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Florida Association of Housing and Redevelopment Officials

# Fahroland

Affordable  
Housing Kingdom

August 11-13, 2015

Disney's Yacht Club & Resort

Lake Buena Vista, FL



Benefits of Attending

- Networking
- Education
- Advocacy
- Trade Show





The non-profit association representing the officials providing affordable housing in Florida.

August 11, 2015

Dear FAHRO Members and Guests:

Allow me to be the first of many to welcome you to FAHRO's 2015 Annual Convention and Trade Show as we return to the magical Disney's Yacht Club Resort in Orlando, Florida. The theme for this year's convention is "FAHROland: Affordable Housing Kingdom" and we are jazzing up the exhibit hall with booth themes based on the different attractions at Disney's Magic Kingdom. When you step into the exhibit hall, you will be instantly transported to another land, FAHROland!



Once again, the FAHRO staff, members and volunteers have scheduled a wonderful mix of seminars and presentations designed to educate and inform attendees. In addition to FAHRO members serving as both guest speakers and moderators, we have outside consultants that are experts in their field, along with HUD Officials that will both provide up-to-date information on the ever changing public housing industry.

We have continued to expand our tracks to cover a wider variety of topic areas and employees in your agency, to include: PHA development, residents, small PHAs, HUD programs, maintenance, and commissioners. I am particularly excited about our full track on development. There will be two different panels discussing the foundation of development and advanced development, which will include some of the industry's top experts on PHA development! Take advantage of the expertise in the room by attending as many sessions as you can.

During the 2015 Annual Conference, I encourage you to not only attend the sessions and take part of the wonderful programming we have provided but also meet and greet with your peers. Combined, the FAHRO membership has centuries worth of experience in public housing! Together we can overcome any budget cuts or obstacles thrown at us.

This year we are fortunate enough to have many vendors and associate members located in the Exhibit Hall that support FAHRO with our annual conference, and in other ways throughout the year. We certainly encourage you to spend as much time between sessions visiting and talking with vendors as you learn about the latest in technology and other areas that can assist your agency in becoming more efficient and productive

Needless to say, the Disney's Yacht Club is one of the premium resorts in Florida. Take advantage of the accommodations, the variety of food and entertainment options on the property and have fun with your families and friends. I look forward to speaking with each of you during the next few days as we spend time together learning from each other and enjoying each other's company.

Sincerely,

Maria Burger, President

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& Redevelopment Officials  
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## Mission Statement

**F**AHRO is committed to the professional development of the people who provide public and assisted housing in Florida by offering a network for increased communication and education. We will continue to support legislation for the improvement and development of affordable housing and economic opportunities.



## FAHRO Committee Chairs 2015 - 2017

<b>STATE AFFAIRS</b> .....	Anthony E. Woods <i>Daytona Beach Housing Authority</i>
<b>FEDERAL AFFAIRS</b> .....	Bill Russell <i>Sarasota Housing Authority</i>
<b>SMALL AGENCY</b> .....	Brian Clark <i>New Smyrna Beach Housing Authority</i>
<b>DISASTER PREPAREDNESS &amp; RESPONSE</b> .....	Abe Singh <i>Area Housing Commission</i>
<b>COMMUNICATIONS &amp; PUBLIC RELATIONS</b> .....	Lisa Landers <i>Winter Haven Housing Authority</i>
<b>BYLAWS</b> .....	Vivian Bryant <i>Orlando Housing Authority</i>
<b>SCHOLARSHIP</b> .....	Ellen Ramsey <i>Jacksonville Housing Authority</i>
<b>AWARDS</b> .....	Catherine Reddick <i>Bartow Housing Authority</i>
<b>DEVELOPMENT</b> .....	Jane Dixon <i>Tallahassee Housing Authority</i>
<b>EDUCATION</b> .....	Ann Deibert <i>Broward County Housing Authority</i>
<b>NOMINATIONS</b> .....	Marcus D. Goodson <i>Housing Authority of City of Ft Myers</i>
<b>BUDGET &amp; AUDIT</b> .....	Debbie Martin <i>Pinellas Housing Authority</i>
<b>STRATEGIC PLANNING &amp; MANAGEMENT</b> .....	Maria A. Burger <i>Housing Authority of the City of Stuart</i>
<b>FRAUD ABATEMENT</b> .....	Becky-Sue Mercer <i>Arcadia Housing Authority</i>
<b>ASSOCIATE MEMBER ADVISORY COUNCIL</b> .....	Maria A. Burger <i>Housing Authority of the City of Stuart</i>

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<b>BASKETBALL TOURNAMENT</b> .....	Kevin Knox <i>Tampa Housing Authority</i>
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1942 – 1943	James T. Daniels	1971 – 1972	Ralph Carey
1943 – 1944	James G. Bendingfield	1972 – 1973	Howard Harris
1944 – 1945	Ray O. Edwards	1973 – 1974	Joseph Kelley
1945 – 1946	Wallace B. Kirke	1974 – 1975	Calvin P. Ogburn
1946 – 1947	Emil A. Nordstrom	1975 – 1976	John Van Ness
1947 – 1948	Colin Murchison	1976 – 1977	Frank C. Chavers
1948 – 1949	George M. White	1977 – 1978	Dean S. Robinson
1949 – 1950	Thomas A. Dyer	1978 – 1979	Nan Gordon
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1955 – 1956	Earl J. Pound	1984 – 1985	Mike Rogers
1956 – 1957	Philip R. McGowin	1985 – 1986	Juanita Holloway
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1958 – 1959	Gordon L. Bradley	1987 – 1988	Roger Braun
1959 – 1960	Gardmer E. Dickinson	1988 – 1989	Larry Shoeman
1960 – 1961	Haley Sofge	1989 – 1990	Deborah Vincent
1961 – 1962	S. E. Lorimier	1990 – 1991	Robert Rogers
1962 – 1963	James W. Van	1991 – 1992	Marilyn Phillips
1963 – 1964	George W. Lubke	1992 – 1993	Jean Kelly
1964 – 1965	George W. Lubke	1993 – 1994	Karen Godley
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1967 – 1968	Paul S. Buckman	1996 – 1997	Lynda Hinckley
1968 – 1969	Gerald E. Metko	1997 – 1998	Dorothy Sasser
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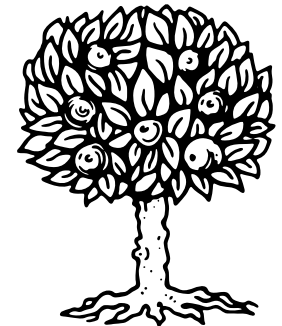
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Dick Bowers	Calvin Ogburn	Ronnie Ferguson
R. G. Boyd	Alice Oldham	George Stakley
Rev. Carl Brinkley	H. Vann Rhodes	Doris Thomas
Sam Brunson	Dean Robinson	
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## Special Events

### WELCOME RECEPTION

TUE, August 11<sup>th</sup> 5:30 PM – 7:30 PM

### MEMBER APPRECIATION RECEPTION

WED, August 12<sup>th</sup> 5:30 PM – 7:30 PM



### FAHRO ANNUAL CELEBRATION COCKTAIL PARTY & BANQUET

THU, August 13<sup>th</sup> 7:00 PM – 10:30 PM

### EXHIBIT HALL HOURS *(open only during breaks and functions)*

TUE, August 11<sup>th</sup> 5:30 PM – 7:30 PM

WED, August 12<sup>th</sup> 8:00 AM – 7:30 PM

THU, August 13<sup>th</sup> 8:00 AM – 3:00 PM

**R**eceptions & Banquet are included in full registrations; Wednesday and Thursday only tickets include all events taking place the day of the purchased ticket only. Please note that all attendees must present their ticket when they enter the reception or banquet room. Additional tickets may also be purchased at the registration desk.

