



Fall Conference

HILTON POLARIS HOTEL
COLUMBUS, OHIO
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CMHPOLF-HILTON-COLUMBUS-POLARIS/](http://WWW.HILTON.COM/EN/HOTELS/CMHPOLF-HILTON-COLUMBUS-POLARIS/)

2024



**SEPTEMBER
18TH - 20TH**

WEDNESDAY, SEPTEMBER 18TH

8:00 a.m. – 4:30 p.m.

REGISTRATION

9:00 a.m. – 4:30 p.m.

TRACK A: RENT CALCULATION WITH HOTMA CHANGES FOR HCV & PUBLIC HOUSING

** Additional Cost & Pre-registration required; Additional Cost: \$100 – Optional Certification Exam: \$50*

Presenter: Dennis Morgan, DL Morgan & Associates

Lunch provided

HOTMA-Housing Opportunity Through Modernization ACT has and will continue to change the daily operations of Public Housing and HCV with an effective date of implementation of January 1, 2025. This workshop will cover the latest implementation guidance for HOTMA, for the new annual income determination, new income exclusions, new assets and income from assets, new adjusted income and deductions, hardship determinations, new phase-on for medical and disability expenses, deduction hardships, TTP, HAP, rent, tenant rent and more. This workshop will be conducted by Dennis Morgan, who is no stranger to the assisted housing providers. Dennis brings over 52 years of assisted housing experience, he is a nationally recognized trainer, author of HUD Guidebooks and consultant who also serves as a faculty member for NAHRO.

9:00 a.m. – 4:30 p.m.

TRACK B: PHA FINANCIAL UPDATE

** Additional Cost & Pre-registration required; Additional Cost: \$100*

Presenter: Jason Casterline, CPA/Partner, Housing Consultants USA, LLC

Lunch provided

- Public Housing Accounting and Reporting update
- Section 8 Accounting and Reporting update / eVMS
- Financial Data Schedule (FDS) and REAC update
- GASB Update - new and upcoming accounting changes and standards
- Various other PHA financial update topics

1:00 p.m. – 3:00 p.m.

S.H.A.R.P. MEETING

3:15 p.m. – 4:15 p.m.

DIRECTORS' MEETING

4:30 p.m. – 6:30 p.m.

WELCOME RECEPTION ON THE PATIO

ENTERTAINMENT: D.J. KINGS

7:00 a.m. – 4:30 p.m.

REGISTRATION

7:00 a.m. – 10:00 a.m.

EXHIBITOR SET-UP

7:30 a.m. – 9:00 a.m.

BREAKFAST BUFFET

9:00 a.m. – 4:30 p.m.

CONCURRENT SESSIONS

9:00 a.m. – 4:30 p.m.

TRACK A: RENT CALCULATION WITH HOTMA CHANGES FOR HCV & PUBLIC HOUSING - CONTINUED

** Additional Cost & Pre-registration required; Additional Cost: \$100 – Optional Certification Exam: \$50*

Presenter: Dennis Morgan, DL Morgan & Associates

9:00 a.m. – 4:30 p.m.

TRACK B: PHA FINANCIAL UPDATE - CONTINUED

** Additional Cost & Pre-registration required; Additional Cost: \$100*

Presenter: Jason Casterline, CPA/Partner, Housing Consultants USA, LLC

9:00 a.m. – 4:30 p.m.

TRACK C: "SHORTFALL TRIAGE"

Presenters: Cleveland HUD Office

- *2-Year Tool*
- *Strategy for Utilization*
- *VMS*
- *Shortfall*

9:00 a.m. – 4:30 p.m.

TRACK D: FSS TRAINING; TRAUMA INFORMED CARE & SUPPORTIVE SERVICE COORDINATION

** Additional Cost & Pre-registration required; Additional Cost: \$100*

Presenters: Douglas Mackbee, Senior Program Manager, Corporation for Supportive Housing (CSH)

Amanda Rodriguez, Program Manager, Corporation for Supportive Housing (CSH)

Trauma Informed Care: *an approach to various aspects of one's life that recognizes and responds to the impact of trauma on an individual, ensuring that services are delivered in a way that is sensitive to their trauma history. It focuses on safety, trustworthiness, choice, collaboration, and empowerment to support healing and avoid re-traumatization.*

Service Coordination: *an engagement approach to managing various aspects of an individual's support and care that ensures services are seamlessly integrated and tailored to their unique needs. It focuses on accessibility, continuity, communication, advocacy, and individualized planning to support holistic well-being and ensure that all services work together effectively for the benefit of the individual.*

9:00 a.m. – 4:30 p.m.

TRACK E: HUMAN RESOURCE TRAINING

Presenter: Drew Esposito, Director of Operations/Shareholder, Clemans Nelson & Associates

- *Hiring & Retention of Employees*
- *Department of Labor Changes (exempt vs. nonexempt)*
- *Other HR Issues*

12:00 p.m. – 1:00 p.m.

LUNCHEON

4:30 p.m. – 6:00 p.m.

