Signature Course Catalog

On-Site and Interactive Virtual Options*

2026

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INFOCUS, INC.

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I. HUD Program Compliance

HOTMA for HUD Multifamily - An Overview 90-minute webinar or conference session

Focus: On 1/1/2027 (assuming Owner software is HOTMA compliant) HUD will start enforcing 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. Find out the most significant changes, what guidance HUD has provided to date, and how to start following the new rules.

Are You Ready for HOTMA? 9 hours or 6 - 90-min webinars or 1.5 days in person

Focus: HUD has postponed mandatory HOTMA enforcement until January 1, 2027, but the statute's effective date of January 1, 2024, has created an uneven and confusing transition period for HUD-assisted properties. While most Owners have not implemented HOTMA changes pending HUD enforcement and updated TRACS software, some Owners have adopted select provisions—often without system support—and PBCAs have issued inconsistent guidance, particularly regarding changes to income and asset definitions. HUD properties layered with LIHTC face additional compliance challenges due to differing implementation timelines.

This course focuses on what Owners and agents of HUD Multifamily properties need to understand now: what HOTMA requires, what HUD has deferred, what may be implemented early, and what should wait until HUD systems and enforcement are in place. The 9-hour session reviews key HOTMA changes (see the six topics below), available resources, and practical preparation strategies so participants can move forward with clarity and reduced risk. This training reflects current HUD guidance as of the presentation date; final implementation decisions must follow HUD and PBCA-issued written instructions and system readiness. For a detailed description of the Topics included in this comprehensive training, refer to the six sessions in the Bite-Sized HOTMA Series below.

Bite-Sized HOTMA Webinar Series

Topic 1: Income Rules
Including foster payments not counted toward income limits; new income exclusions; calculation methods (means -tested, streamlined, traditional); student financial aid changes; new definitions; Section 8 exceptions; and calculating income for Section 8 and other HUD programs.

Topic 2: Asset Rules
Including new asset exclusions, the asset threshold, non-necessary personal property, and methods for calculating income from assets.

Topic 3: Allowances and Deductions
Including CPI adjustments; the 10% medical and disability deductible; phase-in rules for new and existing tenants; and owner hardship policies.

Topic 4: Annual Recertification
Including new methods for completing annual recertifications; owner options for retroactive rent decreases; and timing issues related to rent and HAP increases or decreases.

Topic 5: Interim Recertification
Including lease requirements; increases based on a 10% change in adjusted income; how to determine the change; options for decreases in income; use of EIV; and changes related to rent increases when earned income rises.

Topic 6: Section 8 Asset Restrictions, EIV and Other HOTMA Changes
the two types of caps, when and how they apply to applicants and residents. Including new and revised forms (leases, HUD-50059, HUD-9887 and 9887-A); when and how to implement them; de minimis errors and their impact on owners and tenants; suspension of EIV Income Discrepancy Reports; and new methods for verifying Social Security numbers.

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Basic HUD Occupancy - an Overview 90-minute webinar or conference session

Focus: Attendees will gain a foundational understanding of:

- Program Eligibility
- Project Eligibility
- Verification of Eligibility Factors
- Best Practices for Tenant Interviews.
- Fundamentals of Expenses and Deductions
- Pending HOTMA Changes

HUD Occupancy: Back to Basics 4 hours in 2 2-hour webinars or 4 hours in person workshop

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 essential to the work of the property manager - eligibility, waiting list and tenant selection, and determining annual Income. Mini-quizzes and case studies are included to reinforce the learning. Students will need a calculator.

HUD Occupancy Essentials: 4350.3 Rules + HOTMA Preview 2 3-hour webinars or 6-hour workshop in person

Focus: This course covers the 4 key requirements vital to effective compliance management of HUD property - eligibility, waiting list and tenant selection, determining annual and adjusted Income, annual and interim recertification. Mini-quizzes and case studies are included to reinforce the learning. Students will need a calculator.

Recertifications: Annual and Interim 90-minute webinar or conference session

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 must 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 90-minute webinar or conference session

Focus: For subsidized tenants, there are three types of termination: termination of housing assistance, termination of tenancy by the owner, and termination of tenancy by the tenant. 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.

Evolving Eviction Rules: Non-Payment Compliance with the CARES Act and HUD's 30-Day Notice - Updated for the Deregulation Mandate 90-minute webinar or conference session

Focus: This course explores how to manage non-payment of rent in properties covered by the CARES Act and HUD's new 30-day notice rule—both now shaped by the current Administration's Deregulation Mandate. Learn how the two rules differ, overlap, and what the real implementation timelines are. Using real-world examples, we'll walk through the legal notice process and compliance steps. Whether you manage HUD-assisted, federally backed, or mixed-finance properties, you'll leave with practical tools to navigate today's shifting eviction landscape.