## Exhibit Hall Participation Drawing

**E**very registrant receives a passport at registration. Completed passports will be drawn for prizes. Drawing will be held at banquet – must be present to win. There will be 3-5 gift certificate prizes of varying amount.

## UNCF/Deborah L. Vincent Charity Breakfast Bingo

**B**reakfast Bingo Sponsor is the M/C for the Bingo event. Cards sell for \$5 each and are good for two rounds of Bingo. First person to get Bingo splits the winnings.

## UNCF/Deborah L. Vincent Charity Silent Auction

**T**o be held during exhibit times. Will either be held in Foyer or Exhibit Hall based on space. Do not have to be present to win. Auction will close at 2:45 PM on Thursday, August 13<sup>th</sup>. Winners announced at banquet.

## Sponsors



## Schedule at a Glance

### TUESDAY, AUGUST 11, 2015

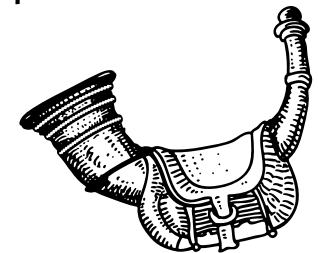
4:00 PM		
5:00 PM	<b>Registration Desk Open</b> Asbury Registration Desk/Rotunda	<b>FAHRO Welcome Reception</b> Grand Harbor Ballroom South & Salons 5-8 <i>Sponsor: Duke Energy</i>
6:00 PM		
7:00 PM		
8:00 PM	<b>Hospitality Suite</b> Grand Harbor Ballroom South & Salons 5-8 <i>Sponsor: GSA Screens</i>	
12:00 AM		

## Schedule of Events

### TUESDAY, AUGUST 11, 2015

- 4:00 PM – 7:30 PM **Registration Desk Open**
- 5:30 PM – 7:30 PM **FAHRO Welcome Reception**
- 8:00 PM – 12:00 AM **Hospitality Suite**  
*Sponsor: GSA Screens*

- I Innovation
- H HUD Programs
- D Development
- C Commissioner
- M Maintenance



### WEDNESDAY, AUGUST 12, 2015

- 8:00 AM – 4:00 PM **Registration Desk Open**  
*Location: Asbury Registration Desk/Rotunda*
- 8:00 AM – 7:30 PM **Exhibits open during meals and breaks**
- 8:00 AM – 9:00 AM **Networking Continental Breakfast (Exhibit Hall)**  
*Location: Grand Harbor Ballroom South & Salons 5-8*
- 9:00 AM – 10:00 AM **Opening General Session**  
*Location: Asbury Hall B-D*  
*Moderator: Maria Burger, FAHRO President*  
*Speakers: Secretary Julian Castro, HUD*  
*Preston Prince, NAHRO President*  
*Dave Baldwin, SERC Senior Vice President*

## Schedule at a Glance

### WEDNESDAY, AUGUST 12, 2015

8:00 AM	<b>Networking Continental Breakfast (Exhibit Hall)</b> Grand Harbor Ballroom South & Salons 5-8		Exhibits open during meals and breaks	Registration Desk Open
8:30 AM				
9:00 AM	<b>Opening General Session</b> Asbury Hall B-D			
9:30 AM				
10:00 AM	<b>Early Childhood Education &amp; Grade Level Reading</b> Asbury Hall B-D			
10:30 AM				
11:00 AM	<b>Networking Break (Exhibit Hall)</b> • Grand Harbor Ballroom South & Salons 5-8			
11:30 AM	<b>Annual Business Meeting</b> Asbury Hall B-D			
12:00 PM				
12:30 PM	<b>Networking Lunch (Exhibit Hall)</b> Grand Harbor Ballroom South & Salons 5-8 <i>Sponsor: Duke Energy</i>			
1:00 PM				
1:30 PM	<b>State &amp; Federal Affairs Update and Discussion</b> Asbury Hall B-D			
2:00 PM				
2:30 PM	<b>Networking Break (Exhibit Hall)</b> • Grand Harbor Ballroom South & Salons 5-8			
3:00 PM	<b>VASH Voucher Program Management</b> Asbury Hall B <i>Sponsor: Duke Energy</i>	<b>Safeguarding Your Communities</b> Asbury Hall C <i>Sponsor: Duke Energy</i>		
3:30 PM				
4:00 PM				
4:30 PM	<b>Re-Thinking &amp; Rebranding Affordable Housing Communities</b> Asbury Hall B • <i>Sponsor: Duke Energy</i>	<b>Taking Care of Your Team</b> Asbury Hall C <i>Sponsor: Duke Energy</i>		
5:00 PM				
5:30 PM				
6:00 PM	<b>Member Appreciation Reception (Exhibit Hall)</b> Grand Harbor Ballroom South & Salons 5-8 <i>Sponsor: TAG Associates, Inc.</i>			
6:30 PM				
7:00 PM				
7:30 PM				
8:00 PM	<b>Hospitality Suite</b> Captain's Deck #1116 <i>Sponsor: GSA Screens</i>			
12:00 AM				

### WEDNESDAY, AUGUST 12, 2015 (CONT.)

#### 10:00 AM – 11:00 AM **Early Childhood Education & Grade Level Reading**



**Location:** Asbury Hall B-D  
**Moderator:** William Russell, *Sarasota Housing Authority Executive Director*  
**Speakers:** Ralph Smith, *National Campaign for Grade Level Reading*  
Preston Prince, *NAHRO President*

Many of our children who come from low education-level parents start kindergarten behind their peers in terms of vocabulary and basic brain development. Most of these kids never catch up through the basic class structure, therefore they fall further behind and are unable to enjoy school or see it as a real opportunity for them to grow. Little attention, understanding, and effort has been made in this critical area, leaving our youth at risk to perpetually fail. This session will discuss how housing authorities can help break the cycle of poverty by preparing young children to read at grade level.

