

# POWER OF THE PAST

## FORCE OF THE FUTURE



2019 SERC-NAHRO FALL WORKSHOP  
 NOVEMBER 3-5, 2019  
 HILTON HEAD MARRIOTT RESORT & SPA  
 HILTON HEAD ISLAND, SC



# President's Message



On behalf of the SERC Executive Committee, I'd like to personally welcome each of you to the 2019 Fall Workshop here in Hilton Head, South Carolina.

This year, the Professional Development committee has planned sessions to assist us in evaluating

and potentially transforming our agencies by providing information on various redevelopment tools. While the program may seem heavily focused on RAD, please, review other sessions for: Legislative Updates, Financial Management, Maintenance, and ROSS Programs. Please, send us your feedback from these sessions. The committee wants to hear back from you on this workshop as well as ideas of future topics to meet your agencies training needs.

The SERC Executive Committee appreciates you for attending this Workshop and reinvesting your most valuable resources to be with us. I hope you enjoy the sessions and take full advantage of the networking opportunities. I often find that during networking - whether on a break, in a reception, or on a walk to a class, I receive additional education, ideas, and guidance from our SERC colleagues.

While you're here with us, don't forget to enjoy this gorgeous island filled with beaches, breathtaking sunsets, cultural activities, and friendly people!

A handwritten signature in blue ink that reads "Mark Taylor". The signature is fluid and cursive, with the first name "Mark" and last name "Taylor" clearly legible.

Mark Taylor, SERC-NAHRO President

# 2019 SERC-NAHRO

## 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:

- 2019 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://mv.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



## Registration

The Registration Desk is in the Ballroom Foyer:

Sunday, November 3

1:00 p.m. until 6:00 p.m.

Monday, November 4

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 Reception on Monday evening and the Breakfast on Tuesday morning. Extra tickets may be purchased at the Registration Desk. Ticket prices are:

Saturday Reception	\$100.00
Sunday Reception	\$100.00
Tuesday Breakfast	\$ 60.00

# **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) website. The Professional Development Committee members responsible for this workshop are:

### **Jan Piersol**

Vice President for Professional Development  
Newberry Housing Authority  
3589 Grant Avenue – Newberry, SC 29108  
[jan\\_piersol@yahoo.com](mailto:jan_piersol@yahoo.com)

### **Donna Lamer**

Chairperson  
Professional Development Committee  
Sumter Housing Authority  
15 Caldwell Street – Sumter, SC 29150  
[donna.lamer@sumterha.org](mailto:donna.lamer@sumterha.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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# AT-A-GLANCE

**Sunday, November 03, 2019**

## **Registration**

Registration Desk Ballroom Foyer

1:00 p.m.- 6:00 p.m.

## **Opening General Session**

Ballroom A-C

3:00 p.m. - 4:30 p.m.

## **Reception**

Basshead Deck

*(in case of inclement weather:*

*Ballroom J, East Hall)*

6:00 p.m. - 7:00 p.m.

**Monday, November 04, 2019**

## **Registration**

Registration Desk Ballroom Foyer

8:30 a.m. – 12:00 p.m.

## **Continental Breakfast**

Ballroom Foyer

7:45 a.m. – 8:45 p.m.

## **Sessions**

9:00 a.m. – 12:00 p.m.

## **Morning Break**

Ballroom Foyer

10:30 a.m. – 10:45 a.m.

## **Lunch On Your Own**

12:00 p.m. – 1:30 p.m.

# AT-A-GLANCE

**Monday, November 04, 2019**

...CONTINUED...

## Sessions

1:30 p.m. – 4:30 p.m.

## Afternoon Break

Ballroom Foyer  
3:00 p.m. – 3:15 p.m.

## Reception

Ballroom J West Hall  
6:30 p.m. – 7:30 p.m.

**Tuesday, November 05, 2019**

## Breakfast and Legislative Update

Ballroom J West Hall  
7:30 a.m. – 8:45 a.m.

## Sessions

9:00 a.m. – 12:00 p.m.

## Prize Drawing

Ballroom Foyer  
12:00 p.m.



**Sunday, November 03, 2019**

**Opening General Session**

**Ballroom A – C**

3:00 p.m. – 4:30 p.m.