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Understanding the HUD Utility Allowance: Baseline and Factor-Based 90-minute webinar or conference session

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.

Understanding HUD Deductions 90-minute webinar or conference session

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, why, and how do we calculate them? Participants will have the chance to calculate each of the deductions through several mini case studies.

The Medical Deduction 90-minute webinar or conference session

Focus: If I buy my medications in Mexico, can I deduct the trip as a medical expense? Using HUD guidance, 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.

Mastering HUD Multifamily Rent Calculations 90-minute webinar or conference session

Focus: If you're relying on the software to do the math, you may be missing the "why"—and that leaves you unable to explain to tenants how their rent was calculated. This hands-on session breaks down the key components of rent calculation under HUD Multifamily programs, including Section 8, 202/8, 202 PRAC, 811 PRAC, and Section 236. You'll learn the difference between TTP, Tenant Rent, Utility Reimbursement, and HAP; how utility allowances affect rent under Section 236; and how to implement both temporary and long-term hardship exemptions. You'll also put your skills to the test with real-world scenarios and four calculation exercises. Stop relying on the system—and start understanding it.

Waiting List Management 90-minute webinar or conference session

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 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 90-minute webinar or conference session

Focus: This course focuses on compliance with HUD's regulations on tenant selection. 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.

Live-in Aides: Compliance Made Clear 90-minute webinar or conference session

Focus: This course provides a comprehensive overview of the rules and regulations governing Live-In Aids in HUD housing as outlined in the HUD Handbook 4350.3. Participants will gain a clear understanding of eligibility requirements, documentation processes, and compliance standards necessary to ensure proper application of HUD policies. Through interactive examples and case studies, this course will equip learners with the knowledge to confidently address Live-In Aid-related issues in HUD housing management.

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Interviewing Applicants for Move-in - It's an Art and a Science 90-minute webinar or conference session

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 people with various types of disabilities and how to respond to situations and conversations that commonly occur.

The Management and Occupancy Review (MOR): Ready, Set, Go! 90-minute webinar or conference session

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 Hours" 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 From A to Z 12 hours in 4 3-hour webinars or 2 days in person workshop

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 and case studies are included to reinforce the learning.

> **EIV Basics**: (6 hours) 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.
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> **EIV Advanced**: (6 hours) Investigating and resolving tenant income discrepancies - both valid and invalid, resident repayment agreements, and the master file.

EIV Income Discrepancies: Don't Go Crazy - It's a Tool! 90-minute webinar or conference session

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 produces 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.

Is Your EIV Master File / Binder Ready for an MOR? 90-minute webinar or conference session

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 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 Owner Handbooks - What You Don't Know Can Hurt You 90-minute webinar or conference session

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.

Navigating Section 8 Contract Renewal Options 90-minute webinar or conference session

Focus: Designed to guide multifamily property owners and managers through the essential processes and options for renewing Section 8 Housing Assistance Payment (HAP) contracts. This course will cover the six primary renewal options, key documentation requirements, and practical tips for a smooth renewal process. With a focus on real-world applications and common challenges, participants will gain a clear understanding of how to maintain compliance while maximizing the benefits of Section 8 contracts. Downloadable resources are included to enhance learning and provide actionable insights.

Rent Comparability Studies Made Simple 90-minute webinar or conference session

Focus: If "RCS" makes your eyes glaze over, this webinar is for you. In just 90 minutes, we'll break down Rent Comparability Studies into plain English and show you why they matter for your Section 8 contract renewals.
You'll learn:

- What an RCS actually *is* (and isn't)
- Why HUD requires it—and what they're looking for
- How appraisers choose comps and make adjustments
- What can slow down or derail your rent approval
- What *you* can do to help the process go smoothly

Whether you're a property manager, owner, or compliance pro, you'll walk away with the confidence to read, request, and respond to Rent Comparability Studies with clarity and purpose

Mastering the HUD Rent Increase 6 hours in 2 3-hour webinars or 6 hours in person workshop

Focus: Whether the property is Section 8, 236 IRP, 202/8, 202 PAC, 202/811 PRAC, 231, 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 and the 4350.1 chapter on Processing Budget-Based Rent Increases Participants will need a calculator.

