the special issues that arise when your property is layered with tax credits. HUD's Management and Occupancy Review (MOR) final rule and a notice establishing MOR schedules is effective 9/1/2022. Find out how it will affect your blended property.

◆ Transitioning to Tax Credits – Introduction to Acquisition/Rehab

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: The owner informs you that she is adding a layer of tax credits to your Section 8 property to provide funds for capital improvements and modernization. "You already know how to do Section 8," she adds. "How hard could it be?" How does the change affect your residents, your applicants, and your management practices?

SIGNATURE COURSE CATALOG

◆ Interviewing Applicants for Move-In - All Programs

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: Whether your property is HUD, Tax Credit, RD, HOME or Bond, learn how to effectively and efficiently conduct the all-important applicant interview to ensure that assistance goes to families who are qualified and/or protect your owners credits. This course covers how to establish rapport, gain trust, and ask the right questions in the right way while ensuring a consistent scripted approach to prevent costly fair housing mistakes. Includes tips on interviewing applicants face to face, by telephone and via a virtual app and interviewing persons with various types of disabilities. Participants will apply what they are learning through in class polls on common situations they encounter.

◆ Working with Earned Income - All Programs

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: The 4350.3 Chapter 5 and Exhibit 5-1 define what is and is not income and whose income is included for all affordable housing programs. Methods of verifying and calculating, however, can and sometimes do differ from program to program and from state to state. This class takes an in-depth look at the types of earned income including methods of verifying and calculating for HUD, RD, Tax Credit and HOME. Includes Gig Income... Mini-quizzes and case studies are included. Students will need a calculator.

◆ Working with Unearned Income - All Programs

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: The 4350.3 Chapter 5 and Exhibit 5-1 defines what is considered unearned income for all affordable housing programs. Unlike other types of income, unearned income is included for all household members, regardless of their age. Methods of verifying and calculating unearned income can and sometimes do differ from program to program and from state to state. This class takes an in-depth look at the various types of unearned income and how they are handled in HUD, RD, Tax Credit and HOME. Includes New Age Assets. Mini quizzes and case studies will be included. Students will need a calculator.

◆ Working with Assets – All Programs

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: The 4350.3 Chapter 5 and Exhibit 5-2 define what is and is not an asset for all affordable housing programs. Methods of verifying assets and calculating income from assets, however, can and sometimes do differ from program to program and from state to state. This class takes an in-depth look at the various types of assets and assets disposed of for less than fair market value including methods of verifying assets and calculating income from assets for HUD, RD, Tax Credit and HOME. Includes New Age assets. Mini-quizzes and case studies are included. Students will need a calculator.

SIGNATURE COURSE CATALOG

HUD Program Compliance

◆ HOTMA – An Overview

On-Site: 1½ - 3 hours

Virtual: 2 – 3 hours

Focus: Once Owner Software is HOTMA compliant (sometime in 2024), HUD will implement the most comprehensive changes to the way HUD properties determine eligibility and calculate income and rent since 1981 when Congress raised the rent cap from 25% to 30% of Adjusted Income. The changes are expected to have a ripple effect on other affordable housing programs including Rural Development and the Low-Income Housing Tax Credit and HOME programs. Find out the most significant changes, what guidance HUD has provided to date, and when you will need to start following the new rules.

◆ Are You Ready for HOTMA?

On-Site: 8 hours

Virtual: two 4-hour sessions or three 3-hour sessions

Focus: On 9/29/23, HUD issued the long-awaited policy guidance on implementing HOTMA. Additional guidance is promised by the end of 2023. The course will include everything that is known about what, how and when to implement the numerous HOTMA changes, helpful resources, and tools, so that, regardless of what HUD does or does not do, after completing the course, you will be ready for HOTMA.

Topic 1: Income and Income from Assets – including fosters not counted in the income limit, new income exclusions, methods of calculation – means tested, streamlined, traditional, student financial aid – new definitions, changes to Section 8 exceptions, how to calculate for both Section 8 and other HUD programs)

Topic 2: Assets and Income from Assets- including new asset exceptions, asset threshold, non-necessary personal property, and method to calculate income from assets.

Topic 3: The Section 8 Asset cap - including two types, when and how to apply to residents and new applicants, exceptions, owner hardship policies.

Topic 4: Deductions and Allowances - including CPI adjustment, 10% medical and disability “deductible” – new tenants and existing tenant phase-in, owner hardship policies.

Topic 5: Annual Recertification – including new methods to do annuals, owner option for retroactive rent decreases, other issues regarding when rent and HAP increase or decrease.

Topic 6: Interim Recertification – including lease requirements, increases based on 10% change in adjusted income, how to determine, owner option on % change for decreased income, owner option on using EIV, changes and owner options regarding increasing rent when earned income increases.

Topic 7: Miscellaneous – New forms – leases, 50059, 9887 and 9887A, how and when to implement, De minimum errors – impact on owner, impact on tenants, suspension of EIV Income Discrepancy reports, new ways to verify SSN's.

