



AFFORDABLE HOUSING  
MANAGEMENT ASSOCIATION

# CELEBRATING AFFORDABLE HOUSING



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23rd Annual AHMA Conference

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September 21 - 23, 2005

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Sheraton Gunter Hotel

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San Antonio, Texas

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# ABOUT THE PROGRAM

**M**ix 3 parts HUD with 2 parts developer and 1 part non-profit. Stir together rapidly in a circular motion. Add a liberal helping of Congress and stir back and forth, back and forth, back and forth.

Sprinkle in Rural Development; add a dash of tax credits, a twist of IRS, and a pinch of NAHMA. Stir together until it blends (this may take a long time).

## Affordable Housing Salsa

Season with regulations to suit taste (be careful, not too much, this is potent stuff), add a splash of contract administrator and garnish with Section 8.

Let it sit in the refrigerator for the life of the contract and then serve with multi-colored chips. This recipe makes about 11,000 servings but must be remixed annually. 🌮

### WHO SHOULD ATTEND THIS CONFERENCE?

Owners/Agents; Non Profit Administrators; Site Managers; Rural Development Site Staff; and Maintenance Staff for Privately Owned HUD Subsidized or Low Income Housing Tax Credit affordable multifamily housing.

### ABOUT AHMA

#### MOUNTAIN • PLAINS • DESERT

Our goal is to be an indispensable resource to managers of affordable housing in our region. AHMA was incorporated in 1982 as a non-profit organization of property managers and owners who manage and develop privately owned affordable and subsidized housing. AHMA is composed of over 700 members in Colorado, Utah, Wyoming, Montana, North Dakota, South Dakota and several adjacent states.

### ABOUT THE HCCP EXAM

The examination will be held on Friday, September 23rd at 9:00 am. The cost for the exam is \$175, in addition to the conference fee. It is a closed book exam containing 75 questions lasting approximately 2 hours. Requirements for certification include a passing score on the HCCP exam; submission of the Professional Profile/Application for Certification; minimum of two years experience working with the housing credit program (at least 50% of the time); 10 hours of Housing Credit training; commitment to professional ethics; and continuing education.

*\*TheoPRO will be teaching TheoPro 1, 2 & 11 for the Tax Credit track which is designed to prepare you for the HCCP exam. However, AHMA cannot guarantee a successful score on the exam, nor that all information listed on the exam will be covered in entirety.*

## SAN ANTONIO CITY TOUR SEPTEMBER 23, 2005 / NOON-4:00 PM

**F**or history buffs, San Antonio is a Mecca. Native Americans first lived along the San Antonio River, calling the area "Yanaguana," which means "refreshing waters," or "clear waters." A band of Spanish explorers and missionaries came upon the river in 1691, and because it was the feast day of St. Anthony, they named the river "San Antonio." The actual founding of the city came in 1718 by Father Antonio Olivares, when he established Mission San Antonio de Valero, which became permanently etched in the annals of history in 1836 as The Alamo where 189 defenders held the old mission against some 4,000 Mexican troops for 13 days. Located in the heart of downtown, today The Alamo is a shrine and museum. A tour of downtown San Antonio will uncover centuries of history, including:

- La Villita, one of the original settlements was

comprised of Spanish soldiers and their families.

- The Spanish Governor's Palace, which was the seat of government when San Antonio was the capital of the Spanish Province of Texas
- The San Fernando Cathedral, whose construction was started in 1731 by Canary Islanders
- Mission San Jose
- Market Square, the largest Mexican marketplace outside of Mexico
- And the Steves Homestead, which is a mansion open to the public in the King William Historic District.

Our guests meet in the lobby of the hotel prior to the noon departure. A professional tour guide complete with signage will escort the guests to the motorcoaches. Along the journey, the tour guide will give history of San Antonio and of the sites we are about to see.