#### 11:00 AM – 11:30 AM **Networking Break (Exhibit Hall)**

**Location:** Grand Harbor Ballroom South & Salons 5-8

#### 11:30 AM – 12:30 PM **Annual Business Meeting**

**Location:** Asbury Hall B-D

#### 12:30 PM – 1:30 PM **Networking Lunch (Exhibit Hall)**

**Location:** Grand Harbor Ballroom South & Salons 5-8

**Sponsor:** Duke Energy

#### 1:30 PM – 2:30 PM **State & Federal Affairs Update and Discussion**

**Location:** Asbury Hall B-D  
**Speakers:** Anthony Woods, *FAHRO State Affairs Chair*  
Oscar Anderson, *FAHRO State Affairs Consultant*  
Bill Russell, *FAHRO Federal Affairs Chair*  
Scott Keller, *FAHRO Federal Affairs Consultant*

#### 2:30 PM – 3:00 PM **Networking Afternoon Break (Exhibit Hall)**

**Location:** Grand Harbor Ballroom South & Salons 5-8

#### 3:00 PM – 4:30 PM **VASH Voucher Program Management**



**Location:** Asbury Hall B  
**Speakers:** Nikki Barfield, *VA Orlando*  
Carrie Mayo-Owens, *VA Clearwater*  
**Sponsor:** Duke Energy

Veterans Affairs Supportive Housing or VASH vouchers have become a much sought-after and critical part of a balanced housing management program for public housing agencies. Not only does it provide much-needed assistance to veterans in our communities, but it also provides vital a mn fees to fund agency operations. This session will focus on the essential partnership with the Veterans Administration in managing the program successfully.





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• **Venetian Walk** - 61 Unit Senior Development - Venice, FL  
LEED Gold, Water Star, Florida Yards & Neighborhoods Certifications

• **Landings at Cross Bayou** - 184 Unit Family Renovation - St. Petersburg, Florida  
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Pinellas Heights



Venetian Walk

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**WEDNESDAY, AUGUST 12, 2015 (CONT.)**

3:00 PM – 4:30 PM **I Safeguarding Your Communities**



**Location:** Asbury Hall C  
**Speakers:** Laurel Robinson, *West Palm Beach Housing Authority*  
Shirley Johnson-Delgado, *School Choice Services*

**Sponsor:** Duke Energy  
Providing an environment that is safe and supportive is a key component of every affordable housing community. This session will cover security and risk management options in the face of dwindling grants and other funding sources, as well as responsibilities related to the Violence Against Women Act and combatting truancy.

4:30 PM – 5:30 PM **I Re-Thinking & Rebranding  
Affordable Housing Communities**



**Location:** Asbury Hall B  
**Speakers:** Lisa Landers, *Winter Haven Housing Authority*  
Lillian Stringer, *Tampa Housing Authority*

**Sponsor:** Duke Energy  
We have all started explaining what we do, only to have the listener respond by using the “p-word” to describe our communities. It’s unfair. It’s inaccurate. It’s NIMBYism. It’s perception...and that makes it reality – until WE change it! This session will examine what we can and must do as an industry to reframe the perception of the industry. Be a part of the discussion that will launch FAHRO’s re-branding campaign for Florida’s public housing agencies!

4:30 PM – 5:30 PM **I Taking Care of Your Team**



**Location:** Asbury Hall C  
**Speakers:** Tim McGhee, *Leading Edge*  
Roy Lantz, *Broward County Housing Authority*  
Larry Shoeman, *Avon Park Housing Authority*

**Sponsor:** Duke Energy  
Austere budgets often mean that tough decisions have to be made. In this challenging environment, we have to retain quality people who often have to manage an excessive workload as we lack the resources to add staff. However, we don’t always have the resources to offer the benefits we wish we could either. What to do? This session will explore options and strategies for taking care of your team on a limited budget and keeping those key workers in place.

5:30 PM – 7:30 PM **Member Appreciation Reception (Exhibit Hall)**

**Location:** Grand Harbor Ballroom South & Salons 5-8  
**Sponsor:** TAG Associates, Inc.

8:00 PM – 12:00 AM **Hospitality Suite**

**Location:** Captain’s Deck #1116  
**Sponsor:** GSA Screens



# Schedule at a Glance

## THURSDAY, AUGUST 13, 2015

8:00 AM	<b>Scholarship Bingo Continental Breakfast</b> Grand Harbor Ballroom South & Salons 5-8			
8:30 AM				
9:00 AM	<b>REAC Scoring Methodology</b>	<b>Foundations for Development</b>	<b>HUD Inspector General: Ethics &amp; Key Issues</b>	<b>Electrical Training – Part I</b>
9:30 AM	H Asbury Hall A	D Asbury Hall B TAG Associates, Inc.	C Asbury Hall C Duke Energy	M Asbury Hall D HD Supply
10:00 AM	<b>Networking Lunch (Exhibit Hall)</b> Grand Harbor Ballroom South & Salons 5-8			
10:30 AM	<b>HUD Streamlining Rule – What Happens Next?</b>	<b>Introduction to Mixed Finance for PHAs</b>	<b>Legal Issues for PHA Commissioners</b>	<b>Electrical Training – Part II</b>
11:00 AM	H Asbury Hall A	D Asbury Hall B Sponsor: TAG Associates, Inc.	C Asbury Hall C Sponsor: Duke Energy	M Asbury Hall D Sponsor: HD Supply
11:30 AM				
12:00 PM	<b>Networking Lunch (Exhibit Hall)</b> Grand Harbor Ballroom South & Salons 5-8 Sponsor: Duke Energy			
12:30 PM				
1:00 PM	<b>We're A Small Agency After All... And Succeeding!</b>	<b>Advanced Development – Ask The Experts!</b>	<b>PHA Financial Oversight</b>	<b>HVAC Training: Mechanical &amp; Electrical – Part I</b>
1:30 PM	H Asbury Hall A	D Asbury Hall B Sponsor: TAG Associates, Inc.	C Asbury Hall C Sponsor: Duke Energy	M Asbury Hall D Sponsor: HD Supply
2:00 PM				
2:30 PM	<b>Networking Afternoon Break (Exhibit Hall)</b> Grand Harbor Ballroom South & Salons 5-8			
3:00 PM	<b>RAD Conversion – Learning from Experience</b>	<b>Service-Enriched Housing – A Model for Success</b>	<b>Strategic &amp; Business Planning for PHA Commissioners</b>	<b>HVAC Training: Mechanical &amp; Electrical – Part II</b>
3:30 PM				
4:00 PM	H Asbury Hall A	D Asbury Hall B Sponsor: TAG Associates, Inc.	C Asbury Hall C Sponsor: Duke Energy	M Asbury Hall D Sponsor: HD Supply
4:30 PM				
5:00 PM				
7:00 PM	<b>Annual Celebration Cocktail Party &amp; Banquet</b> Grand Harbor Ballroom South & Salons 5-8 Sponsor: FPHASIF			
7:30 PM				
10:00 PM	<b>Hospitality Suite</b> Captain's Deck #1116 Sponsor: GSA Screens			
12:00 AM				

Registration Desk Open • Asbury Registration Desk/Rotunda

Exhibits open during meals and breaks

## THURSDAY, AUGUST 13, 2015

8:00 AM – 4:00 PM

### Registration Desk Open

Location: Asbury Registration Desk/Rotunda

8:00 AM – 7:30 PM

### Exhibits open during meals and breaks

8:00 AM – 9:00 AM

### Scholarship Bingo Continental Breakfast

Location: Grand Harbor Ballroom South & Salons 5-8

9:00 AM – 10:00 AM

### H REAC Scoring Methodology

Location: Asbury Hall A

Speaker: Dennis Morgan, D.L. Morgan & Associates

While many suspect that REAC scoring may involve a dart board, there is actually a method to the madness. During this session, participants will be taking a peek inside the manual to gain deeper understanding of the scoring methodology and how your agency can maximize its score.