◆ HUD Occupancy: Back to Basics (4350.3 Ch 3, 4, 5)

On-Site: 4-hour Workshop

Virtual: One 4-hour session or two 2-hour sessions

Focus: For newly hired managers or those with no HUD Multifamily experience as well as those needing a refresher course. This course highlights three key requirements of the 4350.3 Rev 1 Chg. 4 essential to the work of the property manager. Chapter 3 - Eligibility for Assistance and Occupancy, Chapter 4 – Waiting List and Tenant Selection, and Chapter 5 – Determining Income and Calculating rent. Mini-quizzes and case studies are included to reinforce the learning. Students will need a calculator.

SIGNATURE COURSE CATALOG

◆ HUD Occupancy: Back to Basics + 2 (4350.3 Ch 3, 4, 5, 7, 8)

On-Site: 6-hour Workshop

Virtual: One 6-hour session (30 min lunch) or two 2 ¾ -hour sessions

Focus: For newly hired managers or those with no HUD Multifamily experience as well as those needing a refresher. This course highlights 5 key requirements of the 4350.3 Rev 1 Chg. 4 that are vital to the day-to-day work of the property manager. Chapter 3 - Eligibility for Assistance and Occupancy, Chapter 4 – Waiting List and Tenant Selection, Chapter 5 – Determining Income and Calculating rent, Chapter 7 – Recertification, Unit Transfers, and Gross Rent Changes, and Chapter 8 – Termination.

Mini-quizzes and case studies are included to reinforce the learning. Students will need a calculator.

◆ HUD Occupancy: Intermediate

On-Site: 4-hour Workshop

Virtual: One 4-hour session or two 2-hour sessions

Focus: A deep dive into some of the more challenging aspects of HUD Occupancy including how to know your project type and why it matters, why 2-persons per bedroom is not always a “safe harbor”, applying the Section 8 student rule after move-in, the non-citizen rule, Gig income and New Age assets, verifying and calculating allowances, new guidance on fair housing issues related to criminal screening, application intake and managing the waiting list. Mini-quizzes and case studies are included to reinforce the learning. Students will need a calculator.

◆ HUD Recertifications: Annual and Interim

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: The requirement to do Annual and Interim Recertifications on a HUD property can feel like being chased by a freight train. The course will include:

- Annual Recertification basics including timing, procedures, notices to residents, and effective dates of changes in rent and HAP based on the resident’s cooperation or non-cooperation, the amount of time the owner has to process, owner caused delays, and the cooperation of verifiers, .
- Interim Recertification basics when tenants must report, owner’s responsibilities, effective dates of rent and HAP changes when tenant does and does not report timely.
- Tips on how to stay on top of the situation and drive your own train.

◆ Terminations in Subsidized Housing: Assistance and Tenancy

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: For subsidized tenants, there are three types of termination: termination of housing assistance, termination of tenancy, and termination of tenancy by the tenant. HUD devotes an entire chapter of the 4350.3 Rev 1 (Chapter 8) to this complex topic and understanding when and how to apply the rules can be confusing. This session clearly explains the differences between the grounds, procedures, and timelines for each type of termination and includes a discussion of how EIV discrepancies and repayment agreements come into play for both termination of assistance and termination of tenancy. Includes HUD’s December 1, 2023, proposed rule on 30-day notice for non-payment of rent.

SIGNATURE COURSE CATALOG

◆ Understanding the HUD Utility Allowance: Baseline and Factor-Based

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: Learn or refresh on how HUD's Utility Analysis base-line analysis works, how to calculate and apply a factor-based analysis in year's 2 and 3, and when and how-to phase-in decreases. Understand the significance of the tenant comment period for both baseline and factor-based analyses. Learn what HUD expects what you are and are not required to provide to HUD or the PBCA, and how to determine if the factor-based analysis is sufficient. **NEW:** On 7/15/22 HUD issued Treatment of Solar Community Credits on Tenant Utility Bill. This course will include the impact on when and how a Base-Line Analysis is required.

◆ The Medical Deduction

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: If I buy my medications in Mexico, can I deduct the trip as a medical expense? Using the handbook language, numerous examples and a case study, this course covers the who, what, why and how of the medical deduction. who qualifies, what does, does not, and/or sometimes counts, how to verify, how to calculate expense and the final deduction.

◆ Waiting List Management

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: Knowing the regulations and processes for managing a HUD property waiting list are put to the test in an MOR. More importantly, they are key to staying in compliance with Fair Housing laws. This webinar will review creating and maintaining, opening, and closing, placing families with disabled members, documenting changes, updating waiting list information, removing names from the waiting list, reinstating applicants to the list, and record-keeping. This course will reference the 4350.3 as well as HUD's Notice H 2014-16 Waiting List Administration and FHEO's April 2022 Guidance on Application Processing and Marketing.