# GENERAL AND BREAKOUT SESSIONS AT A GLANCE

Wednesday, September 21, 2005				
	General Topics Track	Onsite Mgmt. Track	Tax Credit Track	Maintenance Track
7:30 a.m. to 9:00 a.m.	Registration, Trade Show and Continental Breakfast			
9:00 a.m. to	Keynote Speaker: Jones Loflin - <i>"Juggling Elephants"</i>			
10:15 a.m. to	NAHMA Update	4350.3 Q&A Policy Update	Determining Eligibility in LIHTC Properties	Repair or Replace?
12:15 p.m. to 1:30 p.m.	Lunch on your own			
1:45 p.m. to	Dialogue with Your Contract Administrator	Preparing for a Management and Occupancy Review	Determining Eligibility in LIHTC Properties ( <i>continued</i> )	Property Environmental Issues
3:45 p.m. to	Managing a Tax Credit and Section 8 Property	Understanding Your Auditor		
5:15 p.m. to	Reception			
6:30 p.m. to	Fiesta Dinner at Aldaco's with Mariachi Band and Flamenco Dancers			
Thursday, September 22, 2005				
7:30 a.m. to 9:00 a.m.	Trade Show and Continental Breakfast			
9:00 a.m. to	Keynote Speaker: Harvey Alston - <i>"Be the Best"</i>			
10:15 a.m. to	Self Defense	Fair Housing/ AFHMP's	Understanding the LIHTC Program	Fair Housing for Maintenance
12:00 p.m. to	Awards Luncheon			
1:30 p.m. to	Rural Development Update	Late Breaking News	Understanding LIHTC ( <i>continued</i> )	Hands On Maintenance
3:45 p.m. to 5:00 p.m.		Marketing Roundtables	What's New in Section 42?	
Friday, September 23, 2005				
8:00 a.m. to	Trade Show and Breakfast			
9:00 a.m. to	HUD Update	Senior Issues and Solutions	HCCP Exam	The REAC of OSHA
11:00 a.m. to	Wrap Up Closing Session			

**9:00 am - 10:00 am**

**OPENING KEYNOTE: JUGGLING ELEPHANTS?**

Does your life feel like a three ring circus? *Juggling Elephants* is a witty and profound parable about one man's experience with the circus. Jones applies his insights to professional and personal "acts" in his life, and quickly finds that he is more productive, less stressed and better able to lead the individuals in his "lineup." This session is designed to radically alter the way you focus your two most critical resources of time and money.  
*Jones Loflin, Denton, NC*

**10:15 am - 12:30 pm**

**CONCURRENT BREAKOUT SESSIONS**

**NAHMA Update on National Issues**

NAHMA updates us on the key changes in regulations, legislation affecting affordable housing and any relevant late breaking news.

*Kris Cook, Executive Director, National Affordable Housing Management Association (NAHMA), Alexandria, VA*

**Q & A Policy Review to HUD 4350.3 REV-1**

This session will discuss the Q & A document that recently became policy for the HUD 4350.3 REV-1 handbook of occupancy requirements. At the time the revised Handbook 4350.3 Rev-1, Occupancy Requirements of Multifamily Housing Programs was issued in August 2003, a mailbox was established to respond to questions related to the new handbook. A summary of the questions and answers was compiled and put through Departmental clearance. The answers to the questions included in the summary are considered official policy. Anita will review the questions and provide explanations and discussion related to these points of clarification.

*Anita Moseman, Monfric Realty Inc., Clifton, CO*

**Determining Eligibility for your LIHTC property - Part 1**

Truly a course for those who handle household files, this one-day workshop covers the issues of qualifying households from basic rules to complex math. Participants are given fundamental background in the following areas: basic LIHTC program background; how to's of verifying, calculating, and certifying households using the HUD handbook; real-life workshops, complete with applications and third party verifications; learn to test files for completeness of information; and learn to perform calculations to determine eligibility.

*TheoPRO Compliance & Consulting, Inc.*

**Repair or Replace?**

Jeff will share his expertise on evaluation, repair and replacement of various appliances and other components on your property. He will also discuss locating parts, ordering and buying with emphasis on quality, dependability and long-term actual cost.

*Jeff Boyd, The Ross Management Group, Denver, CO*

**12:15 pm - 1:30 pm**

**LUNCH IS ON YOUR OWN TODAY**

**1:45 pm - 3:30 pm**

**CONCURRENT BREAKOUT SESSIONS**

**Dialogue With Your Contract Administrator**

HUD and Contract Administrators from the region (including Utah, South Dakota, Montana, Wyoming, and Colorado) have been invited to provide an update session and question and answer forum. We will discuss any process or compliance issues related to Performance Based Contract Administration. After the general presentation, groups will break-out by individual state for further discussion. Please bring your questions.