9:00 AM – 10:00 AM

### D Foundations for Development

Location: Asbury Hall B

Speaker: Jane Dixon, TAG Associates, Inc.

Sponsor: TAG Associates, Inc.

Has your agency considered getting into the development, rehabilitation, or revitalization game, but not known where to start? Then this is the session for you. It will focus on why it can be a good fit for you, the first steps you should take when embarking on these efforts, and most importantly, hurdles to watch out for that could set you back or stop you in your tracks. Funding opportunities, joint ventures, and RFQs will also be covered in this comprehensive overview.



9:00 AM – 10:00 AM

### C HUD Inspector General: Ethics & Key Issues

Location: Asbury Hall C

Speaker: HUD Office of the Inspector General

Sponsor: Duke Energy

The Office of the Inspector General for the U.S. Department of Housing and Urban Development is responsible for the oversight of HUD and its programs, focusing on accountability, integrity, stewardship, and diversity. This session will be an opportunity for attendees to hear about key areas of concern for the OIG and the ethical responsibilities of commissioners in providing oversight for their agencies.



Innovation



HUD Programs



Commissioner



Development



Maintenance

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9:00 AM – 10:00 AM **M** **Electrical Training – Part I**  
*Location:* Asbury Hall D  
*Speaker:* Randy Woolery, *HD Supply*  
*Sponsor:* HD Supply  
 This class is an overview of electricity and how it works. We trace the path of the electricity from the house meter through the entire structure. Topics covered include: safety, National Electrical Code awareness, OSHA awareness, electrical panel service, & common electrical device installation, and troubleshooting.



10:00 AM – 10:30 AM **Networking Break (Exhibit Hall)**  
*Location:* Grand Harbor Ballroom South & Salons 5-8

10:30 AM – 12:00 PM **H** **HUD Streamlining Rule – What Happens Next?**  
*Location:* Asbury Hall A  
*Speaker:* Dennis Morgan, *D.L. Morgan & Associates*  
 Participants in this session will delve into the various implications of HUD's proposed rule on streamlining, the current status of the rule, and what housing authorities can expect on this subject moving forward. This rule can and will have a tremendous impact on your agency, so don't miss out!



10:30 AM – 12:00 PM **D** **Introduction to Mixed Finance for PHAs**  
*Location:* Asbury Hall B  
*Speakers:* Michael Syme, *Cohen & Grigsby*  
 Brian Alten, *BDO PHA Finance*  
*Sponsor:* TAG Associates, Inc.  
 Has your agency either not taken or only recently taken the leap into non-HUD programs to diversify your portfolio and revenue streams? Then, this is the session for you. This class is designed to provide an introduction to mixed finance for the novice and intermediate agencies that want to explore RAD, Tax Credits, and other revenue streams that can keep your agency afloat during these challenging financial times.



10:30 AM – 12:00 PM **C** **Legal Issues for PHA Commissioners**  
*Location:* Asbury Hall C  
*Speaker:* Ric Gilmore, *Saxon Gilmore & Carraway, P.A.*  
*Sponsor:* Duke Energy  
 Public housing agencies are complex quasi-governmental agencies that have legal responsibilities, as well as various legal implications for their operation. Commissioners will be briefed in detail on their legal obligations and responsibilities, as well as current legal issues that have emerged and could potentially affect your agency.



- I** Innovation
- H** HUD Programs
- C** Commissioner
- D** Development
- M** Maintenance

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10:30 AM – 12:00 PM **M** **Electrical Training – Part II**



*Location:* Asbury Hall D  
*Speaker:* Randy Woolery, *HD Supply*  
*Sponsor:* HD Supply

A continuation of our training session on electricity and how it works. We trace the path of the electricity from the house meter through the entire structure. Topics covered include: safety, National Electrical Code awareness, OSHA awareness, electrical panel service, & common electrical device installation, and troubleshooting.

12:00 PM – 1:00 PM **Networking Lunch (Exhibit Hall)**

*Location:* Grand Harbor Ballroom South & Salons 5-8  
*Sponsor:* Duke Energy

1:00 PM – 2:30 PM **H** **We're A Small Agency After All...And Succeeding!**



*Location:* Asbury Hall A  
*Speaker:* Dennis Morgan, *D.L. Morgan & Associates*

It's harder than ever to survive as a small PHA, but agencies all over the country are still doing it. Many wonder how. This session will focus on the unique and innovative ways that small agencies have adapted to succeed in these challenging times and fulfill their missions.

1:00 PM – 2:30 PM **D** **Advanced Development – Ask The Experts!**



*Location:* Asbury Hall B  
*Speaker:* Jane Dixon, *TAG Associates, Inc.*  
*Sponsor:* TAG Associates, Inc.

Whether you are new to the development world, or you have numerous success stories under your belt, you will encounter challenges along your path. The best way to navigate these matters is with the input of the best and brightest who have been there before. So, whether you are dealing with subsidy changes/RAD, HUD rules, FHFC funding applications, partnering/joint venturing – these folks can help. It will be like having a team of consultants for your development goals...a can't miss opportunity.

1:00 PM – 2:30 PM **C** **PHA Financial Oversight**



*Location:* Asbury Hall C  
*Speaker:* Debbie Martin, *Pinellas County Housing Authority*  
*Sponsor:* Duke Energy

One of the most critical responsibilities of a housing authority commissioner is to provide financial and fiduciary oversight for their agency in preserving the public trust. This session is designed to provide attendees with what they need to know and understand to fulfill this role effectively and assumes that participants don't have a background in accounting.

1:00 PM – 2:30 PM **M** **HVAC Training: Mechanical & Electrical – Part I**



*Location:* Asbury Hall D  
*Speaker:* Randy Woolery, *HD Supply*  
*Sponsor:* HD Supply

This course is a good starting place for any HVAC technician. All skill levels are welcome. We discuss the different types of air conditioning systems and how they work. This class also covers preventative maintenance and the troubleshooting skills needed to work on a multi-unit facility.

2:30 PM – 3:00 PM

**Networking Afternoon Break (Exhibit Hall)**

*Location:* Grand Harbor Ballroom South & Salons 5-8

3:00 PM – 5:00 PM **H** **RAD Conversion – Learning from Experience**



*Location:* Asbury Hall A  
*Speaker:* Beth Kinney, *Broward County Housing Authority*

Some agencies have already converted units to RAD, while many others are planning to, and still others are considering it. The Broward County Housing Authority has already converted a number of its units through RAD and are preparing to convert still more. Learn directly from their valuable experience in how it went and what your agency should factor into your considerations.

**I** Innovation

**H** HUD Programs

**C** Commissioner

**D** Development

**M** Maintenance

3:00 PM – 5:00 PM **D** **Service-Enriched Housing – A Model for Success**



**Location:** Asbury Hall B  
**Speakers:** Conchy Bretos, *MIA Senior Living Services*  
Pilar Bretos-Carvajal, *MIA Senior Living Services*  
**Sponsor:** TAG Associates, Inc.

**Model:** Aging-In-Place Model: Housing, Supportive Services, and Funding the Model. The population of low-income older adults is rapidly expanding. They face challenges of finding affordable/safe housing that can accommodate changing needs as they age; often dealing with illness and/or deteriorating physical and cognitive functioning that can impede the ability to live independently. This profile translates into administrative difficulties for housing managers who focused on maintaining properties and housing operations. This panel presents a model that combines onsite healthcare and supportive services and how to fund these services by engaging partners, accomplishing an Aging-In-Place environment for senior/disabled residents and many PHA developments are ideal for converting to this housing model. Join the several Florida PHAs have implemented the model with high degree of success, as well as two more that are in the process.

3:00 PM – 5:00 PM **C** **Strategic & Business Planning for PHA Commissioners**



**Location:** Asbury Hall C  
**Speaker:** Dave Morgan, *D.L. Morgan & Associates*  
**Sponsor:** Duke Energy

Commissioners are an important voice in shaping the goals and direction of the housing agency in their communities. Attendees in this class will focus on the critical need for a strategic business plan for their agency, the necessary steps to move forward in the development of such a plan, and important considerations for its development and implementation.

3:00 PM – 5:00 PM **M** **HVAC Training: Mechanical & Electrical – Part II**



**Location:** Asbury Hall D  
**Speaker:** Randy Woolery, *HD Supply*  
**Sponsor:** HD Supply

A continuation of our training session for any HVAC technician. All skill levels are welcome. We discuss the different types of air conditioning systems and how they work. This class also covers preventative maintenance and the troubleshooting skills needed to work on a multi-unit facility.

7:00 PM – 10:30 PM **Annual Celebration Cocktail Party & Banquet**

**Location:** Grand Harbor Ballroom South & Salons 5-8  
**Sponsor:** FPHASIF

10:00 PM – 12:00 AM **Hospitality Suite**

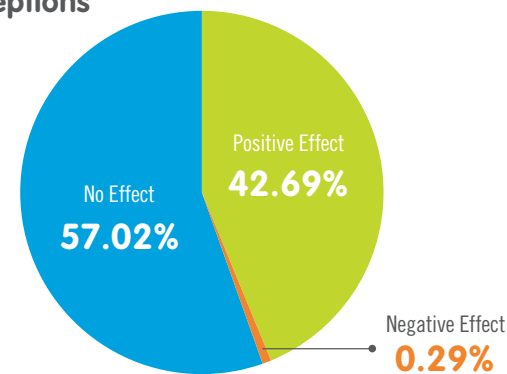
**Location:** Captain's Deck #1116  
**Sponsor:** GSA Screens



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## Speakers

### CONCHY T. BRETOS

*Chief Executive Officer, Mia Senior Living Solutions*

**C**onchy Bretos is a founder of Mia Consulting Group, Inc. DBA Mia Senior Living Solutions. Prior to founding Mia Senior Living Solutions, Ms. Bretos served as Florida Secretary for Aging & Adult Services and AARP State Legislative Representative for Florida, Puerto Rico and the Virgin Islands. Ms. Bretos was the project director for the World Health Organization Regional Teacher Center for Southeast Asia and CEO of The College of Law in Sydney, Australia.

Ms. Bretos has drafted and successfully advocated for several successful bills creating Medicaid funding for services in seven states. In 2003, Ms. Bretos introduced the idea of creating a national demonstration project to the Department of Housing & Urban Development (USHUD) to provide assisted living services to seniors and disabled adults living in public housing.

Ms. Bretos founded two micro-enterprise foundations, served as Chair of Florida Women's Commission and the Hispanic Affairs Commission. She has also served in the Florida Commission on Long Term Care; delegate to the White House Conference on Aging, member of the Governor's Taskforce on Prevention of Elder Abuse; and has been on the board of the Area Agency on Aging, Alzheimer's Association and Florida Center for Housing and Long-term Care Services. She serves on several committees of housing non-profit organizations, including AAHSA.

Ms. Bretos is a graduate of Oberlin College and received a MBA from the University of New South Wales in Sydney, Australia. She attended Harvard John F. Kennedy School of Government. In 2006, she became one of the first winners of the \$100,000 Purpose Prize Award for her innovative work in bringing assisted living services to public housing. In 2009, she became an Ashoka Fellow as recognition of her social entrepreneurship. She is also a winner of the National Hispana Leadership award.



### PILAR B. CARVAJAL

*Chief Operating Officer, Mia Senior Living Solutions*

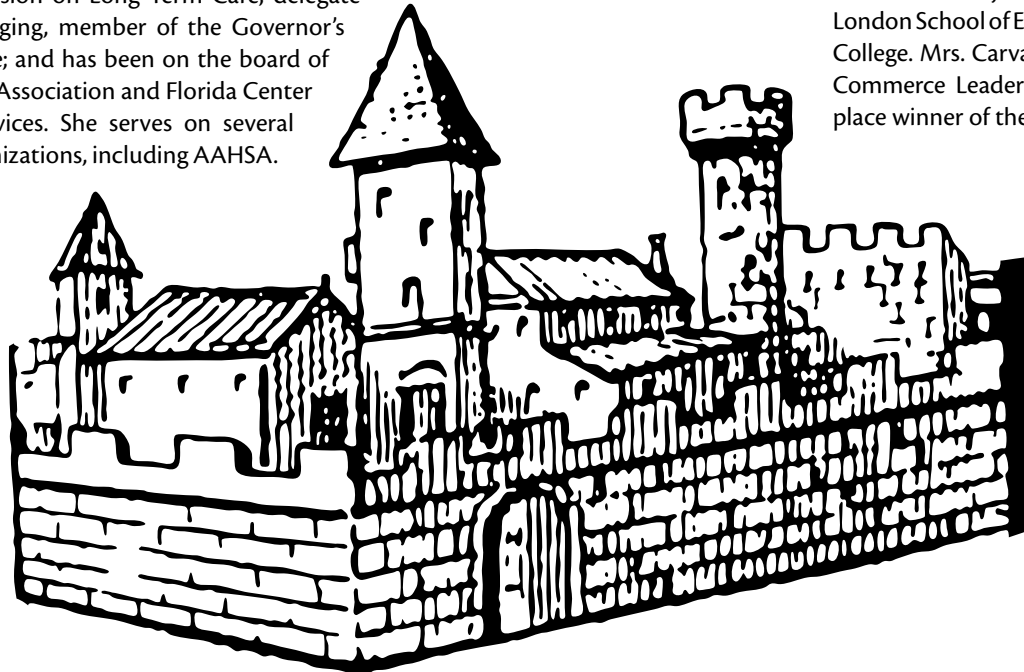
**P**ilar B. Carvajal is the Chief Operating Officer for Mia Senior Living Solutions. Mrs. Carvajal joined Mia Senior Living Solutions in 2001. Mia Senior Living Solutions has worked in 23 states including the District of Columbia.

Mrs. Carvajal is an experienced, certified ALF administrator with considerable experience in operation, financial, performance and project management. As such, Mrs. Carvajal has overseen the strategic development and management of senior living projects for the company. Over her career, she has overseen the management of 1,000 assisted living units.

Prior to joining Mia Senior Living Solutions Mrs. Carvajal worked as a management consultant for the leading management consulting firms of Accenture and IBM Global Business Services in New York City. As such she helped national and international organizations manage change while developing new processes and strategies to create competitive advantages and achieve high performance.

Mrs. Carvajal holds a Master of Science degree from the London School of Economics and a Bachelor of Arts from Smith College. Mrs. Carvajal is a graduate of the Miami Chamber of Commerce Leadership Miami program. She is also the first place winner of the NewMe Miami Pop-Up Accelerator.

Mrs. Carvajal founded the Mia Senior Living Solutions Foundation in 2010. The Foundation is a not-for-profit organization that supports the establishment of pilot senior living demonstration projects working with the federal government. The foundation is also tasked with improving the well-being of senior living residents within the community through educational and wellness programming.



## Speakers

### WILLIAM GRINDL

Senior Associate, TAG Associates, Inc.

**B**ill Grindl has been with TAG since 1995 and prior to that was Senior Planner for the Boston Housing Authority. Prior to the BHA, Bill worked for private property managers and was Director of Facilities for a number of colleges. While at TAG, Bill has worked in various roles on 40+ HOPE VI projects and an equal number of tax credit and/or Mixed Finance projects. Other specialties include maintenance, procurement and housing operations. Bill was part of the HUD Green PNA development team and is presently working with HAI on an approach to housing authority accreditation, including changes to REAC. Bill was also a long term member of the Receivership team for the Housing Authority of Kansas City (MO) and the District of Columbia.



### JANE DIXON

Associate, TAG Associates, Inc.

**J**ane Dixon's professional focus is with Development, Redevelopment and Rehabilitation of Public Housing and Tax Credit properties. Ms. Dixon has worked for over 16 years in affordable housing in both the public and private sector. Her affordable housing experience includes: Low Income Housing Tax Credit (LIHTC) Program Manager for the State of Florida (Florida Housing Finance Corporation); Senior Development Associate for Picerne Affordable Development; Director of Development for the Tallahassee Housing Authority and Associate for TAG Associates, Inc. Ms. Dixon has provided technical assistance to a wide variety of clients, including housing authorities, attorneys, developers, and state agencies. Ms. Dixon's areas of expertise include the Low Income Housing Tax Credit program (LIHTC), its processes and applications, as well as other affordable housing development, HUD mixed finance and federal and state grant management.



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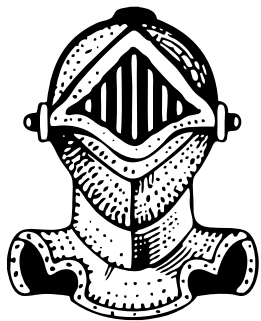
## Speakers

### **RICARDO L. GILMORE**

*Senior Partner, Saxon Gilmore & Carraway, P.A.*

**G**ilmore has practiced law for more than 30 years and specializes in the areas of business and corporate law, real estate, public finance, and commercial litigation. He serves as special counsel to housing authorities in Florida and other states relative to affordable housing development matters, which involve a multiplicity of legal issues unique to housing authorities as well as applicable to governmental agencies and/or corporate entities. He has developed a specialty in public housing law and has been involved in two extensive litigation matters appealed to the U.S. Supreme Court that established nationwide precedents.

Further, Mr. Gilmore has been involved in the establishment and operation of instrumentalities and affiliates associated with development and fundraising for housing authorities. He has considerable experience in Florida Government-in-the-Sunshine laws, public records laws, real estate redevelopment, and corporate governance issues affecting commissioners of housing authorities, as well as public finance relative to issuance of municipal bonds and acquisition of tax credits. He has worked on legal issues for ten (10) Hope VI revitalization projects. He has also worked with one of the few housing authorities in the nation that demolished public housing and served as its own developer to rebuild and operate affordable housing and tax credit units in its place, without the assistance of Hope VI financing. He has helped create public-private partnerships to redevelop blighted areas into mixed income communities with commercial office and retail components, and has advised on the establishment of workforce housing in urban areas.



Mr. Gilmore is particularly proud of serving as legal counsel to a housing authority in Georgia that achieved complete autonomy from the U.S. Department of Housing and Urban Development, while retaining its status as a public housing authority. Mr. Gilmore received his B.A. degree from the University of Georgia in 1975 and his J.D. degree from the University of Florida College of Law in 1978. He is a frequent speaker at conferences concerning public and affordable housing issues, including conferences sponsored by the Housing Development and Law Institute (HDLI), the National Association of Housing and Redevelopment Officials (NAHRO), the National Organization of African-Americans in Housing (NOAAH), the Public Housing Authorities Directors Association (PHADA), and the Florida Association of Housing and Redevelopment Officials (FAHRO).



### **MARTIN HURWITZ**

*Executive Director, Habitude*

**H**urwitz runs a successful national executive coaching business and consulting practice coaching executives, advising businesses and law firms and facilitating board meetings and strategic retreats in the for-profit and not-for-profit space. His clients span advisors at Morgan Stanley, J.P. Morgan, SunTrust, Merrill Lynch to executives at The Boys and Girls Clubs, University of Florida, Sarasota Housing Authority, and high-profile individuals and law firms.

Marty spent 25 years in the entertainment industry working with studio heads and executives of all the cable and television networks and their parent companies. He worked at The William Morris Agency and I.C.M.; was a producing partner with Richard Zanuck and David Brown; and was executive vice president at New World Pictures before founding Martin Hurwitz Associates, a boutique agency representing established writers, directors, actors, authors and producers.

