



2023 SERC – NAHRO Fall Workshop

November 5 – 7, 2023

Hilton Head Marriott
Resort and Spa

Hilton Head Island,
South Carolina



On behalf of the Executive Committee, I would like to take this opportunity to invite you to join us for the 2023 SERC-NAHRO Fall Workshop scheduled at the Hilton Head Marriott Resort & Spa, Hilton Head Island, SC November 5 – 7, 2023. with the theme of “Oceans of Opportunities.”

The SERC-NAHRO Professional Development Committee has been busy working on a great program for the 2023 Fall Workshop to include a variety of topics which is sure to increase our knowledge of the programs we operate.

Please review the agenda of sessions and start making your plans to join us to expand our knowledge and our networking while enjoying beautiful beaches. Thank you for choosing SERC-NAHRO.

A handwritten signature in blue ink, appearing to be 'L. J. ...'.

AGENDA

Sunday, November 5, 2023

Registration

1:00 P.M. - 6:00 P.M.

Opening General Session

3:00 P.M. - 4:30 P.M.

Reception

6:00 P.M. - 7:00 P.M.

Monday, November 6

Registration

8:30 A.M. – Noon

Continental Breakfast

7:45 A.M. – 8:45 P.M.

Sessions

9:00 A.M. – Noon

Morning Break

10:30 A.M. – 10:45 A.M.

Lunch On Your Own

Noon – 1:30 P.M.

Sessions

1:30 P.M. – 4:30 P.M.

Afternoon Break

3:00 P.M. – 3:15 P.M.

Reception

7:00 P.M. to 8:00 P.M.

Tuesday, November 7th

Breakfast, Program, and Legislative Update

7:30 A.M. – 8:45 A.M.

Sessions

9:00 A.M. – Noon

Prize Drawing

Noon

SESSIONS

PUBLIC HOUSING, ASSISTED HOUSING, & SMALL AGENCY FORUM

Housing Opportunity Through Modernization Act (AKA HOTMA) - BUT WHY HUD, WHY?

Just when we thought we had a firm grip on the program, HUD flipped the switch. BUT! Not all is lost. Join us in this class to make heads and tails of the new rule, and how to apply it to our programs and caseload.

Capital Fund Program (CFP) & Energy Performance Information (EPIC):

The Capital Fund Program provides funds, annually, to Public Housing Agencies (PHAs) for the development, financing, and modernization of public housing developments and for management improvements. HUD has moved the management of Capital Funds to a more paperless process through using the Energy Performance Information Center (EPIC). PHAs are required to manage their Capital Fund grants in EPIC. These sessions are presented by HUD staff from the Office of Capital Improvements, which oversees the award of more than \$3 billion annually in Capital Funds to PHAs nation-wide and non-formula grants, including Emergency/Disaster Capital Fund Grants, Emergency Safety & Security Capital Fund Grants, Lead-Based Paint Capital Fund Grants, and Housing-Related Hazards Capital Fund Grants. Participants should attend all three sessions covering Capital Fund & EPIC, as each session will build upon the last.

Session 1: Introduction to The Capital Fund Planning Process & EPIC

In this breakout session, participants will become acquainted with the Capital Fund planning principles and necessary steps behind the workflows in EPIC. PHAs are responsible for the long-term viability of the PHA and its properties. The Capital Fund plays a pivotal role in financing activities to achieve the PHA's mission and goals as it concerns their public housing properties. Annually PHAs are also required to complete the Capital Fund Submission and planning is major component, which is largely completed in EPIC. We will provide an overview of each of the modules in EPIC and explain how they relate to the Capital Fund submission and planning process.

Family Self Sufficiency Program Operation

Review of the FSS regulatory changes from May 17, 2022, final rule and HUD guidance on FSS Action Plan, the impact of HOTMA to the FSS rent calculation.

CR&D

CR&D – Section 18/RAD or a Blend - Repositioning Options for PHAs

Join representatives from HUD's Special Applications Center and Office of Recapitalization to discuss repositioning options for PHAs. RAD is not your only option, get a better understanding of the role of the SAC office and how you can use Section 18 to foster redevelopment. For PHAs who are interested in RAD, get updates from HUD experts on the new RAD notice and learn the pros and cons of converting under the RAD program. HUD staff will also be available for "office hours" so bring specific questions and sign up to speak one on one with a HUD expert.

Capital Fund Program (CFP) & Energy Performance Information (EPIC):

Session 2: Capital Fund Eligible Activities, Reporting Requirements & EPIC

In this breakout session, we will also cover different budget line items and which activities are eligible under the Capital Fund and how fulfill the reporting requirements in EPIC. We will review each module in EPIC. For example, we will learn how to submit a document package and the 5-year action plan. Participants will also learn about making revisions to the 5-Year Action Plan and Annual Statement/Budget.

Session 3: Capital Fund Grant Lifecycle & EPIC

In this breakout session, participants will learn about the importance of Capital Fund Obligation, Expenditure, and Fiscal Closeout. We will touch on procurement and contract management. This session will cover additional features in EPIC such as how to use EPIC to exercise fungibility, how to report on RAD transactions, or Debt Service Obligations. We will briefly discuss when and how to submit Performance and Evaluations Reports, and the newer features available such as Monitoring and Close-out Packages. We will cover how to use EPIC for non-formula Capital Fund Grants, including Emergency/Disaster Capital Fund Grants, Emergency Safety & Security Capital Fund Grants, Lead-Based Paint Capital Fund Grants, and Housing-Related Hazards Capital Fund Grants. Finally, we will discuss how to request to use Operating Funds for Capital Fund purposes.

CR&D – Special Applications Center – Office Hours

Join representatives from HUD's Special Applications Center and Office of Recapitalization to discuss repositioning options for PHAs. RAD is not your only option, get a better understanding of the role of the SAC office and how you can use Section 18 to foster redevelopment. For PHAs who are interested in RAD, get updates from HUD experts on the new RAD notice and learn the pros and cons of converting under the RAD program. HUD staff will also be available for "office hours" so bring specific questions and sign up to speak one on one with a HUD expert.

Portfolio Evaluation and Strategic Planning

The goal of this session is to provide a framework for the review of a PHA's assets to determine a potential feasible plan for the future. The Plan will be based on Housing Authority input, needs and your goals. You will learn methods for maximizing ALL your resources and evolving

to the next level of less HUD oversight and appropriate-ABLE funds. This plan could be one large project or phased in multiple, successive projects. This discussion includes reviewing potential repositioning options including RAD, Section 18 and additional blend options under Notice PIH 2021-07. This also includes analyzing new sites for the construction of additional units, create financial proformas with potential options including rehab and new construction, as well as the 9% low-income housing tax credit, 4% low-income housing tax credit, historic credits, other soft sources funds (HOME, CDBG, Trust Fund, ARPA, etc.) or debt only.

This path including reviewing your:

- Review the portfolio (audited financials, operational performance, reports on property operation, available land, physical condition, environmental impact, and valuation)
- Convey options for properties with any EPC loans outstanding
- Compare and contrast the pros and cons of rehab vs. new construction
- Review transfer of assistance options surrounding new construction
- Assess the benefits of RAD, RAD/Section 18 blends, Section 18, or Streamlined Voluntary Conversion
- Compare and contrast the pros and cons of utilizing debt and/or equity, including conventional debt, equity such as low income housing tax credits, and various soft sources of funds
- Prepare financial projections and a detailed feasibility analysis
- Deliver a recommendation to you and your board for repositioning that incorporates your vision and goals

Capital Fund & EPIC Office Hours:

Come join the HUD staff that presented the Introduction to the Capital Fund Planning and EPIC reporting requirements on Monday. Today will provide you with the technical assistance part of complying with these programs.

Capital Funds and EPIC are critical to you and your authority for your management, operating and modernization needs. As you learned, HUD has moved the management of Capital Funds to a more paperless process through using the Energy Performance Information Center (EPIC). PHAs are required to manage their Capital Fund grants in EPIC. This session is presented by HUD staff from the Office of Capital Improvements, which oversees the award of your annual Capital Funds, including Emergency/Disaster Capital Fund Grants, Emergency Safety & Security Capital Fund Grants, Lead-Based Paint Capital Fund Grants, and Housing-Related Hazards Capital Fund Grants.

Participants should attend this session to discuss the technical assistance needed to process your Capital Fund & EPIC requirements.

COMMISSIONERS

Understanding the roles of Commissioners & Executives

This session is designed to aid commissioners in understanding their role, as well as the role of the Executive Director. Understanding these roles sometimes has the potential of being confusing when you are responsible, but not handling the day-to-day operations.

FINANCIAL MANAGEMENT

Financial Training for non-financial personnel Commissioners are encouraged to attend

Update from Last Year: Overview of Financial Reporting – What to look for in Financial Statements, Ethics in Housing – Fraud, Waste and Abuse. Policies & Procedures in depth. Procuring Audit Services- -Commissioner’s role in process, receiving a meaningful audit.

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Ethics in Housing – Fraud, Waste and Abuse. Internal Controls – Cyber Security IT Controls. Procuring Audit Services- -Commissioner’s role in process, receiving a meaningful audit.

This session will provide a comprehensive review of required Policies and Procedures from a financial and internal control perspective.

MAINTENANCE

HVAC A to Z with coverage of the upcoming changes in refrigerant. Three sessions in total

Explanation and testing of the components of the HVAC system. Complete coverage of the refrigerant flow, charging and electrical theory and operations. And Preventative maintenance and other best practices.

MULTIFAMILY

Multifamily - Navigating reserve for replacement request in PBRA

Thinking of converting to the Rental Assistance Demonstration “RAD” or for those who have recently converted. Do you know the process for replacement requests? Do they have to be approved by multifamily of HUD?

LEGISLATIVE UPDATES



“Experience the best of Hilton Head Island from Marriott Hilton Head Resort & Spa. Ideally situated directly on the beach - with more ocean view guest rooms than any other Island resort - our welcoming hotel is the perfect choice for every traveler. Discover endless opportunities for fun, from playing one of three PGA golf courses, swimming on the beach or in our indoor and outdoor pools, playing tennis and going for bike rides to unwinding at our exquisite spa. Savor fresh seafood and South Carolina favorites at Blue or sip cocktails at one of our seasonal cafes. If a business event or social gathering brings you to our Hilton Head resort, you’ll find contemporary meeting venues, including the area’s largest ballroom, outdoor spaces and a host of superior services and amenities. When it’s time to relax, our inviting rooms and suites await, each with a private balcony and thoughtful touches. Whether visiting for work or enjoying a beach vacation, we look forward to making your stay at our Hilton Head resort exceptional.”

- Marriott Hilton Head Resort & Spa website.

Reservations must be booked no later than October 12th
to receive the group rate of \$184.00 per night.

<https://www.marriott.com/event-reservations/reservation-link.mi?id=1679419156044&key=GRP&app=resvlink>

or call 1-843-686-8400 and mention the SERC-NAHRO block.