

# Big Ideas in the Big Easy



2018 SERC-NAHRO  
Fall Workshop

November 10-12, 2018  
Hilton New Orleans, Riverside  
New Orleans, Louisiana





## President's Message

It is my wonderful duty to welcome you to the 2018 Fall Workshop located at the Hilton Riverside in New Orleans, Louisiana. Situated within walking distance of

Bourbon Street, the French Quarter, Harrah's Casino, and a variety of cultural, culinary and shopping adventures, the hotel is in the perfect location. The panoramic vistas available from the resort when teamed with the cultural and culinary experiences available surely provide a fantastic venue for our enjoyment.

The theme for this conference is "Big Ideas in the Big Easy." This theme pairs perfectly with our ever-changing industry and the need to be innovative and think big. We hope you will enjoy the sessions and embrace the changes and allow us to help you on your path to success. The conference will offer a wide array of sessions that will expand your knowledge of the new programs and fortify your understanding of the traditional. Whether you come from a small agency or a large agency, we aim to provide diverse training tracks that will help everyone.

Our desire at SERC is to provide the highest quality training, the best net-working opportunities and of course we always excel at providing that wonderful SERC hospitality! We appreciate you coming to this beautiful city and look forward to a fantastic conference. Please, let us know how we can meet your needs and I look forward to interacting with each of you personally.

Buddy Oldfield and the Professional Development committee always do a wonderful job at putting together this fantastic event, but I think they have outdone themselves this year! Without their hard work, none of this would be possible.

Thank you for choosing SERC for your educational and networking needs! We will do our best to meet, and hopefully exceed, all your expectations.

A handwritten signature in blue ink, appearing to read "Sean Gilbert". The signature is stylized with a large "S" and "G".

Sean Gilbert, SERC-NAHRO President

## The 2018 Fall Workshop Conference app is available for download.

Put the details of the Fall Workshop in the palm of your hand with the Fall Workshop mobile app. Take advantage of this app to plan, view the schedule, and mark agenda items that you don't want to miss. In addition, the app will also allow us to send announcements in real time to attendees.

The app provides the following information:

- 2018 Fall Workshop agenda by track or by date/time
- Session presenter info and documents
- SERC-NAHRO Officers information
- News and Announcements
- Twitter feed from the SERC-NAHRO President

Access is very easy! From your mobile device:

- Visit <http://my.yapp.us/SERCFALL> on your device and follow the instructions on the page or scan the QR Code below
- You'll be asked to install Yapp from the app store (if you don't already have it)
- Open Yapp and tap "Download an Existing Yapp" and your app will appear



We hope you find the app informative and useful!

**Program Information**  
**SERC-NAHRO**  
**2018 FALL WORKSHOP**



**Registration**

The Registration Desk is located in The District on the Third Floor adjacent to the training rooms:

**Saturday, November 10**  
1:00 p.m. until 6:30 p.m.

**Sunday, November 11**  
8:30 a.m. until 12:00 p.m.

**Badges**

All individuals attending the workshop sessions and other scheduled events must wear the identification badge provided at registration. Your cooperation will be appreciated.

**Tickets**

Tickets for special events are included in your registration packet. Tickets must be presented for the Reception on Sunday evening, the Banquet on Monday evening and the Breakfast on Tuesday morning. Extra tickets may be purchased at the Registration Desk. Ticket prices are:

<b>Saturday Reception</b>	<b>\$100.00</b>
<b>Sunday Reception</b>	<b>\$100.00</b>
<b>Breakfast</b>	<b>\$60.00</b>

# **Program Information**

## **Professional Development Committee**

The Professional Development Committee is responsible for the development of the Fall Workshop. The committee is under the portfolio of the Vice President for Professional Development.