How to Complete a HUD Budget-Based Rent Increase 3-hour webinar or conference session

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 been 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 90-minute webinar or conference session

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 damage.
- How to calculate "life expectancy" of replaceable items and determine what can be billed to HUD.
- What forms and documentation are required.

Understanding 202/811 PRAC's 90-minute webinar or conference session

Focus: PRACs provide supportive housing for the elderly and for people 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 you 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.

Can My Kid Move In? - Understanding Adult Children in HUD Elderly Properties 90-minute webinar or conference session

Focus: Adult children moving into elderly housing is one of the most misunderstood and frequently mishandled situations in HUD-assisted properties. This focused session tackles the tricky terrain of when, how, and if adult children can reside in units governed by HUD elderly housing rules, including 202 PRACs, 202/8, and Section 8 elderly properties. This course breaks down:

- The difference between a household member and a live-in aide
- What happens when an adult child moves in at initial occupancy
- Rules and restrictions when they move in after initial occupancy
- Whether an adult child can remain in the unit after the qualifying tenant leaves or dies
- When and how a live-in aide can be converted to a tenant - and when they cannot
- What documentation and approvals are required to stay compliant

We'll review real-life scenarios, HUD guidance, and practical tips to help managers confidently handle these delicate situations while protecting program integrity and minimizing risk. Whether you're dealing with pushy adult children, compassionate exceptions, or just trying to figure out what HUD will and won't allow, this class will give you the clarity and tools you need.

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II. Low Income Housing Tax Credits

HOTMA: An Overview of Tax Credit Properties (General or State - Specific) 90-minute webinar or conference session

Focus: An introduction to HOTMA and its Impact on Tax Credit Occupancy including how HOTMA affects Tax Credit properties such as changes to income and asset inclusions and exclusions and calculation methodologies and tenant income verification requirements. The course includes recommendations on how combined funding properties can best navigate the changes. The class includes an overview of what the various states are doing to implement and comply with HOTMA. The class can be state specific for groups who are working in a particular state that has totally implemented HOTMA at the time of the course offering.

Housing Credit Management - with or without SHCM Exam 3 4-hour webinars or 2-days in person

Focus: Comprehensive Housing Credit management course for those wanting a practical understanding of the tax credit program including program regulations, unit eligibility, applicant eligibility and certification, documentation and record-keeping. Available as a SHCM Exam Prep course meeting the 12-Hours course work requirement of NAHMA/NAA's prestigious certification program.

Tax Credit Occupancy: Back to Basics 4 hours in 2 2-hour webinars or 4 hours in person workshop

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

Tax Credit Occupancy: Intermediate 6 hours in 2 3-hour webinars or 6 hours in person workshop

Focus: Reviews six key requirements for managing an LIHTC property, plus qualifying applicants, 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, Mini-quizzes and case studies are included to reinforce the learning.

First-Year Files and Compliance 90-minute webinar or conference session

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 90-minute webinar or conference session

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.

LIHTC Recertification In - Depth 90-minute webinar or conference session

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 re-syndication and for properties with blended financing, and prevention and cures for delinquent annuals.

Self-Auditing Tax Credit Files 90-minute webinar or conference session

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 Calculations and Verifications 3-hour webinar or conference session

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.

Section 42 Non-Compliance: How it Happens and How to Repair 90-minute webinar or conference session

Focus: The IRS 8823 (Noncompliance) Form 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.

Understanding the Section 42/LIHTC Average Income Test 90-minute webinar or conference session

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.

Managing the LIHTC Utility Allowance 90-minute webinar or conference session

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.

Master the Applicant Interview (Protect the Owner's Credits) 90-minute webinar or conference session

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 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. It also includes valuable tips on interviewing people with various types of disabilities and how to respond to situations and conversations that commonly occur.

III. Blended Programs / All Programs

Intro to Managing Blended (Layered) Properties 90-minute webinar or conference session

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.

Blended Occupancy Challenges: Income – Eligibility - Rent-UA - Students 90-minute webinar or conference session

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.

Challenges of Managing Blended (Layered) Properties 6 hours in 2 3-hour webinars or 1 day in person

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.

Transitioning to Tax Credits - Introduction to Acquisition/Rehab 90-minute webinar or conference session

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?

The Student Rules: Keeping Them Straight — Now with Major HOTMA & Section 8 Income Rule Changes 90-minute webinar or conference session

Focus: Student eligibility rules have always been confusing — but now the income side of the equation has shifted. HOTMA revised how student financial assistance is counted as income for non-Section 8 programs, and Congress has now removed the long-standing Section 8 financial aid income provision, bringing Section 8 in line with the HOTMA standard.