◆ Tenant Selection Basics

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: This course focuses on the requirements of Chapter 4 of the 4350.3 as well as updated HUD requirements since issuance of the handbook in 2013. We will cover required, allowed, and prohibited screening practices, income targeting, preferences, implementing your occupancy standards when placing tenants, accepting applicants for the waiting list, approval for occupancy, rejecting applicants, assigning accessible units, and making sure tenant selection plan is in compliance with current HUD requirements. Handout includes a TSP checklist.

SIGNATURE COURSE CATALOG

◆ Interviewing Applicants for Move-in – It’s an Art and a Science

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: Learn how to effectively and efficiently conduct the all-important (and HUD-required) applicant interview to ensure that assistance goes to families who are qualified. Includes tips on how to conduct interviews in safe and compliant manner face to face, by telephone and via a virtual app. This course covers how to establish rapport, gain trust, and ask the right questions in the right way while ensuring a consistent scripted approach to prevent costly fair housing mistakes. Includes valuable tips on interviewing persons with various types of disabilities and how to respond to situations and conversations that commonly occur.

◆ Understanding HUD Deductions

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: Adjusted income is the basis for rent calculations for most tenants in HUD assisted housing. To get there, we must know the ins and outs of allowable deductions: the dependent deduction, the elderly/disabled Household deduction, and allowable expenses for childcare, disability, and medical. What counts, when and why and how do we calculate them? Participants will have the chance to calculate each of the deductions through several mini case studies.

◆ The Management and Occupancy Review (MOR): Ready, Set, Go!

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: The Management and Occupancy Review (MOR) is how HUD proves to taxpayers and to Congress that subsidy dollars are being wisely spent. So, whether performed by HUD, the PBCA, or CA, owners and managers are held to a high standard before, during and after the review. This course is an overview of what to expect, how to prepare, what to do at “zero hour” and how to respond when it is over. We will also review HUD’s new method for establishing MOR schedules and how HOTMA will affect your MOR scores in 2024.

◆ EIV Income Discrepancies: Don’t Go Crazy – It’s a Tool!

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: An introduction to the EIV income discrepancies. Simplifies what at first glance is very complicated. Shows participants how to “read” an Income Discrepancy Report – the Period of Income, Effective Date of Action, Actuals vs. Annualized Last Quarter, and how EIV comes up with those negative and positive numbers. Participants will learn the causes of false and true discrepancies and the basics of how to investigate and resolve them. **Once the** Owner’s software is HOTMA compliant (sometime in 2024), HUD says the use of EIV Income Discrepancy Reports will be suspended until HUD can make the logic of the reports work with HOTMA reporting rules. This course will be revised when that happens.

SIGNATURE COURSE CATALOG

◆ EIV From A to Z: EIV Basics and EIV Advanced

On-Site: Two-Day Workshop – 12 hours of training

Virtual: two 6 – 6½ hour sessions or four 3 – 3½ hour sessions

Focus: This two-part course is essential for property management professionals who work with the tenant certification and recertification process on HUD properties. After completing both parts of the course, you will have the information needed to master the HUD Enterprise Income Verification system. Students will need a calculator. Mini-quizzes, case studies and whiteboarding activities are included to reinforce the learning. The use of EIV will change after the Owner's software is HOTMA compliant. This course will be revised as needed to be compliant with HOTMA.

EIV Basics: History and purpose of EIV, how to gain access, responsibilities of EIV Coordinators, EIV Users and EIV non-users, security requirements, use of the reports in annual and interim recertifications, and the purpose, use, retention and how to read each of the nine EIV reports.

EIV Advanced: Starting with a Pretest/review of EIV Basics followed by investigating and resolving tenant income discrepancies and resident repayment agreements. Students will practice reconciling the EIV Income Discrepancy Report, identifying overpayments and underpayments of subsidy, and using third party verification to calculate what the tenant owes or has overpaid in rent.

◆ EIV Advanced: Investigating & Resolving Income Discrepancies

On-Site: 6-hour workshop

Virtual: 6- hour session or 2 3-hour sessions

Focus: Students will learn what EIV does and does not report, refresh and data match schedules EIV follows, how to read the EIV Income Report and Income Discrepancy Report, what HUD requires, how to investigate and resolve tenant income discrepancies – both valid and invalid, and the rules of resident repayment agreements. Students will practice reconciling the EIV Income Discrepancy Report, identifying overpayments and underpayments of subsidy, and using third party verification to calculate what the tenant owes or has overpaid in rent. Students will need a calculator. Mini-quizzes and case studies are included to reinforce the learning. Once the Owner's software is HOTMA compliant (sometime in 2024), HUD says the use of EIV Income Discrepancy Reports will be suspended until HUD can make the logic of the reports work with HOTMA reporting rules. This course will be revised when that happens.

◆ Is Your EIV Master File / Binder Ready for an MOR?

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: The EIV Master File / Binder is reviewed in your Management and Occupancy Review (MOR) and failure to maintain each required document for the required period of time will be a finding cited on the MOR report. The course will cover the documents that must be maintained for Owner/Coordinators, Secure Systems/EIV Users, Secure Systems/EIV Non-Users, Independent Public Accountants (IPAs), and the EIV Reports required to be maintained as well as EIV reports we recommend be retained as a Best Practice. We will discuss acceptable ways to organize the binder, which documents are never destroyed, and which documents must be destroyed and how often. The slides will include samples and/or screenshots of each document and report we discuss.