VENDOR RECEPTION – *VENDOR BINGO DRAWING*

FRIDAY, SEPTEMBER 20TH

7:30 a.m. – 12:00 p.m.

REGISTRATION

7:30 a.m. – 9:00 a.m.

BREAKFAST BUFFET

9:00 a.m. – 12:00 p.m.

CONCURRENT SESSIONS

9:00 a.m. – 12:00 p.m.

TRACK A: RENT CALCULATION WITH HOTMA CHANGES FOR HCV & PUBLIC HOUSING - CONTINUED

** Additional Cost & Pre-registration required; Additional Cost: \$100 – Optional Certification Exam: \$50*

Presenter: Dennis Morgan, DL Morgan & Associates

1:00 p.m. – 3:00 p.m.

TRACK A: RENT CALCULATION OPTIONAL EXAM

Additional Cost: Optional Certification Exam: \$50

Lunch provided for those taking the exam (12:00 p.m. – 1:00 p.m.)

9:00 a.m. – 12:00 p.m.

TRACK B: AUDITOR OF STATE PANEL

Moderator: Stan Popp, Interim Director, Ironton MHA & OHAC AOS Committee Member

(See detailed description below)

9:00 a.m. – 12:00 p.m.

TRACK C: HOUSING CHOICE VOUCHER (HCV) ROUND TABLE

Moderator: Jonathan Zimmerman, Partner, Section Eight Associates, LLC

9:00 a.m. – 12:00 p.m.

TRACK D: FSS ROUND TABLE

Presenters: Douglas Mackbee, Senior Program Manager, Corporation for Supportive Housing (CSH)

Amanada Rodriguez, Program Manager, Corporation for Supportive Housing (CSH)

9:00 a.m. – 12:00 p.m.

TRACK E: RISK MITIGATION

Presenter: George Best, Gallagher

This session will cover some of the preventive measures HA's can take to reduce risk and therefore likely lower loss

histories: this leads to better outcomes for the insured. This session will include property, auto, and high-level liability risk areas.

Target Audience: Executive Directors, Finance Staff, Property Managers, Asset Managers, Maintenance Managers & Housing Managers.

12:00 p.m.

END OF CONFERENCE

HOTEL INFORMATION

THE HILTON COLUMBUS/POLARIS HOTEL

8700 Lyra Drive

Columbus, Ohio 43240

<https://www.hilton.com/en/hotels/cmhpohf-hilton-columbus-polaris/>

You may make room reservations by telephoning the hotel directly at (614) 885-1600 and request the Reservations Department. Be sure to let the Reservation Agent know you are with the group, **"2024 Ohio Housing Authorities Fall Conference"** to receive the group rate of **\$164 for Hilton Columbus/Polaris Hotel**. You may make hotel reservations on-line as well. Here is your link for the guest rooms:

<https://www.hilton.com/en/attend-my-event/cmhpohf-93y-76a55f6a-7141-444e-91d1-15ff39ce2409/>

The Deadline for making room reservations is **Sunday, August 27, 2024**. After August 27th, reservations are on a "first-come-first-served" basis and may not be available at the group room rate. You will need a tax-exempt form to present to the hotel agent at the time of check-in.

TRACK B: AUDITOR OF STATE (AOS) PANEL

Friday, September 20th

9:00 a.m. – 12:00 p.m.

Moderator: Stan Popp, Interim Director, Ironton MHA & OHAC AOS Committee Member

- **HUD Panelist(s)**
 - **Describe the federal regulatory requirements for annual PHA financial reporting and compliance**
 - *Code of Federal Regulations*
 - *OMB Guidance*
 - *Reporting process/format of the Financial Data Schedule (FDS) to HUD*
 - *Reporting timeline of the FDS*
- **AOS Panelist(s)**
 - **Describe the state regulatory requirements, structure and responsibilities of the AOS in general**
 - *Ohio Revised Code*
 - *Organization (Central-Columbus and Field Offices)*
 - *Central functions*
 - *Field office functions*
 - *Tools/Resources*
 - *Reference materials, including compliance supplements*
 - *Training/Offerings*
 - *Liaisons*
 - *Other resources and services*
 - *Priorities*
 - *Overall Audit Plan*
 - *Short term*
 - *Long term*
 - *PHA Audits*
 - *Current status*
 - *Future plans*
 - *AOS versus IPA*
 - **How should Ohio PHAs prepare for an AOS audit**
 - *Necessary resources and planning to achieve HUD submission deadlines*
 - *Does an AOS audit differ from an IPA audit? If so, how*
 - *Differences by region*
 - *What are the primary areas of focus*
 - *Transactional*
 - *Compliance*
 - *Other*
 - *What is the AOS's materiality threshold*
 - *How does an Ohio PHA achieve a "clean" audit*
 - *What is the AOS award and what criteria must be met to receive it*
 - **How are AOS audit costs determined**
 - **What can OHAC and/or PHA auditees do to make the audit process more productive for both sides**