Because every program still has its own student rules, confusion remains — especially in blended properties. This webinar clearly breaks down the student requirements for Section 8, LIHTC, Bond, Rural Development, HOME, RAD, and other programs, with a strong focus on what changed, what did not, and where owners continue to get tripped up. Real-world “Student Rule Challenges” will be presented and solved throughout the course.

Working with Earned Income - All Programs (Blended or Not) 90-minute webinar or conference session

Focus: 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. It also includes Gig Income, Mini-quizzes and case studies. Students will need a calculator.

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Working with Assets - All Programs (Blended or Not) 90-minute webinar or conference session

Focus: Methods of verifying assets and calculating income from assets, 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.

Working with Unearned Income - All Programs (Blended or Not) 90-minute webinar or conference session

Focus: Unlike other types of income, unearned income is included for all family 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 Social Security, Pensions, Child Support, Student Financial Aid and more.

Gig Income and New Age Assets - All Programs (Blended or Not) 90-minute webinar or conference session

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 90-minute webinar or conference session

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.

Interviewing Applicants for Move-In - All Programs 90-minute webinar or conference session

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 owner's 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 people with various types of disabilities. Participants will apply what they are learning through in class polls on common situations they encounter.

HOTMA an Overview - All Programs 90-minute webinar or conference session

Focus: HOTMA is shaking up compliance across the affordable housing world and the deadlines aren't the same across the board. This essential training breaks down the Housing Opportunity Through Modernization Act (HOTMA) and what it means for **HUD Multifamily, Public Housing and HCV (PIH), USDA RD, HOME, and LIHTC**. We'll cover the key changes to income, assets, and eligibility rules and tackle the differing, and ever-changing, implementation timelines.

Whether your organization is ready or just starting to plan, this course provides a clear, practical roadmap to prepare for HOTMA across all programs. It's perfect for compliance professionals, property managers, and administrators who need to stay ahead of the curve.

IV. Fair Housing

Fair Housing Fifteen: Facts, Fixes, and FAQs 90-minute webinar or conference session

Focus: What are the most common Fair Housing questions—and how do you answer them with confidence?
In this fast-paced, interactive session, we tackle the top 15 questions that matter most to your team. Before the session, the sponsor will receive a list of 40 frequently asked Fair Housing questions and select the 15 most relevant to your audience. Each question will be introduced with a participant poll, followed by a clear explanation, practical guidance, and real-world examples from the instructor. You bring the curiosity—we bring the clarity.

Fair Housing Timely Topics 90-minute webinar or conference session

Focus: Recent administrative changes have created significant uncertainty across the fair housing landscape, including staffing reductions at HUD's Office of Fair Housing and Equal Opportunity, shifts in enforcement responsibility, and the withdrawal or suspension of long-standing guidance. While policies and messaging may be changing, fair housing laws remain fully in effect.

This session focuses on timely issues affecting property owners and managers, including:

- Application taking and marketing practices
- Use of criminal records in screening
- Sexual orientation and gender identity protections
- Harassment (sexual, racial, religious, ethnic, and disability-related)
- Service animals and other assistance animals
- Limited English Proficiency (LEP) requirements
- Affirmative Fair Housing Marketing Plans (AFHMPs)
- The current status of VAWA regulations and forms

Learn what has changed, what has not, and how to continue operating in compliance amid uncertainty. Bring your toughest fair housing questions and leave with practical, defensible guidance you can rely on. *[Topics subject to change.]*

Fair Housing: The Letter and the Spirit *(An Inspirational General Session)* 90-minute webinar or conference session

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 <u>not</u> 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, with an inspirational Power Point with sound and music.

Fair Housing Compliance: We're All in This Together 3-hour webinar or half-day in person

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 be done differently to avoid fair housing exposure. The session will conclude with a set of best practices and a take-home self-assessment.

Criminal Activity and Housing: Federal, State and Local Rules 90-minute webinar or conference session

Focus: On 11/17/2025, HUD rescinded its 4/10/2024 Proposed Rule "Reducing Barriers to HUD-Assisted Housing" to change how criminal records may be considered in deciding to prohibit individuals from residing in HUD-assisted housing. Where does this leave housing providers? This course is applicable to all properties subject to the Fair Housing Act and includes information on how criminal screening can still violate the Fair Housing Act as well as updates on state and local "fair chance housing" ordinances that limit your ability to do criminal screening.