Your comments and suggestions concerning this workshop or future workshops would be appreciated. Please send your comments to the Vice President for Professional Development at the address listed below or you can comment or e-mail from the [serc-nahro.org](http://serc-nahro.org) web site. The Professional Development Committee members responsible for this workshop are:

### **Cindy Harrington**

Vice President for Professional Development  
Bluefield Housing Authority  
P. O. Box 1425 ♦ Bluefield, WV 24701  
[cindybha@comcast.net](mailto:cindybha@comcast.net)

### **Harden A. Oldfield, III**

Chairperson  
Professional Development Committee  
Augusta Housing Authority  
1435 Walton Way ♦ Augusta, GA 30901  
[boldfield@augustapha.org](mailto:boldfield@augustapha.org)

### **Committee Members:**

Patricia Allen	Georgia
Paula Dempsey	Mississippi
Clementine Elmore	South Carolina
Joyce Floyd	Tennessee
Charles Harrington	Virginia
Cindy Harrington	West Virginia
Marie Harris	Georgia
Felicia Jackson	Mississippi
Donna Lamer	South Carolina
Marilyn Medley	Tennessee
Faith Thompson	North Carolina
Brian Williams	Alabama

### **Registration:**

Angela Strickland	Georgia
Jacob L. Oglesby	Georgia

### **Program:**

Amy Bazemore	Georgia
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# Saturday, November 10

## Program Information

### Registration

Registration Desk  
The District, Third Floor  
adjacent to the training rooms  
1:00 p.m. – 6:30 p.m.

### Opening General Session

Jefferson Ballroom, Third Floor  
3:00 p.m. – 4:30 p.m.

### Reception

Mark Twain Courtyard Riverside Building  
(in case of inclement weather:  
St. Charles Ballroom, Third Floor)  
6:00 p.m. – 7:00 p.m.

## Opening General Sessions

### Jefferson Ballroom, Third Floor

#### **Presiding**

Cindy Harrington  
Vice President for Professional Development  
SERC

#### **Invocation**

Johnny Johnson  
Commissioner  
Mississippi Regional Housing Authority IV  
Columbus, Mississippi

#### **Presentation of Colors**

New Orleans Police Department Honor Guard  
New Orleans Police Department  
Special Operations Division

#### **Pledge of Allegiance**

Ailrick Young  
Past President  
SERC

#### **Welcome**

Cindy Harrington  
Vice President for Professional Development  
SERC

#### **Greetings from NAHRO**

Tess Hembree  
Director Congressional Relations  
NAHRO

**SERC-Cares**

Keith Liederman, Ph.D  
Chief Executive Officer  
Kingsley House

**Remarks**

Sean Gilbert  
President  
SERC

**Keynote Speaker**

Ellen Hester  
Go With The Flo

**Conference Information**

Harden A. Oldfield, III  
Chairperson  
Professional Development Committee  
SERC



# SERC Cares



Kingsley House, founded in 1896 by the Reverend Beverley Warner of Trinity Episcopal Church, is proud of their rich history in helping to improve the lives of families in the community. During their many years of service, they have served a vast array of people; they helped Irish and German immigrants settle in New Orleans during the end of the 19th century, provided children and families with educational and recreational opportunities throughout the 20th century, and continue to help residents resettle after Hurricane Katrina in the new millennium.

While the needs of the community have changed over the years, Kingsley House has retained its fundamental mission. Their programs serve individuals of all ages, ranging from six-week-old infants to senior citizens who are over one hundred years of age. Their programs range from social services and family counseling to adult day care and senior services in New Orleans.

Visit their website at [www.kingsleyhouse.org](http://www.kingsleyhouse.org) to learn more about their mission, their values-based approach and the programs they operate.

Boxes are available for cash and check donations.  
Computer is available for credit card donations.

# Sunday, November 11

## Program Information

### Registration

Registration Desk  
The District, Third Floor  
adjacent to the training rooms  
8:30 a.m. - 12:00 p.m.

### Continental Breakfast

St. James Ballroom  
7:45 a.m. – 8:45 a.m.

### Sessions

9:00 a.m. – 12:00 p.m.  
1:30 p.m. – 5:00 p.m.

### Morning Break

St. James Ballroom  
10:30 a.m. – 10:45 a.m.

### Lunch On Your Own

12:00 p.m. – 1:30 p.m.

### Afternoon Break

St. James Ballroom  
3:00 p.m. – 3:15 p.m.

### Reception

St. Charles Ballroom  
6:30 p.m. – 7:30 p.m.  
Cash Bar Opens at 6:00 p.m.