**Preparing for a Management & Occupancy Review (MOR)**

Are you ready for your upcoming MOR? Learn how to avoid and/or respond to possible findings for your file inspection. What will your CA be looking for? This session will provide you with tools to help you become prepared for your next management review.

*Karen Burkett, Real Estate Management Specialists, Kalispell, MT*

**Determining Eligibility - Part 2**

*(See part 1 description for details)*

**Property Environmental Issues**

This session will highlight three of the most common environmental issues on your property. Mold, Lead-based paint and asbestos. We will go through each topic and discuss detection, potential threats and hazards, and solutions to these common challenges.

*Jeff Boyd, The Ross Management Group, Denver, CO*

**3:45 pm - 5:00 pm**

**CONCURRENT BREAKOUT SESSIONS**

**Managing a Tax Credit and Section 8 Property**

Learn how the Section 8 and Section 42 programs differ and how to handle the differences you encounter such as managing your files and other common issues.

*Anita Moseman, Monfric Realty, Inc., Clifton, CO*

## WEDNESDAY, SEPTEMBER 21ST

### Understanding Your Auditor

CPAs and compliance auditors are reviewing your files and records. This session will provide specific details as to what your auditor is looking for and how he/she looks for it. Become better prepared and gain an understanding of the auditor mindset while they are on the job.

*Instructor TBD*

### Determining Eligibility - Part 3

*(See part 1 description for details)*

### Property Environmental Issues (Continued - Part 2)

*(See part 1 description for details)*

#### 5:15 pm - 6:15 pm RECEPTION

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Start the evening with a cool beverage and some light appetizers before we transport you to Aldaco's for dinner. Guided groups to the restaurant will leave the hotel starting at 5:30 pm.

#### 6:30 pm - 9:30 pm FIESTA AT ALDACO'S

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Its fiesta time! This year we are transporting you off-site to Aldaco's Mexican Restaurant in historic Sunset Station where you will enjoy an authentic Mexican dinner that will tantalize your taste buds and provide a true taste of San Antonio. You won't want to miss the strolling mariachis and flamenco dancers! This cost is included in your conference registration fee.

## THURSDAY, SEPTEMBER 22ND

#### 9:00 am - 10:00 am KEYNOTE: *BE THE BEST!*

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Believe in yourself and don't hesitate to let others know that you are great! Expand your mind and continue to grow for you will always be the star of the show. Strive to achieve excellence in all that you do for God knew what he was doing when he created you. Think before you act, work before you rest, and let the world know that you are the "BEST".

*Harvey Alston, Columbus, OH*

#### 10:15 am - 12:00 pm CONCURRENT BREAKOUT SESSIONS

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##### Self Defense - Have More Confidence

Back by popular demand, Pam will once again instruct a hands-on self defense class that focuses on awareness, prevention, and reducing risk.

*Pam Dechow, The Ross Management Group, Denver, CO*

##### Fair Housing/AFHMP's

Fair Housing compliance is a priority. This session will provide a general overview of fair housing law and provide insight on how to avoid fair housing complaints. Every staff member should know that they can be held personally liable! We will further discuss the Affirmative Fair Housing Marketing Plan and what it needs to contain.

*Karen Burkett, Real Estate Management Specialists, Kalispell, MT*

##### Understanding the LIHTC Program

Topics covered in this two-part course are: Determining the value of a tax credit project; Understanding the developer/investor/manager roles; How income/utility allowances/rents are calculated; Students and lease terms; Qualifying applicants including calculating troublesome assets such as Stocks, Bonds, Mutual Funds, IRAs, Pensions, Annuities, etc.; The challenging first year of the credit period; Recertification issues; Unit transfers and adding household members; Working with mixed-income properties; Tracking Applicable Fractions and Minimum Set-asides; Introduction to working with RHS, Home Funds and Bonds; and Compliance: the State Agency's role, corrections and cures.

*TheoPRO Compliance & Consulting, Inc.*

##### Fair Housing for Maintenance

The treatment of all must be fair, equitable and consistent. Maintenance staff usually has the majority of the contact with the residents, therefore subjecting them to fair housing complaints. Every staff member should know that they can be held personally liable! Learn how to keep you, the property, and the company out of hot water by examining current policies, procedures and attitudes.

*Karen Crosta, KDC Solutions, Inc., Seattle, WA*

#### 12:00 pm - 1:30 pm AWARDS LUNCHEON

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#### 1:30 pm - 3:30 pm CONCURRENT BREAKOUT SESSIONS

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##### Rural Development Update - Part 1

This two-part session will provide an update on the new 3560 Regulations applicable to the Section 515 program. We will review some of the major changes in detail. We will also discuss some of the additional changes to the handbook that are pending and anticipated.

*Karen Crosta, KDC Solutions, Inc., Seattle, WA*

## THURSDAY, SEPTEMBER 22<sup>ST</sup>

### Late Breaking News

This session is reserved for any late breaking news or regulation changes released from July through September. We strongly anticipate that Change 2 to the HUD 4350.3 - REV 1 will be released soon.

### Understanding the LIHTC Program - Part 2

*(See part 1 description for details)*

### Hands On Maintenance - Part 1

This two-part maintenance segment will take maintenance personnel off-site to a property in San Antonio where we will walk through the property and discuss various aspects of property maintenance from a visual and logical perspective. We will look at boilers, environmental controls, common areas and address unit specific questions. Bus will leave the hotel at 1:30 pm. Meet in the hotel lobby.

*Jeff Boyd, The Ross Management Group, Denver, CO*

### 3:45 pm - 5:00 pm CONCURRENT BREAKOUT SESSIONS

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### Rural Development Update - Part 2

*(See part 1 description for details)*

### Marketing Roundtables

This roundtable discussion is intended to outline some of the tactical approaches we can utilize to fill vacant units. This interactive session is intended to provide a forum for open discussion and sharing of ideas. We realize that not every approach is suitable for every property, but we will discuss a wide variety of methods and approaches. Ideas will be compiled and distributed to attendees after the conference.

*Karen Burkett, Real Estate Management Specialists, Kalispell, MT*

### What's New in Section "42"

Are you up to date on current LIHTC issues? This course will cover the Impact of Revenue Procedure 2004-82; The 8823 Guide and what it means to the industry; and what to expect in years 16-forever.

*TheoPRO Compliance & Consulting, Inc.*

### Hands On Maintenance - Part 2

*(See part 1 description for details)*

## FRIDAY, SEPTEMBER 23<sup>RD</sup>

### 9:00 am - 10:45 am CONCURRENT BREAKOUT SESSIONS

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### HUD Update

This session will be composed of regional HUD representatives who will provide information on what is happening at HUD and what to expect in the future. This interactive session will also allow for questions and cover any additional timely topics at hand.

*Marcie LaPorte, Denver Multifamily HUD Office, Denver, CO*

### Senior Issues and Solutions

Elderly tenants are often frail or in poor health and sometimes dependant on family members. What do you do when you have a deteriorating resident that needs professional care with no family around? What should you do when a resident passes away with no family? How would you handle a resident who is a victim of theft, elder abuse or other crimes? Many times they are victims of their own family. This interactive roundtable session will discuss challenging issues specific to Seniors and share ways to prevent and handle these delicate situations. If you have a challenge you would like specifically addressed, please email Courtney@rockyahma.org with suggestions by September 1, 2005.

*Moderator - Sandy Aldrich, Danville Development, Salt Lake City, UT*

### HCCP Exam

The exam is a closed book exam containing of 75 questions lasting approximately 2 hours. The testable subject areas are: Tenant Qualification and Leasing; Housing Credit Accounting and Compliance; and Federal and State Laws, Regulations and Programs. (Additional cost of \$175 for this exam - you MUST pre-register to take the exam. See About the HCCP Exam elsewhere in this brochure for more information.)

### The REAC of OSHA

This course will review and discuss the correlation amongst REAC and OSHA requirements. This interesting session will help you to understand the similarities, differences and purpose behind these two important areas of compliance. You will learn what REAC and OSHA inspectors are looking for and how you can address both components in your maintenance plan.

*Jeff Boyd, The Ross Management Group, Denver, CO*

### 11:00 am - 11:30 am WRAP UP CLOSING SESSION

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*Be present for a chance to win prizes.*

Take the opportunity to gather conference certificates, provide ideas for next year's conference and say goodbye until 2006 to the great group of people who make up AHMA.

## GENERAL INFORMATION

### CANCELLATION POLICY

Full refunds less a \$50 processing fee will be made for cancellations **received before September 1st**. After this date, refunds less \$150 will be given. **NO SHOWS WILL BE BILLED THE ENTIRE AMOUNT.** You may substitute a new person in place of canceling a registration.

### SPECIAL NEEDS

If you have special physical, dietary, or other needs, please let us know with your registration or at least 30 days in advance so we can provide appropriate accommodations.

### DRESS

Dress for the conference is business casual. For the Fiesta Reception and Dinner, Traditional Spanish/Mexican Costume is welcome (see banquet description for more detail).

**Special Note:** Please dress in layers as room temperatures can be very unpredictable.

### CONTINUING EDUCATION CREDITS

This conference qualifies for credit towards the designation of National Affordable Housing Professional (NAHP) and selected credits toward the Housing Credit Certified Professionals (HCCP) by NAHMA. Continuing Education Credits are also approved by the Colorado Real Estate Commission and have been applied for in the States of South Dakota and Montana. Call AHMA for more information at 303-840-9803.

### HOTEL INFORMATION AND ACCOMMODATIONS (Reservation Deadline is August 22nd)

The Sheraton Gunter Hotel is an elegant, historic property located in the heart of Downtown San Antonio just a block and a half from the world famous Riverwalk. Built in 1909, the Gunter Hotel has the timeless elegance of the 1900's and up-to-date amenities to soothe any weary traveler. **To make your reservations, call 888-999-2089 and identify yourself with the AHMA 2005 group to get the contracted rate.** Be sure you ask for and save your confirmation number and fully understand the reservation cancellation policy.

### ROOM RATES ARE \$119 FOR SINGLE/DOUBLE

All rates are subject to applicable local occupancy taxes of 10.75% for the city and 6% for the state.

**You must make your reservations by August 22nd to qualify for conference rates.** PLEASE make your reservation early, room availability is still limited and is on a first-come, first-served basis. If you cannot get a room, call AHMA IMMEDIATELY for alternative lodging possibilities.

### GROUND TRANSPORTATION

SA Trans is the official airport shuttle provider in San Antonio. Their ticket booth is located outside of baggage claim. No advanced reservations are necessary as the shuttles leaves every 20 minutes for all downtown hotels. Shuttles may make various stops. Please visit their website for more information and coupons. [www.saairportshuttle.com](http://www.saairportshuttle.com)

**CABS ARE ALSO AVAILABLE** at the airport for approximately \$35.00 each way. If you have a party of 3 or more, it is more cost and time effective to share a cab rather than take the shuttle.

## REGISTRATION FORM

### AHMA 2005 Annual Conference

Complete registration below or register online at [www.rockyahma.org](http://www.rockyahma.org)

Front Line Staff participation in this conference is considered a HUD allowable expense.

<b>AWARDS LUNCHEON</b> (please choose one) <input type="checkbox"/> Grilled Snapper <input type="checkbox"/> London Broil <input type="checkbox"/> I would like all vegetarian meals	<b>Room Reservation cutoff is August 22, 2005 - Don't forget to make your reservation! Payment is Due Prior to Conference Admittance</b> <b>Check enclosed:</b> Check Number _____ Total \$ _____ <b>Payment is made by credit card:</b> <input type="checkbox"/> MasterCard <input type="checkbox"/> Visa <input type="checkbox"/> AMEX Card Number _____ Expiration Date _____ Name on Card _____ <b>Mail Check to: AHMA, P. O. Box 21182 Denver, CO 80221</b>
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PROGRAM REGISTRATION		MEMBER FEE	NON-MEMBER FEE	TOTAL FEE
Early Bird Full Registration Fee (postmarked by 8/22/05)		\$395	\$460	
Full Conference Registration Fee (postmarked after 8/22/05 but before 9/10/05)		\$425	\$490	
Late Registration Fee (postmarked after 9/10/05)		\$455	\$505	
# <b>OPTIONAL EXTRAS</b>				
Guest Ticket for Fiesta Dinner only		\$ 50	\$ 50	
Guest Package		\$135	\$135	
San Antonio City Tour (includes box lunch)		\$ 55	\$ 55	
HCCP Examination		\$175	\$175	
<b>Total Amount Due:</b>				\$ _____

NAME (as it will appear on name tag)	
COMPANY OR PROPERTY	
ADDRESS	
CITY/STATE	ZIP
PHONE	
FAX	EMAIL
<b>GUEST INFORMATION</b> (guest package fee includes admittance to Keynote sessions and all meals)	
NAME	