Reduce Your Risk of Fair Housing Violations in Screening Applicants 90-minute webinar or conference session

Focus: Even well-intentioned policies can violate fair housing laws if they result in discrimination against protected classes. This session explains how criminal background checks, nuisance ordinances, "crime-free" programs, domestic-violence policies, and income restrictions can create disparate impact risks—especially for Blacks, Hispanics, women, and persons with disabilities. Learn practical ways to revise your policies, strengthen consistency in screening, and protect your organization from costly fair housing violations.

Implementing VAWA On Site 3-hour webinar or half-day in person

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, 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]
- 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! 90-minute webinar or conference session

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 Manager Dos and Don'ts: You Decide 90-minute webinar or conference session

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 acceptable when advertising or speaking about your property.

Fair Housing for Maintenance: Do's and Don'ts 90-minute webinar or conference session

Focus: Maintenance personnel encounter residents more than anyone else on site. 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 90-minute webinar or conference session

Focus: AFHMPs submitted but not approved? MOR findings for not having an approved plan on file? Confusion about which race and ethnicity data to use. And now, with the Administration's **proposal to eliminate the AFHMP requirement**, owners and agents are asking: *Do we still need an AFHMP—and what does compliance look like right now?*

This session cuts through the noise.

Despite proposed changes, **many properties are still being cited for AFHMP deficiencies**, and the Fair Housing Act obligations underlying affirmative marketing remain in place. **In 2026 HUD has implemented an expedited method for getting plans reviewed and approved.** This practical, plain-English session focuses on what housing providers **must do today** to stay compliant and defensible during this period of uncertainty.

Drawing on experience preparing and reviewing **500+ AFHMPs nationwide** for HUD, RD, and state agencies, Gwen Volk walks participants through how to complete an **approvable AFHMP**. Attendees will learn how to use Census Bureau tools; select and interpret the correct demographic data; develop effective outreach strategies and community contacts; and work with HUD, RD, PBCAs, or state agencies.

The session also covers **5-year AFHMP reviews**, how to document compliance when agencies are not actively reviewing plans, and how to respond to AFHMP-related MOR findings.

Participants will leave with **clear, practical guidance** on separating proposed changes from enforceable requirements—and a roadmap for AFHMP compliance that works in the real world.

How to Implement an AFHMP and Affirmatively Market to the Least Likely to Apply 90-minute webinar or conference session

Focus: So, you've written your Affirmative Fair Housing Marketing Plan and HUD, RD or the State Agency have approved it. Now what? Bring the plan you are trying to implement, and we will dissect it together. 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 discuss FHEO's focus on what they call "segregated" properties and how to demonstrate 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.

504 Coordination (with or without a named "504 Coordinator") 90-minute webinar or conference session

Focus: Section 504 provides special protection to people 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 one person has been named as the "504 Coordinator" or not. 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.

Fair Housing 101 4 hours in 2 2-hour webinars or half-day in person

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 plus a review of enforcement, penalties, and how to protect your property and employees from discrimination findings.

SIGNATURE COURSE CATALOG

Reasonable Accommodation 90-minute webinar or conference session

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 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 90-minute webinar or conference session

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 90-minute webinar or conference session

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 90-minute webinar or conference session

Focus: Most 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 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.

V. Special Programs

Introduction to Affordable Housing 90-minute webinar or conference session

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) – LIHTC - Rural Development – HOME – CDBG – RAD - Public Housing – Bonds – etc.

Understanding HOME 4 hours in 2 2-hour webinars or half-day in person

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? 90-minute webinar or conference session

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 2025, RAD has preserved 253,127 public ,housing units and 14,390 units of Rent Supplement, 14,470 RAP 6,840 Mod Rehab and 4,844 Mod Rehab SRO by converting them to a Section 8 platform. RAP and Rent Supp units no longer exist. Since 2023, 121 projects and 7,573 units of 202 PRAC have converted to RAD. 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 the latest changes to RAD or refresh on what RAD is and how it changes the properties that convert.

VI. Affordable Housing Extra

COQ Made Easy [FREE] 90-minute webinar or conference session

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 90-minute webinar or conference session

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 come with a requirement for programs to enrich the quality of life of residents but 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.

Time Management and Accountability 90-minute webinar or conference session

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 90-minute webinar or conference session

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

Communications Workshop for the Property Management Team 6-hour workshop in person only

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 people with disabilities, and much more. *Contact us for more information on the abbreviated conference format.

Do the Right Thing - Property Management Ethics 90-minute webinar or conference session

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.

What Do You Say After "Hello?" Mastering the Art of Conversation and Networking 90-minute webinar or conference session

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.