He has helped guide the careers of Mike Meyers, Paul Reiser, Delta Burke, Michael Mann, Ridley Scott, Raquel Welch, Jack Palance, Jules Epstein, Arthur Kopit, Joel Surnow, Joseph Wambaugh, Andrew Vachs, David Chase, Dick Wolf and Anthony Lucas, among others. Marty is also founder and executive director of Hab-i-tude, a not-for-profit whose mission is to help at-risk students succeed through a program of life coaching and academic tutoring. Marty serves on a number of boards and advisory committees in Sarasota.

### **MELINDA ISLEY, APR**

*Founder, MCreativePR*

**I**sley established MCreativePR in 2000 and has more than 20 years of public relations, marketing and design experience. A Fort Myers native, Isley holds a bachelor's degree in journalism from the University of Florida and studied graphic design at Southeast Center for Photo/Graphic Studies in Daytona Beach. She has served on the local and state boards of the Florida Public Relations Association and has achieved professional accreditation. In 2004, the Southwest Florida Chapter of FPRA named her Public Relations Professional of the Year. Her work on behalf of the Barbara B. Mann Performing Arts Hall, American Cancer Society, Community Cooperative Ministries, Inc. and Bennett's Fresh Roast has been recognized with local and state awards by FPRA.





## Speakers

### TRICIA L. GALLAGHER

*Vice President, First Housing*

Tricia is a multi-lingual, solution-oriented professional with over 15 years of experience and proven ability in the areas of law, real estate, banking, insurance, import/export and consumer/commercial liabilities. She previously served as Senior Compliance Officer for a variety of business enterprises overseeing multiple, multi-billion dollar portfolios.

In 2008, Tricia joined the senior management team at First Housing to oversee operations and personnel in Loan Administration, Servicing and Construction Management. Since then, Ms. Gallagher has implemented a complete overhaul of its policies and procedures as well as introduced streamline standard operating procedures which have significantly helped overall operations.

In addition to personnel management and training, she supervises and conducts in-house audits of all incoming pre and post-closing loan packages to ensure all respective state and federal requirements are in place and handled timely and efficiently to ensure borrower, investor, and development collateral are secured and free from all liens and liabilities.



### EFREM LEVY

*Associate, Reno & Cavanaugh, PLLC*

Efrem is the managing member of Reno & Cavanaugh's Washington, DC office. Efrem represents affordable housing developers, housing authorities and lenders across the country in complex redevelopment projects that combines federal low-income housing tax credits, tax exempt bonds, state housing tax credits, FHA funds and other public and private sources of development funds.

Efrem also focuses on the use of project-based housing choice vouchers, particularly in the mixed-finance context, assists housing authorities with audits or investigations by the HUD Office of Inspector General, and represents other non-profit entities related to commercial lease negotiation, tax-exempt issues and other corporate matters. Efrem is a frequent speaker on real estate finance, public housing and Section 8 issues before the American Bar Association Forum on Affordable Housing and Community Development Law, Housing and Development Law Institute, and the National Association of Housing and Redevelopment Officials (NAHRO).

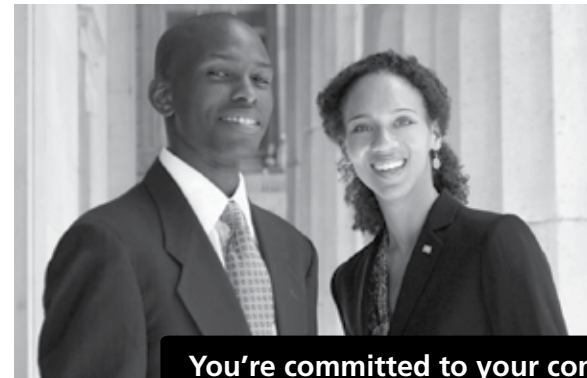


### CHRISTA L. LANDRAM

*Senior Compliance Specialist,  
Training & Education Manager, First Housing*

Landram is responsible for developing all of the affordable housing compliance courses on First Housing University. On behalf of NAHB, she administers the training and exam to become a Housing Credit Professional (HCCP). She also speaks at various conferences and workshops on the rules and regulations of the affordable housing programs. Additionally, she trains on behalf of the state at quarterly workshops.

Mrs. Landram's responsibilities also include monitoring compliance under various affordable housing programs including Housing Credit, Multifamily Revenue Bond and HOME. Her responsibilities include conducting on-site file reviews and physical inspections, as well as assisting in compliance training for owners and on-site staff. Mrs. Landram is a Certified Credit Compliance Professional-C3P, Certified Occupancy Specialist and Housing Credit Certified Professional – HCCP.



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## Speakers

### DENNIS MORGAN

Senior Associate, D.L. Morgan & Associates

Dennis provides technical assistance to PHAs, communities, and states throughout the United States for HUD, NeighborWorks America, LISC, NAHRO, FirstPic, and with the private firms. Mr. Morgan has provides technical assistance and training on various issues throughout the country including; Rental Demonstration Program (RAD), Housing Choice Voucher, Asset Management, REO Properties, NSP, Conversion of Public Housing to the HCV Program, HCV Homeownership, PH Homeownership, Public Housing, Project-Based Management of Public Housing, Operating Subsidy Changes, Strategic Planning, Public Housing Executive Management, Eligibility, Income and Rent for PH and the HCV Program, PHAS, Section 8 Administration, Public Housing Administration, UPCS, HQS, SEMAP, Board Training, and the PHA Plan. He is a faculty member for NAHRO, D L Morgan & Associates, and NeighborWorks America.

Mr. Morgan has authored several guidebooks and articles including sections on the REO training manual, Pioneers Light the Way, An Assessment of the HCV Homeownership Program, Pooling Resources: Local Housing Agencies Forming Consortia, the NeighborWorks America's Creating a Successful HCV Homeownership Program, Managing a Successful HCV Homeownership Program, LISC's HCV Homeownership Training Manual, LISC's HOME Program and HCV Homeownership Training Manual, and the NAHRO's CDBG training materials and the current HCV Homeownership Training materials used by the Department of Housing and Urban Development, NAHRO's Asset Management, Public Housing Eligibility Income and Rent Training Manual, HCV Eligibility Income and Rent Training Manual, Earned Income Disallowance Technical Assistance Manual, HCV Occupancy Manual and Consortia Training Manual, and most recently NAHRO's Strategically Positioning Your Agency for Asset Management.

He has authored many training publications on asset management and currently works with PHAs transitioning to the project-based management and accounting systems. Mr. Morgan also teamed with other associates to co-author the just released Public Housing Admission and Occupancy Guidebook, and the recently released Voucher Homeownership Guidebook. Mr. Morgan has over 43 years of experience in technical assistance or administering high performing Public Housing Authorities (PHAs) in Toledo, Ohio; Orlando, Florida; and Deland, Florida.



### DAVID MORGAN

Associate, D.L. Morgan & Associates

David has 7 years of providing technical assistance and training to housing authorities. His experience includes the creation of NAHRO training manuals, consolidation/consortia plans, ACOP, Admin Plans, NSP project management, disaster planning, strategic planning and executive director selection. He currently the Chairman of the Sarasota Housing Authority and the FAHRO Commissioner at Large.