## Sunday Sessions

### **ASSISTED HOUSING**

#### **Informal Hearings**

Royal

9:00 a.m. – 4:30 p.m., including breaks

What information should be presented at an Informal Hearing? Are you and your staff prepared to present the right kind of information? How can you deal with any liabilities and responsibilities that result from adherence to your policies? This session is geared towards Hearing and Review Officers, but all Assisted Housing Personnel will benefit from the information presented.

Presenter:

**Dennis Morgan**, Senior Associate

D.L. Morgan and Associates

Sarasota, Florida

*Moderator: Charles Harrington*

*Marion Housing Authority, VA*

### **COMMISSIONERS**

#### **PHA 101 – The Development Toolbox**

Jackson

9:00 a.m. – 4:30 p.m., including breaks

This day and a half session will incorporate a broad survey of the laws governing Housing Authorities, the roles and responsibilities of the members of the Board of Commissioners, the Executive Director and the Staff. The tools that Housing Authorities can use to develop and/or rehabilitate affordable housing, including mixed finance models, RAD and Low Income Tax Credits will also be discussed.

Presenter:

**H. Lee Hill II**, Attorney

**Torri T. Armstrong**, Attorney

Baker Donelson

Jackson, Mississippi

*Moderator: Felicia Jackson*

*Laurel Housing Authority, MS*

## Sunday Sessions

### **CR AND D**

#### **Leveraging 4% LIHTC and Bonds to Create New Affordable Housing Opportunities**

Commerce

9:00 a.m. –12:00 p.m., including break

This session will focus on how the non-competitive nature and year-round availability of the 4% LIHTC and multifamily tax-exempt bond program can be a strategic financing option for public housing authorities when addressing both public housing and non-public housing units. Examples of this strategy being implemented in the marketplace will be presented.

Presenters:

**Alvin Nance**, Chief Executive Officer

**David Arning**, Senior Vice President

LHP Development

Knoxville, Tennessee

*Moderator: Alanda Jackson*

*Chesapeake Hickory Housing Authority, NC*

### **CR AND D**

#### **Gulf Coast Housing Project Redevelopment and Housing Tour**

Commerce

1:30 p.m. – 5:00 p.m.

Join Kathy Laborde, President and CEO of the Gulf Coast Housing Project, a nationally award-winning redevelopment organization, as she outlines the work that her organization continues in developing affordable housing in the Post-Katrina era. Immediately after her presentation, join your colleagues for a tour of GCHP properties.

Presenters:

**Kathy Laborde**, President and CEO

Gulf Coast Housing Partnership

New Orleans, Louisiana

*Moderator: Jesse Norwood*

*Prichard Housing Authority, AL*

# Sunday Sessions

## **FINANCE**

### Nonprofit 101

Camp

9:00 a.m. – 12:00 p.m., including break

Do you have a Nonprofit? Do you need one? This session will cover the ins and outs of creating a nonprofit from the start to the finish. Items to be covered will include the major differences between a Housing Authority and a Nonprofit Corporation, applying for tax exempt status, the tax returns required for a Nonprofit, and other related subjects.

Presenter:

**Chad Porter**, CPA, CFE

Managing Partner

Smith Marion and Company, LLP

Brentwood, Tennessee

*Moderator: Stephen Burchett*

*Morristown Housing Authority, TN*

## **FINANCE**

### Coffee Shop Audit

Camp

1:30 p.m. – 5:00 p.m., including break

This session will cover the “Down and Dirty” of HUD changes relating to finance and how to prepare for an audit with them in mind. What you or your Fee Accountant should be doing to get ready and what an auditor will be looking for. The session will include an in-depth look at the FDS reporting common errors noted by HUD REAC.

Presenter:

**Chad Porter**, CPA, CFE

Managing Partner

Smith Marion and Company, LLP

Brentwood, Tennessee

*Moderator: Stephen Burchett*

*Morristown Housing Authority, TN*



## Sunday Sessions

### **MAINTENANCE**

#### **Dealing with Bedbugs**

Ascot/Newberry

9:00 a.m. – 12:00 p.m., including break

Most Housing Authorities deal with Bedbugs on a regular basis. How do you detect and treat for bedbugs? How can you eliminate them? This session will deal with the detection and elimination of bedbugs before they become a major problem and expense.

Presenter:

**Ernest Owens**, Commercial Accounts Executive

Gregory Pest Solutions

Greenville, South Carolina

*Moderator: Joe Wisniewski*

*Augusta Housing Authority, GA*

### **MAINTENANCE**

#### **Maintenance Roundtable Discussion**

Ascot/Newberry

1:30 p.m. – 5:00 p.m., including break

This session, designed for maintenance personnel at all levels, will offer them the opportunity to share information in a non-formal setting. A number of topics will be discussed including REAC Inspections, Unit Turnaround, Bedbugs and Dealing with Contractors. Come and ask your questions and share your insight with you peers.

Presenter:

**GAHRA Maintenance Committee Members**

Georgia

*Moderator: Joe Wisniewski*

*Augusta Housing Authority, GA*

## Sunday Sessions

### **PUBLIC HOUSING**

#### **Fair Housing**

#### **and Reasonable Accommodation**

Canal

9:00 a.m. – 12:00 p.m., including break

Fair Housing is still a Hot Issue! What is the latest? Find out in this session which will also cover Reasonable Accommodation and the information needed when approving or denying a request for a reasonable accommodation. The session will also cover the expectations that are placed on the agency staff in relation to these issues.

Presenter:

**Lisa Walker**, Chief Council

Housing Development Law Institute

Washington, DC

*Moderator: Angela Childers*

*Beaufort Housing Authority, SC*



### **PUBLIC HOUSING**

#### **VAWA and Emergency Transfers**

Canal

1:00 p.m. – 5:00 p.m., including break

Are you making the right decisions when it comes to VAWA and Emergency Transfers? Are you and your staff prepared to make those decisions and do you have sufficient information to make the appropriate decisions? What must you provide? What will be necessary to ensure the safety of your resident? Who is covered under VAWA? Come to this session and get the answer to these questions and many more.

Presenter:

**Lisa Walker**, Chief Council

Housing Development Law Institute

Washington, DC

*Moderator: Angela Childers*

*Beaufort Housing Authority, SC*

## Sunday Sessions

**RAD**

### Management and Occupancy Review Preparation

Magazine

9:00 a.m. – 12:00 p.m., including break

Are you prepared for your Management and Occupancy Review (MOR)? This session will provide you with the tools to achieve a Superior MOR performance rating.

Presenter:

**Vicki Bell**, Corporate Trainer

Navigate Affordable Housing Partners

Birmingham, Alabama

*Moderator: Jason Spencer*

*Tennessee Valley Regional Housing Authority, MS*

**RAD**

### Tenant Rental Assistance Certification System (TRACS) – Do You Need an Explanation?

Magazine

1:30 p.m. – 5:00 p.m., including break

According to HUD, TRACS is a HUD computer system developed to help improve financial controls over assisted housing programs by automating manual procedures and incorporating automated controls. But it's not that easy. This session will provide an explanation of the Project Based Section 8 TRACS database system and how certifications and vouchers are processed. Several topics will be explored including how TRACS impacts certain reports, how to properly reconcile certifications, the MAT Guide, the 50059 Instruction Guide and the TRACS User Guide. Additionally, the first-year conversion process to PBRA under RAD will be covered.

Presenter:

**Lisa M. Furbush**

Voucher Financial Manager

National Housing Compliance

Tucker, Georgia

*Moderator: Russell Nast*

*Tallapoosa Housing Authority, GA*



## Sunday Sessions

### **Small Agency Forum** **Implications of S.2155 for Small** **Public Housing Agencies**

Fulton

9:00 a.m. – 12:00 p.m., including break

What are the implications of S.2155, the Economic Growth, Regulatory Relief and Consumer Protection Act for Small Housing Authorities? While the act contains several common sense fixes to improve consumer access to mortgage credit and promotes capital formation, there are provisions that could seriously affect Small Public Housing agencies. This session will explore those provisions.