**Presiding**

Jan Piersol

Vice President for Professional Development  
SERC

**Invocation**

Donald Cameron

Chief Executive Officer

Charleston Housing Authority

Charleston, South Carolina

**Presentation of Colors**

Battery Creek High School ROTC Guard

**Pledge of Allegiance**

Charles Harrington

Marion Redevelopment & Housing Authority

Marion, Virginia

**Welcome**

Robbie Littlejohn

President Elect Carolinas Council of Housing &  
Redevelopment Code Officials

Union Housing Authority

Union, South Carolina

**Greetings from NAHRO**

Georgi Banna, Esq.

Director of Policy and Program Development

**Remarks**

Mark Taylor

President

SERC

**Keynote Speaker**

Dr. Earl Suttle

Leadership Success International

Enjoying Excellence

**Conference Information**

Donna Lamer

Chairperson

Professional Development Committee

SERC

**Monday, November 04, 2019**

**Registration**

Registration Desk Ballroom Foyer

8:30 a.m. – 12:00 p.m.

**Continental Breakfast**

Ballroom Foyer

7:45 a.m. – 8:45 p.m.

**Sessions**

9:00 a.m. – 12:00 p.m.

**Morning Break**

Ballroom Foyer

10:30 a.m. – 10:45 a.m.

**Lunch On Your Own**

12:00 p.m. – 1:30 p.m.

**Sessions**

1:30 p.m. – 4:30 p.m.

**Afternoon Break**

Ballroom Foyer

3:00 p.m. – 3:15 p.m.

**Reception**

Ballroom J West Hall

6:30 p.m. – 7:30 p.m.

**Monday, November 04, 2019**

**Registration**

Registration Desk Ballroom Foyer

8:30 a.m. – 12:00 p.m.

**Continental Breakfast**

Ballroom Foyer

7:45 a.m. – 8:45 p.m.

**Sessions**

**Assisted Housing**

**The “4-1-1” R.O. S. S. Program and Reporting’s  
“DOs and DON’Ts”**

Ballroom C

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

Session will cover the basic operation of the ROSS program. To include duties of the service coordinator, collaborative partnerships, residents’ participation, case management and reporting. Come learn the 1-2-3 and A-B-C of the ROSS Program. Question and answer times will be allotted.

Presenter: **Tremayne Youmans**, ROSS Manager  
US Department of Housing & Urban Development  
*Moderator: Patricia A Allen, Thomaston Housing  
Authority*

**Commissioners**

**Public Housing Authority 101**

Sabal Palm

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

A survey of state and federal laws governing Public Housing Authority’s operations with special emphasis on procurement, Human Resources and development.

Presenters: **Lee Hill**, Shareholder  
**Torri Armstrong**, Associate  
Baker Donelson, Jackson, Mississippi  
*Moderator: Felicia Jackson, Laurel Housing Authority*

# Monday, November 04, 2019

## Sessions



### Public Housing

#### **RAD Closing...What are the Next Steps?**

Ballroom F

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

Session will cover what next steps a Housing Authority must take once a RAD closing takes place whether it is PBV or PBRA. We will also have a panel of PHAs to discuss their experiences after closing a RAD deal. A question and answers period will be allotted throughout the presentation.

Presenter: **Holly Knight**, CEO of BCG Advantage

Moderator: *Clamentine Elmore, Housing Authority of Florence*

### CR&D

#### **RAD with HUD 223 (f) Financing**

Ballroom H

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

An overview of the nuts and bolts of financing a RAD transaction with HUD's 223 (f) program. The goal of the session is to introduce the financing tool and answer the following questions: Why is it an important tool? What benefits are there for a housing authority? What is the process for filing an application? Who needs to be involved? What are the various roles? How can you set yourself up for a successful transaction? The full panel could include a consultant, lawyer, engineer, appraiser and HUD if available.

Presenter: **Holly Bray**, Senior Vice President  
Love Funding

**Wayne Stogner**, Stogner Architect

Moderator: *Alanda Richardson, Hickory Housing Authority*

Monday, November 04, 2019

## Sessions

### CR&D

#### Land Banks-Another Tool for your Redevelopment Toolbox

Ballroom H

1:30 p.m. to 4:30 p.m., including break

Effectively revitalizing distressed communities requires a significant investment of both public and private capital and a holistic strategy focused not just on affordable housing, but on how to create quality neighborhoods where families can learn, shop and play. Using these tools as strategic partnerships is key for municipalities dealing with blight. Learn more about taking control of problem properties and redeveloping them in a manner consistent with public interest and community need.