### FERNANDO RAMOS

Senior Special Agent, Tampa Field Office

Fernando Ramos, a Boston College Law School graduate, began his Federal Law Enforcement Career with HUD OIG in Boston where he worked violent crimes, narcotic cases (as case agent and undercover agent) and white collar fraud cases. Ramos also served as supervisor for the New Orleans HUD OIG Office shortly after Hurricane Katrina where he focused on public corruption and disaster fraud cases. Ramos was Special Agent in Charge of the Criminal Investigations Division in Washington DC where he focused on policy, training, and issues of Congressional Interest and also served six years as a reservist with the US Coast Guard Investigative Service in Boston, MA.

### RANDY WOOLERY

Market Trainer, HD Supply

Randy comes to HD Supply, after 21 years in the multi-housing industry. Having worked as a Maintenance Technician, Maintenance Supervisor, Regional Maintenance Supervisor, and Area Service Manager, Randy brings a wealth of experience in the maintenance field. He has learned that in addition to doing the work, it is important to lead and motivate others.

Along the way, Randy's duties included Maintenance Training and New Hire Training for Human Resources. It is this passion to teach that Randy is happy to bring to each HD Supply Training Session.



## Speakers

### MARC B. ROSENTHAL

Senior Counsel, Cohen & Grigsby

**M**arc is Senior Counsel of the firm and a member of the Affordable Housing, Business Services and Public Finance Groups. He specializes in affordable housing issues. Marc is also a Certified Public Accountant. Marc represents housing authorities in the mixed-finance revitalization of communities and in disputes with HUD OIG. He also represents developers in mixed-finance revitalization. He drafted a First Intercreditor Agreement used in a mixed-finance transaction.

He has experience with transactions related to senior development, including assisted living, and has helped the non-elderly obtain disability benefits. Marc has also helped clients use funding sources such as HOME, CDBG, Low-Income Housing Tax Credits, AHP, Historical Credits, Tax-Exempt Bonds, CFFP and Replacement Housing Factor Funds. He has represented housing authorities across the United States, including the Broward County Housing Authority in Florida; the Housing Authority of Newport, Kentucky; the City of Phoenix, Arizona; and the Wheeling Housing Authority in West Virginia. Marc also serves as a member of NAHRO and the Pittsburgh AIDS Task Force.



### CHRISTOPHER N. THOMAS, CPA

Office Managing Partner,  
Frost Cummings Tidwell Group, LLC Austin office

**W**ith over 20 years of public accounting experience, Chris is responsible for providing domestic tax, financial accounting and tax consulting services to individuals, corporations and partnerships in a multitude of industries. He is also responsible for federal and state compliance with partnership tax allocation requirements; tax planning and tax compliance for partnerships and corporations, with a focus on low-income housing tax credit projects and real estate developers.

Chris has a strong focus and active role in FCTG's tax-incentivized real estate and commercial real estate practice. Clients served include publicly-held Fortune 100 companies, non-profit housing organizations and developers across the United States. Chris leads the firm's cost segregation study practice and also served as a member of the University of Texas McCombs School of Business Advisory Council for the Department of Accounting. Chris attended The University of Central Florida where he received a B.S. in Accounting and a M.S. in Taxation.



### MICHAEL H. SYME

Vice President of Finance & Treasurer, Cohen & Grigsby

**S**yme is a shareholder and director of Cohen & Grigsby, P.C. where he serves as the Vice President of Finance and Treasurer as well as the head of the firm's Affordable Housing Group. He has worked with numerous housing authorities and developers in the revitalization of affordable housing. Mr. Syme has served as the managing attorney on numerous mixed-finance transactions. In this capacity, he has been involved in all aspects of mixed-finance transactions including the use of low-income housing tax credits, historic tax credits and tax-exempt bonds, selection of and negotiation with developers, relocation plans, fair housing and advocacy with HUD on behalf of housing authorities regarding the interpretation and waiver of regulations.

Mr. Syme has a Bachelor of Science degree in business from the Pennsylvania State University (cum laude with Honors) and a Juris Doctor degree from Boston University School of Law. Mr. Syme is the co-chair for Pennsylvania's Section of the ABA Forum on Affordable Housing and has been listed in The Best Lawyers in America and is rated AV the highest rating possible – by Martindale Hubbell.



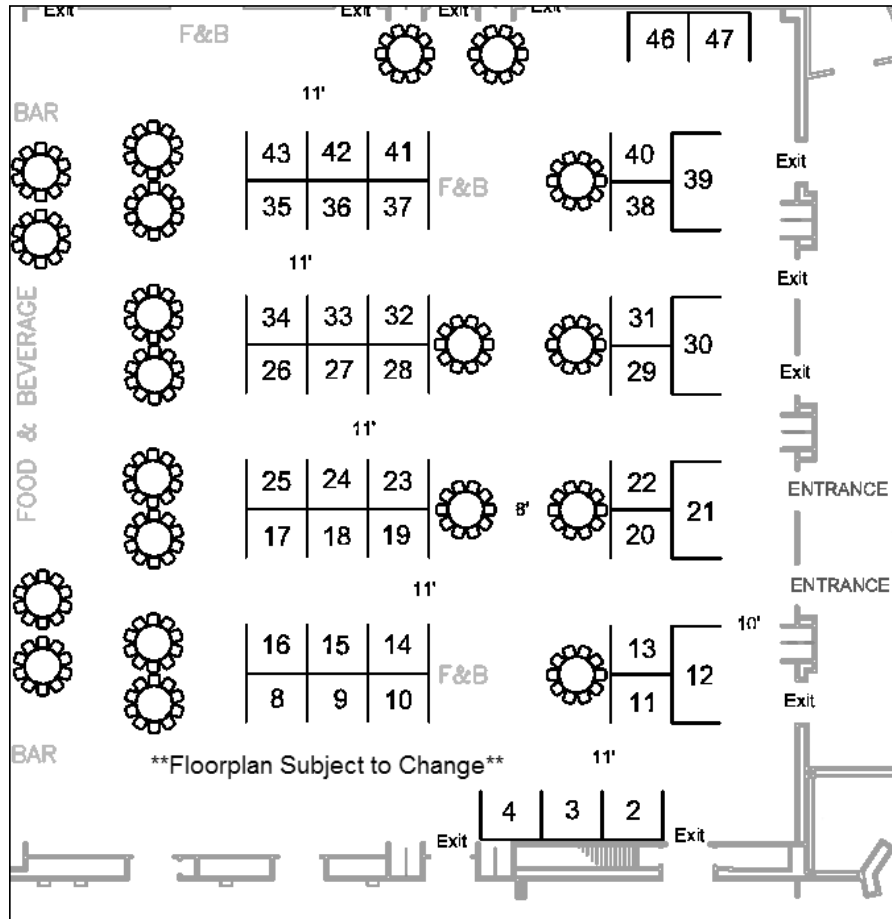
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