Presenter:

**Arthur Fleming**

Senior Vice President

Director of Community Investment Services

Federal Home Loan Bank of Atlanta

Atlanta, Georgia

*Moderator: Lisa Porter*

*Bristol Housing Authority, VA*

### **Small Agency Forum** **RAD for Small Agencies**

Fulton

1:30 p.m. – 5:00 p.m., including break

Learn the step by step instructions to determine if RAD would be effective for your agency. This will include a demonstration of the HUD self-analysis tool that pre-populates data. Learn the questions that you must answer before this decision can be made. Learn what would work better for you, PBV or PBRA and why? What work is required to be performed prior to closing? These and other issues will be discussed.

Presenter:

**Joyce Floyd**, Vice President of Strategic Planning and Development

Knoxville Community Development Corporation

Knoxville, Tennessee

*Moderator: Lisa Porter*

*Bristol Housing Authority, VA*

# Monday, November 12

## Program Information

### Breakfast and Program Legislative Update

St. Charles Ballroom

7:30 a.m. – 8:45 a.m.

*No Food Service after 8:15 a.m.*

### Sessions

9:00 a.m. – 12:00 p.m.

## Legislative Update



**Tess Hembree**  
Director of Congressional Relations  
NAHRO

Tess Hembree joined NAHRO in the spring of 2013, working with the Congressional Relations team to strengthen NAHRO's Congressional outreach, field operations, and advocacy efforts. Tess has worked in Washington, DC for nearly a decade in the housing and community development field, providing policy expertise and advocacy support to organizations such as the American Planning Association, Smart Growth America, the National Stroke Association, and others. Tess grew up in the Pacific Northwest and attended Western Washington University.

## Monday Sessions

### **ASSISTED HOUSING**

#### **Section Eight Updates**

Royal

9:00 a.m. – 12:00 p.m.

What's the latest on Section 8? Join Dennis Morgan as he provides an insight into the most current information for the Assisted Housing Program. Topics to be covered will be UPCS, FAST Updates, Streamlining, Administrative Plan Revisions, Verification Streamlining and other areas presenting challenges to the program.

Presenter:

**Dennis Morgan**, Senior Associate

D.L. Morgan and Associates

Sarasota, Florida

*Moderator: Charles Harrington*

*Marion Housing Authority, VA*

### **COMMISSIONERS**

#### **PHA 101 – The Development Toolbox**

Jackson

9:00 a.m. – 12:00 p.m.

*...continuation from Sunday...*

Presenters:

**H. Lee Hill II**, Attorney

**Torri T. Armstrong**, Attorney

Baker Donelson

Jackson, Mississippi

*Moderator: Felicia Jackson*

*Laurel Housing Authority, MS*

### **FINANCE**

#### **Is RAD Right For You From An Accounting Aspect?**

Camp

9:00 a.m. – 12:00 p.m.

Is RAD right for your agency? What are the plusses and minuses of RAD and how do they add up for you? What are the pros and cons of PBRA and PBV? How does it all look from an Independent CPAs point of view.

Presenter:

**Chad Porter**, CPA, CFE

Managing Partner

Smith Marion and Company, LLP

Brentwood, Tennessee

*Moderator: Stephen Burchett*

*Morristown Housing Authority, TN*

# Monday Sessions

## **MAINTENANCE**

### **Drug Awareness**

Ascot/Newberry

9:00 a.m. – 12:00 p.m.

Have you seen illegal drug activity at your Housing Authority or at least think there is illegal drug activity? What action should you take? How do you report it? How can you protect yourself and your residents? Come to this session and get the answers to these questions and many others concerning illegal drug activity.

Presenters:

**Officer Lee Smith**

I.C.E. Division

City of Byron Police Department

Byron, Georgia

*Moderator: Joe Wisniewski*

*Augusta Housing Authority, GA*



## **PUBLIC HOUSING**

### **The New Annual Contributions**

### **Contract**

Canal

9:00 a.m. – 12:00 p.m.

Have you read the new Annual Contributions Contract? Do you know about the changes that it contains? This session will explore the possible impact of changes in the Annual Contributions Contract and how they may affect you and your agency.