Presenter: Membership of Charleston Urban Land Institute

*Moderator: Beth Brown, Gainesville Housing Authority*

### Financial Management

#### Internal Controls, Cash Management & Record Retention

Ballroom D

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

Mary Kern, CPA for multiple Housing Authorities in the state of WV, will present training that will be useful to new or seasoned finance staff, as well as new ED's. The session will cover Internal Controls, Cash Management for Public Housing and the Housing Choice Voucher Program, Records Retention requirements, and will provide ample time for Questions and Answers.

Presenter: **Mary Kern**, CPA

*Moderator: Cindy Harrington, Bluefield, WV*

# Monday, November 04, 2019

## Sessions

### Maintenance

#### Air Conditioning Mechanical and Electrical

Ballroom G

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

This 3-hour session is an introduction and overview for HVAC technicians no matter his or her skill level Air conditioning systems and the fundamentals of the refrigeration cycles will be discussed. It will cover the 4 major components of an AC system, how they work and how to maintain them. Topics covered in this class will include: Safety procedures, Preventative Maintenance and troubleshooting common problems.

Presenter: **Chad Peck**, Training Specialist, HD Supply

*Moderator: Joe Wisniewski, Augusta Housing Authority*



### Maintenance

#### R-410 and other Refrigerants

Ballroom G

1:30 p.m. – 4:30 p.m., including breaks

This 3-hour class addresses and answers many of the questions about the current transition from traditional R-22 to new alternative refrigerants including R-410A, MO-99 and other regional options. This course will address issues surrounding the difference in operating pressures and lubricants, how new equipment can impact equipment choices, tools and servicing. Topics covered will include: Safety, Properties of R-410 to R22 and Alternatives. Conversions from R-22 to R-410A, Interfacing old and new equipment, Service guidelines, Repair or replacement options and Proper Charging Techniques.

Presenter: **Chad Peck**, Training Specialist, HD Supply

*Moderator: Joe Wisniewski, Augusta Housing Authority*

Monday, November 04, 2019

## Sessions

### Rental Assistance Demonstration

#### Project Based Rental Assistance

Ballroom B

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

Still deciding on conversion, in the process, or already down the road--if you are converting to Project Based Rental Assistance (PBRA), learn the steps of preparing multifamily budgets and setting up the financial structure for multifamily properties. This training is targeted to Executive Directors, Board of Commissioners, and Financial staff who are considering conversion to PBRA

Presenter: **Bonitta R. Smith**, Branch Chief

Account Executive Team, US Department of HUD

*Moderator: Jason Spencer, Tennessee Valley Regional*



### Rental Assistance Demonstration

#### PBRA Questions and Answers

Ballroom B

1:30 p.m. – 4:30 p.m., including breaks

Bonitta R. Smith, along with other RAD conversion panelists, will hold a Question and Answer Session for anyone still considering conversion, already in the process, or already past the conversion process!

Presenter: **Bonitta R. Smith**, Branch Chief

Account Executive Team, US Department of HUD

*Moderator: Jason Spencer, Tennessee Valley Regional*

# Monday, November 04, 2019

## Sessions

### Small Agency Forum

#### Repositioning for Small Agencies

Ballroom E

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

Come hear how some small agencies are approaching repositioning and how they made the decisions that helped them convert. You will hear from agencies choosing to do RAD, choosing to share an Executive Director, and choosing to stay public housing. We want to help you make your own choices that drive your agency into the future.

Presenters: **Ben Washington**, Executive Director  
Vicksburg, MS

**Jeffrey Patrick**, Executive Director Morehead, KY

**Charles Harrington**, Executive Director, Marion, VA

*Moderator: Lisa Porter, Bristol Housing Authority*

## Reception

Ballroom J West Hall

6:30 p.m. – 7:30 p.m.





**Tuesday, November 05, 2019**

**Breakfast and Legislative Update**

Ballroom J  
7:30 a.m. – 8:45 a.m.

**Assisted Housing: ROSS**

Ballroom C  
9:00 a.m. – 12:00 p.m.

Continuation from Monday

**Commissioners: PHA 101**

Sabal Palm  
9:00 a.m. – 12:00 p.m.

Continuation from Monday

**Public Housing: What is next**

Ballroom F  
9:00 a.m. – 12:00 p.m.

Continuation from Monday

**Financial Management: Internal Controls**

Ballroom D  
9:00 a.m. – 12:00 p.m.