SIGNATURE COURSE CATALOG

◆ The Owner Handbooks – What You Don't Know Can Hurt You

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: There is more to owning or managing a HUD financed or subsidized property than knowing the 4350.3. This course highlights the key requirements of the “other” handbooks: HUD 4381.5 The Management Agent Handbook, 4350.1 Multifamily Asset Management and Project Servicing, 4370.2 Finance Operations and Accounting Procedures for Insured Properties, 4370.1 Reviewing Annual and Monthly Financial Reports. A must for owners and management agents who are new to HUD programs and a valuable refresher for those who are not.

◆ Mastering the HUD Rent Increase

On-Site: 6-hour Workshop

Virtual: One 6-hour session or two 3-hour sessions

Focus: Whether the property is a Section 8, Rent Supplement, 236, 202, 202/8, 202 PAC, 202/811 PRAC, 231, 221(d)3 or 221(d)3 BMIR, having an income stream that keeps pace with operating costs is key to ensuring the present and future viability of the property and its ability to provide the facilities and services the residents need. Takes an in-depth look at the various rent increase methods available to housing providers, which ones apply to which type of property, when and how the Owner can choose their method, what to submit with the request, and how to justify line-item increases over 5%. The course will be based on the current Section 8 Renewal Guide, Chapter 7 of the 4350.1 - – Processing Budget-Based Rent Increases, and proposed guidance from the Draft Revised 4350.1 Chapter 2.06 – Budget-Based Rent Adjustments. Participants will need a calculator.

◆ How to Complete a HUD Budget-Based Rent Increase

On-Site: 2 hours

Virtual: 2 hours

Focus: Budget-Based Rent Increase submissions are often delayed or denied due to the Owner submitting an incomplete package. In this course you will learn what, when and how to submit your package, how to respond to follow-up questions and requests from HUD, and when and how you can appeal a denial or partial denial of your request. The course is applicable to Section 8 projects who have renewed under Options 2 and 4, or Option 3 Lite are eligible as are some Option 5 projects. It is also applicable to 202 PACs, 202 PRACs, 811 PRACs and HUD-insured projects where a budget is usually the only way to obtain a rent increase.

◆ Special Claims

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: Are you leaving money on the table when you could be processing a special claim? HUD allows Section 8, 202/8, 202 PAC and 202/811 PRAC properties to submit requests for reimbursement of losses due to unpaid rent by the tenant, tenant damages or vacancy when the losses exceed the limited security deposits HUD allows owners to collect. This course will cover:

- How to make a Vacancy Claim for time lost between tenants.
- How to make a claim for Unpaid Rent, Tenant Damages and Other Charges left at move out.
- The difference between normal wear and tear and damages.
- How to calculate "life expectancy" of replaceable items and determine what can be billed to HUD.
- What forms and documentation are required.

SIGNATURE COURSE CATALOG

◆ Understanding 202/811 PRAC's

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: PRACs provide supportive housing for the elderly and for persons with disabilities. While many of the PRAC program rules resemble those of Section 8, there are many important differences. This course covers PRAC basics and shows to how to apply the special rules that govern them including income limits, eligibility rules, rules about adding an adult child, eligibility of a remaining family member, admitting over-income or non-elderly applicants, rent calculations, charges in addition to rent, marketing requirements, the 202 and 811 PRAC leases, security deposits, and termination. Citations from the 4350.3 Rev 1 are included for later reference.

Low Income Housing Tax Credits

◆ Tax Credits from A to Z and/or 12-Hour SHCM Exam Prep Course

On-Site: Two-Day Workshop – 12 hours of training

Virtual: two 6 – 6½ hour sessions or four 3 – 3½ hour sessions

Focus: Comprehensive Housing Credit management course with or without SHCM exam component. One key requirement for entry into the SHCM application process is 12 hours of housing credit education followed by sitting for and passing the SHCM exam. Gwen provides the required training in her Signature Course “Tax Credit SHCM Certification 12-hour Exam Prep Course” which includes instruction on the four areas of knowledge covered by the SHCM exam: program regulations, unit eligibility, applicant eligibility and certification, and documentation, record keeping, compliance monitoring and reporting. Gwen Volk provides this and other tax credit compliance courses for private companies as well as through the NAHMA approved providers. She has frequently been a trainer for NAHMA/NAA's SHCM on-line Blended Learning course. The Specialist in Housing Credit Management (SHCM) certification has been developed by the National Affordable Housing Management Association (NAHMA) especially for management professionals involved with properties developed and operated under the Low-Income Housing Tax Credit (LIHTC) program. The SHCM is designed by management professionals for management professionals to ensure they have attained the knowledge, experience and competence required to excel in the housing credit property management industry.

◆ Tax Credit Occupancy: Back to Basics

On-Site: 4-hour Workshop

Virtual: One 4-hour session or two 2-hour sessions

Focus: For newly hired managers or those with no Tax Credit experience as well as those needing a refresher course on the basics and the latest updates. This course translates the complexity of the program into plain language that even the newest manager can understand – answering the questions: “What is a housing credit?” and “How does it differ from other programs?” The course covers eligibility (including the student rule), the application process, calculating and verifying income, and maintaining compliance (including the available unit and vacant rules and annual recertification). Mini-quizzes, case studies and whiteboarding activities are included to reinforce the learning. Students will need a calculator.

SIGNATURE COURSE CATALOG

◆ LIHTC Occupancy: Basics and Beyond

On-Site: 6-hour Workshop

Virtual: one 6-hour session or two 3-hour sessions

Focus: Reviews six key requirements for managing an LIHTC property, plus qualifying applicants, maximum rents, annual recertification, and tips on maintaining compliance. Includes the rules for the next available unit, vacant units, and unit transfers as well as how fair housing rules about criminal background screening and VAWA impact LIHTC properties, and a preview of how HOTMA changes will affect the LIHTC program. Students will need a calculator. Mini-quizzes and case studies are included to reinforce the learning.

◆ First Year Files and Compliance

- On-Site: 1 – 1½ hours
- Virtual: 90 minutes

Focus: “First Year Files” are invaluable and irreplaceable. They are the proof that the tax credits awarded to investors, who provided millions of dollars to the property’s development, acquisition, or rehab, have been rightfully earned and justifiably taken. What are the First Year Files? What must they contain? Where should they be kept? How long should they be retained? And why are they so important? Come to this session and find out.

◆ LIHTC “Unit Rules” Available Unit, Vacant Unit, Unit Transfer, etc.

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: 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.

◆ Section 42 Non-Compliance: How it Happens and How to Repair

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: 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.

◆ LIHTC Recertification In-Depth

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: Recertification can be a difficult task for the tax credit property: “HUD isn’t paying my rent so why do I have to recertify?” This course takes an in-depth look at the requirements and timing of annual and other recertification’s as well as the 140% (Next Available Unit) Rule, unit transfers, and changes in household composition. We will also tackle the special challenges with resyndication and for properties with blended financing, and prevention and cures for delinquent annuals.

SIGNATURE COURSE CATALOG

◆ Master the Applicant Interview (Protect the Owner's Credits) [**See also Blended Occupancy – “Interviewing Applicants – It’s an Art and a Science”**]

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: The LIHTC program is unforgiving when an unqualified applicant is moved into a housing credit unit. There are no second chances once they have moved them in and a well-conducted interview is insurance against non-compliance. This course covers how the applicant interview is key to Section 42 “due diligence”, how to establish rapport, gain trust, and ask the right questions in the right way while ensuring a consistent scripted approach to prevent costly fair housing mistakes. Includes valuable tips on interviewing persons with various types of disabilities and how to respond to situations and conversations that commonly occur. Plus, interview methods and techniques during the pandemic.

◆ Self-Auditing Tax Credit Files

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: What is a “self-audit” and when should management do one? And how does the manager correct non-compliance if they find it? The instructor will highlight the issues monitoring agencies zero in on – incomplete applications, delinquent recertifications, insufficient documentation, income calculation errors, contradictions within a verification, underestimating anticipated income, late verifications and missing or late signatures. Participants will have a chance to try out their auditing skills.

◆ Tax Credit Student Rules [**See also Blended Occupancy – The Student Rules: Keeping Them Straight**]

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: What does the IRS have against full-time students? We will answer that question and examine the rules they impose and exceptions they make so the tax credit property doesn't turn into a college dorm. Some of these rules make sense and some of them do not. But to remain in compliance and protect the owner's credits, the manager must know how to apply them at move-in and what to do when an existing resident turns out to be (or into) a full-time student.

◆ Tax Credit Restrictions and Set-Asides

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: What makes a tax credit property a tax credit property? What makes a unit a tax credit unit? This session reviews the minimum set-aside and applicable fraction and the basic restrictions that every unit must meet to be qualified for credits: income, rent, utility allowance, habitability, and more.

SIGNATURE COURSE CATALOG

◆ Tax Credit Calculations and Verifications

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: Because we don't do "interims" on a tax credit tenant, anticipating annual income (especially on move-in) is critical. This means we need consistency and accuracy in interpreting verifications and calculating the income that is disclosed and not be tempted to over-calculate income "just to be safe". This session will cover best practices for verifications and calculations, what the IRS and the state monitoring agent require, and how to defend the calculations in a file audit. Includes Gig Income and New Age assets.

◆ Managing the LIHTC Utility Allowance

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: Making a mistake in the calculation or timing of a utility allowance and/or failing to analyze the effect on tenant rents can be costly. Participants will learn how utility allowances affect rents, what methods are allowed by the IRS and by the state, how they work, what makes the most sense for the property, If, when, why and how owners can or should change the method they are using, how other funding sources (HUD/RD/HOME) affect their choices, and management's responsibilities to the tenant, to the owner, and the monitoring agency.

◆ Understanding the Section 42/LIHTC Average Income Test

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: On October 12, 2022, the IRS published "final and temporary regulations" regarding the new minimum set-aside known as the Average Income Test. This set-aside is intended to allow for mixed-income housing and makes it possible to rent some units to individuals and families with incomes above 60% of median. We will explain how this set-aside differs from the 20 @ 50 and 40 @ 60 minimum set asides. You will learn how to calculate the set-aside and how the applicable fraction applies when this set-aside is in place. We will also review the most recent information from the states in your region regarding their requirements for the Average Income Set-Aside.

Fair Housing

◆ Fair Housing Timely Topics

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus Fair Housing investigation and enforcement is a high priority for FHEO this year. Join us for updates on HUD's guidance on application taking and marketing, the use of Criminal Records in screening, sexual orientation and gender identity, harassment - sexual, racial, religious, ethnic, and disability, status of reauthorized VAWA regs, service and other assistance animals, LEP, AFHMPs and more. Ask your burning questions on Fair Housing and get the answers you need in order to stay in compliance. *[Topics subject to change.]*

SIGNATURE COURSE CATALOG

◆ Fair Housing: The Letter and the Spirit

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: An interactive look back at the origins and evolution of Fair Housing laws in the United States: Where we are, how we got here, and where we might be headed. This is not a "nuts and bolts" course - it is a course designed to re-energize jaded housing providers to approach the rules in the spirit of the law. This course is interactive and engaging, including a "Price is Right" style intro with prizes, a matching game of dates and events, and an inspirational Power Point.

◆ Fair Housing Compliance: We're All in This Together

On-Site: 2 hours

Virtual: 2 hours

Focus: This session will help team members understand how what they do or say in performing their individual jobs can either prevent or result in fair housing complaints and/or violations. They will gain insight into how the perceptions and intentions of the applicant or resident and the team member set the stage for every encounter. They will learn to recognize how fair housing complaints and violations can result from their action, inaction, or delayed action as well as from their communication with applicants and residents verbally, nonverbally or in writing. With a focus on senior housing, each of these will be illustrated with real world examples relevant to team members at every level. Participants will be asked to determine what could have been done differently to avoid fair housing exposure. The session will conclude with a set of best practices and a take-home self-assessment.

◆ HUD's New Guidance on Criminal Activity and Housing

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: The U.S. Department of Housing and Urban Development (HUD) and its office of Fair Housing and Equal Opportunity (FHEO) are working to make it easier for people with a criminal record to find housing. In a memo sent out to staff on April 19, 2022, HUD Secretary Marcia Fudge instructed HUD Multifamily to review programs and policies that may "pose barriers to housing for persons with criminal histories or their families." On June 10, 2022, FHEO implemented previously issued Guidance on Applying the Fair Housing Act to Use of Criminal Records by Housing Providers. Since then, FHEO has provided training on Strategies for Addressing Discrimination: Housing Providers Use of Criminal Records to Fair Housing advocacy groups who investigate, test, and bring charges against housing providers. Find out how these initiatives will impact the way you do business. This course is applicable to all properties subject to the Fair Housing Act.

◆ Implementing VAWA On Site

On-Site: 2½ hour webinar or workshop / conference session

Focus: There's more to complying with the Violence Against Women Act than the forms. Owners, agents, managers, resident service coordinators, supervisors, and maintenance should attend this course. Here's what we cover:

- Domestic Violence: a Snapshot [the numbers, the pandemic, housing instability and poverty, and obstacles to leaving (why victims stay)]
- Complying with the Regulations [the protections, the forms, documentation issues, emergency transfers, guidance for HUD, RD, and LIHTC projects, and a review of state and local laws]

SIGNATURE COURSE CATALOG

- How to Handle the On-Site Issues [confidentiality, what to say and when to say it, when and how to be proactive, and 5 real-world “what would you do” scenarios representing challenges in both HUD/RD and Tax Credit properties focused on managers and maintenance staff]

◆ Fair Housing Case Studies: Wait, Wait, Don't Tell Me!

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: You've been trained ad nauseam on Fair Housing, right? So, let's put that book-learning to use with some real-life challenges every manager faces on site. The answer is right on the tip of your tongue. Or is it?

◆ Fair Housing Dos and Don'ts: You Decide

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: When a complaint is levied against a housing provider and makes it to a state or federal court, the way the court decides the case provides “takeaways” for the rest of us. The results of court cases are one of the best ways to find out the “Dos and Don'ts” of Fair Housing. We will review recent court cases about the four most frequent areas of complaint: disability, race, sex, and familial status. You will hear the case, make the call, and find out why the court decided the way they did. We will discuss the takeaways from each case on what we should and should not do in our day-to-day interactions with applicants and residents. The course includes a review of words and phrases to be avoided, used with caution, and those that are considered generally acceptable when advertising or speaking about your property.

◆ Fair Housing for Maintenance: Do's and Don'ts

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: Maintenance personnel come into contact with residents more than anyone else on site. And if they are not careful, their interaction with a resident or a potential resident could be misunderstood and result in a fair housing violation. This session includes a review of Fair Housing basics and explores typical situations where the well-intentioned maintenance person could be at risk of violating fair housing laws, ways to handle these without discriminating, and the importance of documentation. Includes a checklist for assessing whether company policies are providing the guidance a maintenance person needs plus a special focus on sexual harassment and communicating with persons with disabilities.

◆ How to Write an (Approvable) Affirmative Fair Housing Marketing Plan

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: Gwen has prepared, reviewed, and revised more than 500 AFHMP's for national companies and non-profits in numerous states for HUD, RD, and state agencies. Let her show you how it's done. This webinar takes the participants through the process of completing an AFHMP -- including learning how to navigate the Census Bureau's new tools - data.census.gov and geocoding.geo.census.gov. Learn how to interpret the data, identify community contacts, work with HUD, RD, or, when applicable, the state agency, and expedite the approval process. Includes guidance on how to do the 5-year review and document the file to prove it.

SIGNATURE COURSE CATALOG

◆ How to Implement an AFHMP

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: So, you've written your Affirmative Fair Housing Marketing Plan and HUD, RD or the State Agency has approved it. Now what? Bring the plan you are trying to implement, and we will dissect it together. Even if you didn't write the plan but are the one on site having to implement it, this course is also for you! This course reviews where the information came from and what it means, teaches you how to implement and train staff on the plan, keep, and organize records, track results, and prove ongoing compliance. We will also discuss how to perform the 5-year review of the plan, how to determine if the plan needs to be revised, and how to report the changes or lack of changes to HUD.

◆ How to Affirmatively Market to the Least Likely to Apply

On-Site: 1 – 1½ hours

Virtual: 90 minutes

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, 10.7% Did not disclose. 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. 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.

◆ 504 Coordination (with or without a named “504 Coordinator”)

On-Site: 1 – 1½ hours (Overview)
4-hour workshop (In-Depth)

Virtual: 90 minutes (Overview)
4-hour session or two 2-hour sessions (In-Depth)

Focus: Section 504 provides special protections to persons with disabilities who reside in HUD, HOME and RD funded properties. The penalty for non-compliance with Section 504 is loss of all federal funding. The responsibility for coordinating 504 compliance applies to all covered properties – regardless of the number of employees and regardless of whether or not one person has been named as the “504 Coordinator”. This course teaches the duties and responsibilities that properties must fulfill, who must perform them, how to define the specific role of a 504 coordinator when one is required, and how to manage 504 monitoring and compliance efficiently and effectively to prevent complaints and findings. 4-Hour Workshop version includes “Let’s Get Practical” where students complete checklists and worksheets on assigning 504 Coordination responsibilities and Reasonable Accommodation Policies and Procedures, developing a script for on-site employees, and reviewing available resources for decision making.

SIGNATURE COURSE CATALOG

◆ Fair Housing 101

On-Site: 4-hour Workshop

Virtual: One 4-hour session or two 2-hour sessions

Focus: Fair Housing basics plus problem solving exercises and activities. Includes (1) Why Fair Housing? (2) Protected Classes and Prohibited Activities, (3) Section 504, (4) Familial Status (5) Persons with Disabilities, and (6) Key differences among HUD, HOME, RD, LIHTC, and Conventional property rules.

◆ Reasonable Accommodation

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: Live-in aids, assistance animals, assigned parking . . . Fair Housing laws require owners/managers of rental housing to make reasonable accommodations for persons with disabilities when a rule, policy or practice interferes with the person's right to use and enjoy their dwelling or when an accommodation will enable the tenant to comply with the lease, house rules and other requirements of tenancy. What is reasonable? What is necessary? When and how do you verify that the accommodation is related to the disability? What are the limitations on the Owner/Manager responsibility to provide the accommodation? What do you do when lease violations persist or result from the accommodation? Get the answers to these and other questions by reviewing the applicable laws and applying them to real-world examples and solutions.

◆ Accessibility Requirements

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: Fair Housing Act Accessibility Guidelines (FHAAG), Americans with Disability Act Accessibility Guide (ADAAG), Uniform Federal Accessibility Standards (UFAS). Which ones apply to HUD? RD? Tax Credits?" Conventional Market Rate properties? What are the requirements for new construction? For existing properties? What makes a property "new"? And most importantly - which ones apply to my property and what does that mean for me?

◆ LEP Plans and Fair Housing

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: HUD reminds us that failure to provide meaningful access to persons with Limited English Proficiency could be a violation of the Fair Housing Act. Why? Because national origin is a protected class. HUD and RD properties are required to periodically look at the LEP profile of their residents and market area and update their plan to provide meaningful access. But even a tax credit or market rate property could be in trouble if LEP persons face barriers to applying. Come to this session and learn what to do about LEP.

◆ Service and Emotional Support Animals

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: The majority of Fair Housing complaints come from Persons with Disabilities, and 60% of those complaints are related to service and emotional support animals. Are you and your staff prepared to handle this challenging issue on site? Find out what HUD says about how to evaluate and approve or deny an applicant's or resident's reasonable accommodation request for an assistance animal, about on-line verifications and websites that sell ESA

SIGNATURE COURSE CATALOG

certifications. Learn the steps HUD recommends for processing requests for service versus emotional support animals, requests for animals “commonly kept in households” versus “unique animals” and requests for multiple animals. Learn how to apply the HUD recommendations and handle challenging issues with animals on site.

◆ Reduce Your Risk of Fair Housing Violations in Screening Applicants

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: Violating the fair housing laws does not require an intent to discriminate against a protected class. If the result of the application of your current policies is judged to have a discriminatory effect, good intentions will not save the day. The office of Fair Housing and Equal Opportunity (FHEO) is laser focused on disparate impact discrimination centering around criminal screening, nuisance ordinances, crime-free programs, domestic violence, and restrictions on sources of income. Meanwhile, 56% of all fair housing complaints filed by tenants and federally funded private agencies are around disability. Learn how your organization’s policies and procedures can be updated to reduce your risk of violating fair housing laws. Attendees will learn how to revise their policies and procedures to minimize risk, provide tools for team members to help them avoid fair housing pitfalls, and ensure consistency and fairness in taking and processing applications.

Affordable Housing Extra

◆ COQ Made Easy [FREE]

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: Do you have an unfinished Communities of Quality application under a pile on your desk? Have you been procrastinating on even starting one? This workshop takes the mystery, fear, dread, and anxiety out of the COQ application process. Learn how to:

- (1) pre-qualify your property before starting the paperwork,
- (2) identify categories where you may be lacking,
- (3) develop a strategy to obtain the points you need, and
- (4) set up a "who does what, when & how" schedule with a target date for submitting your application.

◆ Service Programs on a Shoestring

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: Not everyone is lucky enough to have a professional service coordinator on staff. Nor can all properties afford to hire an outside service contractor to coordinate their activities. Tax credit properties and bond properties generally come with a requirement for programs to enrich the quality of life of residents but generally do not have budgets that provide much to invest in such things. Take it from someone whose properties won two national awards- largely for their outstanding service programs - without benefit of large budgets or professional service coordination: You too can-do quality programs on a shoestring. **BONUS:** Participants will receive access to Gwen’s “Best Ideas List” with more than 500 no-cost, low-cost programs and activities proven to be successful by your fellow affordable housing managers nationwide. Includes ideas for resident engagement during COVID and beyond.

SIGNATURE COURSE CATALOG

◆ Time Management and Accountability

On-Site: 1 – 1½ hours

Virtual: 90 minutes

How can we manage our time and “get stuff done” with so many things beyond our control? Supervisor and agency-imposed deadlines, the ever-changing HOTMA roll-out, and applicants, residents, coworkers, and our own family members interrupting us morning, noon and night? There is hope! Learn from the trainer and from each other how to get your work (and life) in order.

◆ Best Practices for Communicating with Residents

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: Communication is a skill and an art - especially when it comes to having to communicate complicated and sometimes unpleasant realities to the resident of an affordable housing property. Role playing, shared success stories and rules for keeping your cool, participants will learn how to come out an ally instead of an adversary to those residents that have a lot of "issues".

◆ Communications Workshop for the Property Management Team

On-Site: 6-hour Workshop

Abbreviated Conference Format: two sessions in 60-, 75-, or 90-minute segments*

This course is not available in a virtual format.

Focus: This highly interactive course is for everyone – property managers, maintenance staff, compliance directors, and executives. Join us for a day of learning and fun! For the better part of every day, we are communicating to and with others. Whether it's interviewing applicants, addressing resident lease violations, interacting with coworkers, listening to a family member or the look we give the cat, it all means something. The workshop will help participants understand the different methods of communication and how to make the most of each of them. These strategies will provide a great benefit for the affordable housing management company and its staff at every level. In this class we will identify barriers to communication and how to overcome them, develop and practice our non-verbal communication skills, learn how to listen actively and effectively and ask good questions, read body language, better communicate with persons with disabilities, and much more. *Contact us for more information on the abbreviated conference format.

◆ Do the Right Thing - Property Management Ethics

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: Doing the right thing is not always obvious and frequently is not easy. Subscribing to a professional “code of ethics” is important but understanding and applying that code to real world situations requires study and practice. This course goes beyond the codes with straight talk about doing the right thing.

SIGNATURE COURSE CATALOG

◆ What Do You Say After “Hello?” - Mastering the Art of Conversation and Networking

On-Site: 1 – 1½ hours

Virtual: 90 minutes

Focus: Engaging in interesting, memorable small talk is a daunting task for most people. How do you know what to share and when to share it? How do you know what topics to avoid? How do you become an engaging converser? Most experts propose a simple three-level framework that you can use to master the art of conversation. Identifying where you are and where you should be is not always easy, but having an objective outline can help you stay out of sticky situations. We will also share some handy networking tips that will help you get conversations started.