



Nan McKay
AND ASSOCIATES, INC.

Blended Occupancy Management

An HCV, Public Housing, and Multifamily Seminar

SEMINAR NUMBER: 101-072

Schedule

Day One: 8:00 A.M. Registration
Day Three: 1:00 P.M. End of seminar
3:00 P.M. End of exam

Materials

- Blended Occupancy Management workbook
- FDS line definitions and crosswalk guide
- NMA bag, pencil, calculator, and pen

Certification Exam

A certification exam is available for \$150 unless otherwise stated on the order form

Delivery Method

A group-live seminar featuring PowerPoint, case studies, group discussion, class materials (workbook, course book or master book), brainstorming, and Q & A

Length

Three days

Audience

Public and private sector managers and directors of combined funding programs and properties. Asset managers, program analysts and compliance officers, and site staff.

Credits

CPE units w/ exam = 22 CEU units w/ exam = 1.9 Intermediate program Level. No advanced preparation required. Prerequisites: Working knowledge of at least two of the programs covered in this class

PURPOSE: Public Housing, Section 8, Low-Income Housing Tax Credit, HOME. It used to be complicated enough to manage these programs individually, let alone combined in one property! Properties with mixed financing and blended occupancy are more common than ever before. Housing professionals must be able to ensure compliance with multiple programs at one site. Eligibility, certifying income, determining rents, and managing the unit mix are critical components for mixed financing properties. The ability to interpret and apply complex, and often conflicting, regulations is critical to ensuring long-term compliance. This three-day, fast-paced training will provide you with practical tools that you need in order to navigate the complex regulatory environment of mixed financing and blended occupancy properties. You can't afford to miss this important workshop! This course focuses on the management of mixed financing and blended occupancy properties. An existing working understanding of some of the programs is preferred. Updated for the streamlining final rule!

LEARNING OUTCOMES: Upon completion of Blended Occupancy Management, you should be able to explain and apply HUD and IRS regulations and guidance to the low-income housing tax credit (LIHTC), Section 8 project-based rental assistance (PBRA), project-based voucher (PBV), public housing, and HOME programs to achieve long-term compliance when managing mixed-finance properties.

- Identify the key program elements, requirements, regulatory agencies, and documents used in blended occupancy projects. Describe the important compliance time periods for LIHTC and HOME projects. Manage eligibility for blended occupancy projects
- Identify the waiting list, tenant selection plan, and occupancy standards requirements for the various programs. Describe the various program requirements when preparing to rent a unit. Recognize how unit rents and household rents are determined in blended occupancy projects. Recognize and distinguish between the interim and annual recertification requirements for the various programs. Manage the unit mix in blended occupancy projects
- Discuss and apply HUD guidance pertaining to appeals and hearings. Describe property inspection protocol for the various programs. List the annual reporting requirements for the LIHTC and HOME programs

For more information about this class, please call us at **800.783.3100**, email **sales@nanmckay.com**, or visit our online store at **nanmckay.com** for current seminar locations and dates.

*All classes are subject to change. Please plan ahead by purchasing refundable airfare.



Nan McKay & Associates, Inc. has been accredited as an Authorized Provider by the International Association for Continuing Education and Training (IACET). In obtaining this accreditation, Nan McKay & Associates has demonstrated that it complies with the ANSI/IACET Standard which is recognized internationally as a standard of good practice. As a result of their Authorized Provider status, Nan McKay & Associates is authorized to offer IACET CEUs for its programs that qualify under the ANSI/IACET Standard.



Nan McKay & Associates, Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted.



Blended Occupancy Management

Seminar Registration Form

For more information about this class including current seminar locations and dates, please call us at **800.783.3100** email sales@nanmckay.com, or visit our online store at nanmckay.com

Seminar Schedule

Day One: 8:00 A.M. Registration
Day Three: 11:30 A.M. End of seminar
3:30 P.M. End of exam

Registration Options

We are able to offer a reduced price for this class because it is being hosted by a local housing authority.

- Seminar Fee #101-072.....**\$650**
- In-class Certification Exam #100-072**\$150**
- Online Certification Exam #11072-EXAM**\$150**

Seminar Dates and Locations

- January 17-19 in Perth Amboy, NJ

NEW LOCATION!

Perth Amboy Housing Authority
Administrative Office
881 Amboy Avenue
Perth Amboy, NJ 08861
Registration contact: Kristi Penta Duffy
Phone: (732) 826-3110 x612
Email: Kduffy@perthamboyha.org

Hotel Recommendations

Hampton Inn Woodbridge
370 U.S. 9
Woodbridge, NJ 07095
Phone: (732) 855-6900
Extended Stay America - Newark - Woodbridge
1 Hoover Way
Woodbridge Township, NJ 07095
Phone: (732) 442-8333

Attendance Information

Print names as you would like the name to appear on the certificate.

- Please check here if you are disabled and require a specific accommodation in order to participate in this seminar. A form will be sent to process your request.

Attendee 1 Full Name: _____

Email Address (Required): _____

Attendee 2 Full Name: _____

Email Address (Required): _____

Attendee 3 Full Name: _____

Email Address (Required): _____

Attendee 4 Full Name: _____

Email Address (Required): _____

Please include a shipping address that is not a P.O. Box. We will ship you a plaque if you purchase and pass the certification exam for this seminar.

Agency: _____

Phone: _____ Fax: _____

Billing Address: _____

City: _____ State: ____ Zip: _____

Shipping Address (No P.O. Boxes): _____

City: _____ State: ____ Zip: _____

Payment Options

To register, fax a completed registration form to (732) 826-3111. Make checks payable to the Perth Amboy Housing Authority and mail the registration form(s) with your check to 881 Amboy Avenue, P.O. Box 390 Perth Amboy, NJ 08862. Payment must be received before registration can be confirmed.

Policies

By registering for and attending this training, you agree that you will not copy, share, post, or otherwise disseminate training or exam materials, including but not limited to posting on the internet, internal network, shared drive, or other publicly accessible means of access. Unauthorized distribution of NMA materials may result in the loss of your certification and/or legal action. **Hotel Recommendations:** Please note that these are only recommendations. We also recommend asking for the government rate when booking rooms at any hotel. **Cancellations:** If you are unable to attend this seminar, you may send a substitute or receive a credit toward a future seminar, to be attended within a one-year period. If you are unable to attend, you must notify NMA in writing at least 60 calendar days prior to the start date of the seminar. If you do not notify NMA in writing, you are responsible for the entire registration fee. If you cancel less than 60 days prior to the start date of this seminar, a cancellation fee of \$150 will be assessed. Substitutions must be in writing on company letterhead with the seminar name, location and attendee name, and received by NMA prior to the seminar start date. NMA reserves the right to cancel a seminar at any time. If a seminar is canceled by NMA, registration fees will be refunded or credited in full. NMA is not responsible for airfare, lodging or other related expenses. Please plan ahead by purchasing refundable airfare. **Retaking Exams:** Exam retake options vary; call for details. You are permitted to fail an exam three times before you are required to retake the seminar. NMA reserves the right to change any policies or pricing at any time and in its sole discretion. For more information regarding refund, complaint and program cancellation policies, please contact our offices at 800.783.3100.