Continuation from Monday

**Maintenance**

**Team Management -Tuesday Morning**

Ballroom G  
9:00 a.m. – 12:00 p.m., including breaks

This session is designed for Property Managers and Maintenance Supervisors to take as a team. This fun and enlightening class will promote a shared responsibility between management and maintenance teams. Team leaders learn how working together helps everyone to succeed cohesively while encouraging unity of the purpose within the staff, and how collaborating and communication contributes to the overall success of the team.

Presenter: **Chad Peck**, Training Specialist  
HD Supply

*Moderator: Joe Wisniewski, Augusta Housing Authority*

**Tuesday, November 05, 2019**

**Sessions**

**Rental Assistance Demonstration**

**Review of RAD Conversion e-tool and  
Replacement Reserve - Tuesday**

Ballroom B

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

All RAD conversions are required have a completed etool and Replacement Reserve accounts maintained after conversion. D3G staff will walk you through the etool, how to understand the tool, make sure information is correct and discuss the upcoming changes HUD is making to the tool.

Presenter: **Jason Jones**, Account Director  
Dominion Due Diligence Group

*Moderator: Russell Nast, Tallapoosa Housing  
Authority*

**Small Agency Task Force**

**Building a Resilient Community with Limited  
Resources**

Ballroom E

9:00 a.m. – 10:30 a.m.

Sometimes working with people can be frustrating (this includes coworkers as well as residents). Everyone has a story, and behaviors and attitudes often give us a hint of certain chapters in someone's story. Traumatic events in the lives of people often cause behaviors that we find difficult to deal with. Understanding the causes of trauma and the effects that trauma has in the life of an individual, helps us to listen to them in such a way that we can build a connection. Our housing communities will become stronger as we help our residents to overcome the crippling effects of trauma by creating a culture of safety, empowerment, and healing. As this happens, families will become stronger. That means that our children will be stronger and much more likely to graduate from high school and college. This is huge for our housing communities both now and for future generations. Come and learn new techniques for connecting with your residents.

Presenters: **Lynn Pannell**, Resident Services Manager  
Bristol Housing Authority

*Moderator: Lisa Porter, Bristol Housing Authority*

Tuesday, November 05, 2019

## Sessions

### Small Agency Task Force

#### Partnering with Community Agencies to Increase Resources for Small PHA's

Ballroom E

10:45 a.m. – 12:00 p.m.

How non-traditional partnerships with like-minded organizations can help PHAs do more to meet the non-housing needs of their clients for a more holistic approach to ending the cycle of poverty.

Presenter: **Pauline Sturgill**, Williamson Housing Authority

**Lynn Pannell**, Resident Services Manager  
Bristol Housing Authority

*Moderator: Lisa Porter, Bristol Housing Authority*



### Legislative Updates

Ballroom I

9:00 a.m. – 12:00 p.m.

Legislative updates, major HUD budgets and regulatory issues.

Presenter: **Tim Kaiser**, Executive Director  
Public Housing Authority Directors Association

*Moderator: Donald Cameron, Charleston Housing Authority*

**Tuesday, November 05, 2019**

**Prize Drawing**

Ballroom Foyer  
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.