Presenter:

**Lisa Walker**, Chief Council

Housing Development Law Institute

Washington, DC

*Moderator: Angela Childers*

*Beaufort Housing Authority, SC*

## Monday Sessions

### **RAD**

#### **RAD – Consideration Factors**

Magazine

9:00 a.m. – 12:00 p.m.

Many Housing Agencies are still evaluating Rental Assistance Demonstration to determine if it is right for them. This session will provide the first-hand experiences from several agencies concerning how it has changed their operations. Come hear about the various issues faced by these agencies and get their perspective on converting to RAD via PBRA or PBV.

Presenters:

**James Cox**, Chief Operating Officer  
Greensboro Housing Authority, North Carolina

**Russell Nast**, Executive Director  
Tallapoosa Housing Authority, Georgia

**Jason Spencer**, Executive Director  
Tennessee Valley Regional Housing Authority,  
Mississippi

*Moderator: Joyce Floyd*

*Knoxville Community Development Corporation, TN*

### **Small Agency Forum**

#### **Legislation Affecting Small Agencies and Advocacy for Small Agencies**

Fulton

9:00 a.m. – 12:00 p.m.

Legislative Wise, what's on the horizon that will affect small agencies? What can you do to stay on top of any pending and new regulations? What can you do to have your voice heard? This session will explore the possible legislation that will affect Small Public Housing agencies as well as provide a number of ways that you, as a small agency can advocate for yourself and other small agencies.

Presenter:

**Tess Hembree**, Director of Congressional Relations  
NAHRO

Washington, DC

*Moderator: Lisa Porter*

*Bristol Housing Authority, VA*

# Prize Drawing

## Prize Drawing Information

The District/Conference Registration Area  
12:00 p.m.

A Prize Drawing Ticket was included in your Registration Packet. A drawing will be held at the end of each session on Monday for a cash door prize. One Grand Prize will be awarded immediately following the conclusion of the workshop in the District adjacent to the training rooms.

To enter, place the Prize Drawing Ticket in the box located in the last session you are attending. All tickets (including track winners) will be combined for the GRAND PRIZE DRAWING.



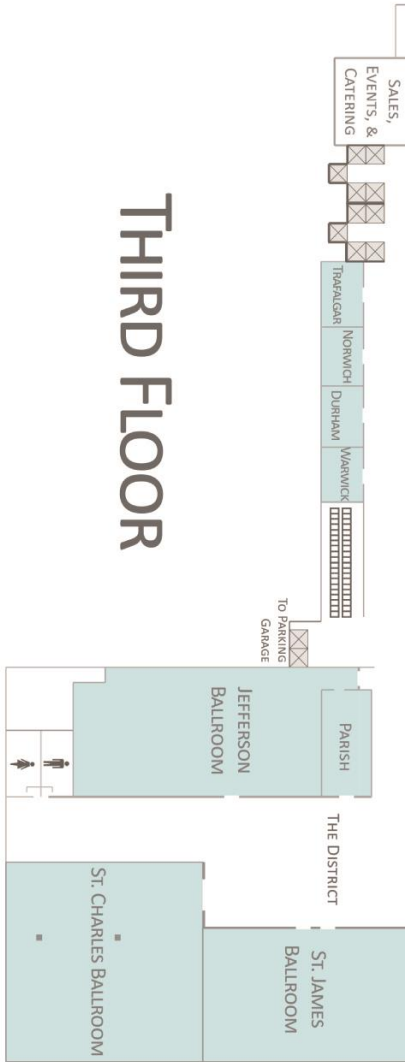
**YOU MUST BE PRESENT AT  
DRAWINGS TO BE ELIGIBLE FOR  
PRIZE AWARDS**

## Notes

## Notes



Map



# Map



# **SERC/NAHRO CONFERENCES**

## **NAHRO Legislative Conference**

Arlington, Virginia

April 7-9, 2019

## **SERC-NAHRO Annual Conference**

Orlando, Florida

June 23-26, 2019

## **NAHRO Summer Conference**

Boston, Massachusetts

July 11-13, 2019

## **NAHRO National Conference**

San Antonio, Texas

October 10-12, 2019

## **SERC-NAHRO Fall Workshop**

Hilton Head Island, South Carolina

November 3-5, 2019