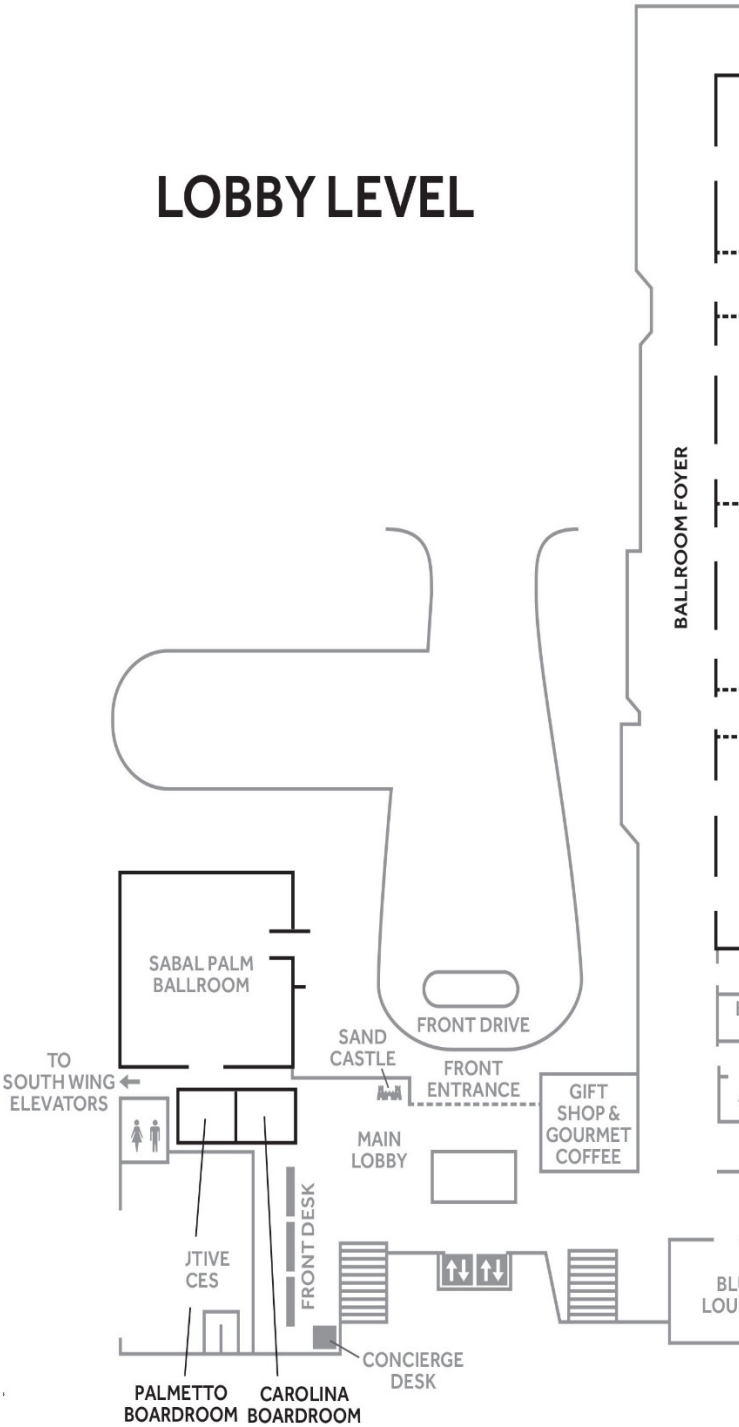


**YOU MUST BE PRESENT AT  
DRAWINGS TO BE ELIGIBLE  
FOR PRIZE AWARDS**

Tuesday, November 05, 2019

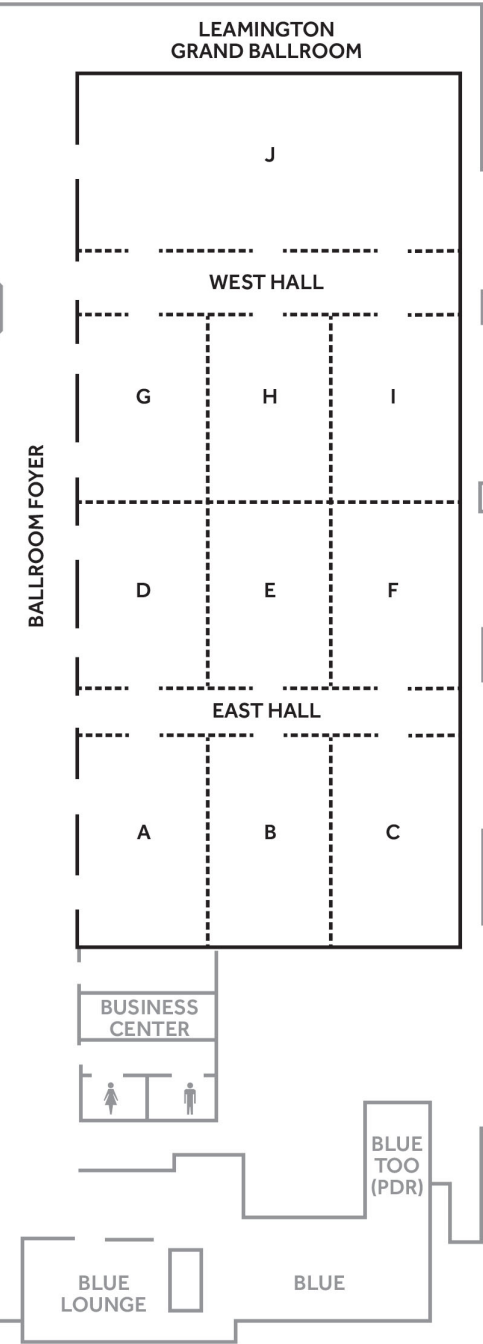
Map

LOBBY LEVEL



Tuesday, November 05, 2019

Map



Notes:

Notes:



