Day 1 – May 18, 2026

Owner / Agent Track

S1: **National Update** – This session delivers the most current federal policy developments, regulatory updates, and industry trends impacting affordable housing providers nationwide. Attendees will receive insights on HUD program changes, upcoming legislative priorities, and key compliance considerations for the year ahead.

S2: **CA Legislative Update** – Join Rae Beam for an in-depth look at California's latest housing legislation. This update covers newly passed bills, regulatory changes, and upcoming proposals that will impact affordable housing providers. Stay informed and prepared for what's coming next.

S3: **CA Program Update with CTCAC & HCD** – **COURSE DESCRIPTION COMING SOON**

Service Coordinator Track

S1: **Mental Health Crisis Planning** – This interactive, instructive and practical training session will address how our behaviors are a demonstration of who we are and how we communicate our response to daily living. Older adults with mental health conditions are a diverse population, most of whom want to continue residing in their communities. Through various education techniques, this comprehensive conference session will provide guidelines for supporting adults with mental health conditions who wish to continue living in independent housing settings.

At the completion of this conference session, participants will be able to:

1. Understand the barriers that older adults face when accessing mental health services
2. Identify strategies for responding to challenging behaviors associated with a mental health crisis
3. Develop a plan of action for responding to older adults experiencing mental health decompensation due to untreated mental health conditions including scenarios
4. Identify local and national mental health resources

S2: **Hoarding & Failed Unit Inspections** – This interactive and practical conference session will provide resident service coordinators (RSCs) with the tools to respond to hoarding behaviors with safety, dignity, and compliance. Role clarity will be addressed regarding what RSCs can and cannot do when hoarding behaviors affect unit inspections, including tips for how to work collaboratively with PMs.

At the completion of this session, participants will be able to:

1. Recognize hoarding behaviors common among older adults in affordable housing
2. Understand why hoarding leads to repeated inspection failures
3. Identify the limits of the RSC role (non-clinical, voluntary services, fair housing)
4. Respond supportively when a resident fails an inspection without escalating harm
5. Partner effectively with property management while maintaining resident trust
6. Use trauma-informed strategies to support residents toward safer living conditions

S3: **Boosting Resident Engagement & Reducing Isolation Conflicts** – Older adults living in affordable senior housing communities often experience social isolation, disengagement, and interpersonal conflict that can affect the individuals well-being, community cohesion, and housing stability. Resident Service Coordinators (RSCs) play a critical role in supporting connection and access to voluntary services while maintaining appropriate boundaries and compliance with HUD and Fair Housing requirements. This interactive session will equip RSCs with practical, trauma-informed strategies to increase resident engagement, recognize and respond to social isolation, and navigate resident-to-resident conflict in ways that are equitable, non-coercive, and role-appropriate. Participants will explore common barriers to participation, the underlying factors contributing to conflict among older adults in sharing housing, and the importance of maintaining voluntary services and equal access for all residents.

By the end of this session, participants will be able to:

1. Identify common barriers to resident engagement in affordable senior housing
2. Recognize early signs of social isolation and disengagement
3. Apply low-cost, inclusive strategies to boost participation and connection
4. Understand why conflict occurs among older adults in shared housing

Supportive Housing Track

S1: **Best Practices in Eviction Prevention & Crisis Response** – This course equips housing professionals with proactive strategies to prevent evictions and effectively respond to resident crises while maintaining compliance and operational integrity. Participants will explore early intervention techniques, effective communication methods, payment plan structuring, and documentation practices that reduce risk and promote housing stability.
The session also addresses crisis response protocols, coordination with supportive services, fair housing considerations, and legal timelines to ensure actions are both compassionate and compliant. Through practical examples and real-world scenarios, attendees will gain tools to de-escalate conflict, support vulnerable residents, and protect the property's interests.

S2: **Case Management Models That Work** - **COURSE DESCRIPTION COMING SOON**

S3: **Balancing Accountability with Compassion** – In affordable housing communities that include Permanent Supportive Housing (PSH), housing professionals are often tasked with navigating the delicate balance between enforcing compliance requirements and supporting residents with complex needs. This session explores practical strategies for upholding lease obligations, regulatory standards, and property policies while maintaining a trauma-informed, person-centered approach. Participants will examine real-world scenarios involving lease enforcement, behavioral challenges, recertification compliance, and service coordination. The session will highlight best practices for collaboration between property management and supportive services staff, effective communication techniques, and documentation standards.

Property Management Track

S1: **Serving Legal Notices** – Are you confident in your ability to prepare and serve a legal notice correctly? Do you understand the justifications for issuing such a notice, and can you differentiate between the various notice periods (3, 10, 30, 60 and 90 days)? If you hesitate to answer any of these questions, this session is designed to provide you with the necessary knowledge.

S2: **Marketing** – A discussion on the essential strategies for effectively reaching, engaging, and informing prospective residents within the affordable housing sector. This topic covers understanding target audiences, communicating qualification criteria clearly, building community trust, leveraging low-cost marketing channels, and ensuring messaging reflects both compliance and compassion. This course is designed to assist industry professionals with new or refreshed ideas in marketing.

S3: **Boosting Resident Engagement & Reducing Conflict Isolation** – Older adults living in affordable senior housing communities often experience social isolation, disengagement, and interpersonal conflict that can affect the individuals well-being, community cohesion, and housing stability. Resident Service Coordinators (RSCs) play a critical role in supporting connection and access to voluntary services while maintaining appropriate boundaries and compliance with HUD and Fair Housing requirements. This interactive session will equip RSCs with practical, trauma-informed strategies to increase resident engagement, recognize and respond to social isolation, and navigate resident-to-resident conflict in ways that are equitable, non-coercive, and role-appropriate. Participants will explore common barriers to participation, the underlying factors contributing to conflict among older adults in sharing housing, and the importance of maintaining voluntary services and equal access for all residents.

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Supervisor Track

S1: **Budgeting & Bottom-Line Thinking** – Effective budgeting skills are essential for the growth and development of property management professionals. This session is designed to help participants better understand budgeting processes and their intended outcomes.

Key topics will include:
- Understanding the budgeting process and legal aspects
- Advanced forecasting techniques and financial terminology
- Budget management and analysis
- Identifying trends that impact the bottom line
- Identifying smart procurement practices

S2: **Critical Thinking & Effective Problem Solving** – Critical thinking provides the skills to analyze and evaluate information effectively, allowing you to maximize the knowledge gained from any situation. Developing these skills increases the likelihood of making sound decisions and helps minimize the impact of potential mistakes.

By becoming a more rational and disciplined thinker, you can reduce personal biases and gain a clearer understanding of your environment. This workshop provides the foundational tools to identify and distinguish between relevant and irrelevant information, ultimately increasing your productivity at work and providing a valuable skill for your everyday life.

Workshop objectives include:

- Understand the core components of critical thinking
- Learn how to utilize non-linear and logical thinking
- Identify the characteristics of a critical thinker
- Evaluate information using specific critical thinking skills
- Recognize the benefits of critical thinking and how to revise perspectives
- Develop various problem-solving abilities

S3: **Self-Leadership: Mastering the Inner You** – Growth often involves learning to lead. Whether leadership comes naturally or is developed over time, effective leadership begins with leading oneself. Taking the time to look inward to assess, motivate and improve your own abilities is essential before you can effectively guide others.

This “Self-Leadership” session is designed to help you discover specific ways to become a better leader for yourself and your team. We will share proven strategies to enhance your leadership style and inspire those around you. As Tom Peters said, “Leaders do not create followers, they create more leaders!”

Session’s Objectives:

- Understand the definition and importance of self-leadership
- Learn techniques for self-motivation
- Develop a positive mindset
- Learn how to set SMART goals
- Implement these strategies to build and strengthen your team

Tax Credit Compliance Track

S1: **Most Common CTCAC Findings** – This session provides an in-depth review of the most common findings issued by the California Tax Credit Allocation Committee (CTCAC) during file and physical inspections. Participants will identify recurring compliance issues related to income certifications, student status, utility allowances, lease execution, file documentation, and unit inspections. The session focuses on practical strategies to strengthen internal controls, improve file accuracy, and prevent findings before an audit occurs.

S2: **Knowing the LIHTC Rules** – This session delivers a comprehensive overview of the Low-Income Housing Tax Credit (LIHTC) program rules and requirements. Participants will gain a clear understanding of eligibility determination, income and asset calculations, student status rules, rent limits, utility allowances, recertifications, and ongoing compliance responsibilities.

Designed to simplify complex regulations, this session translates federal and state requirements into practical, day-to-day application. Attendees will learn how to interpret program guidance, avoid common mistakes, and maintain accurate documentation to ensure long-term compliance.

S3: **Understanding Student Financial Aid Calculations after HOTMA Implementation** – This session provides a clear and practical overview of how student financial aid is treated following the implementation of HOTMA (Housing Opportunity Through Modernization Act). Participants will learn the updated rules for including and excluding financial assistance in income calculations, how to distinguish between Title IV and non-Title IV assistance, and when student aid must be counted toward annual income.

HUD COMPLIANCE TRACK

S1: **HUD Interviewing Techniques** – This session focuses on mastering HUD interviewing techniques and is designed to provide industry best practices to ensure the interviewing process is both efficient and compliant. Whether attendees are looking to refine current skills or implement streamline procedures, this session offers actionable strategies tailored to the requirements of HUD programs.

S2: **MOR Prep Session I** – This course provides a comprehensive breakdown of the HUD Management and Occupancy Review (MOR) Form 9834. We will review each section of the form to explain its requirements and expectations. Additionally, the session will offer practical, achievable strategies to help you maximize your scoring in every category.

S3: **MOR Prep Session II** – This course provides an in-depth breakdown of the second half of HUD Form 9834. We will review each section to clarify its meaning, outline specific expectations, and provide practical, achievable strategies to maximize your scoring.

Maintenance Track

S1: **Conducting Monthly Property Inspections** – This training provides a step-by-step approach to conducting effective monthly property inspections that improve safety, reduce risk, and maintain compliance with housing and regulatory standards. Participants will learn how to identify common deficiencies, document findings accurately, and prioritize corrective actions before issues escalate.

This session will cover best practices for inspecting, units, common areas, building systems, and exterior grounds, with an emphasis on life-safety items and preventative maintenance. Attendees will also gain practical tools for tracking deficiencies, improving follow-up, and creating consistency across inspection processes.

S2: **Timely Unit Turns Best Practices** – This training focuses on proven strategies for completing unit turns effectively while maintaining quality, safety, and compliance standards. Participants will learn how to reduce vacancy days, coordinate maintenance and vendor effectively, and streamline the unit turn process from move-out to move-in.

The session covers best practices for inspections at move-out, scope-of-work planning, work sequencing, material readiness, and quality control. Emphasis will be placed on communication between property management and maintenance teams to prevent delays and rework.

S3: **Fair Housing & Accessibility** – In this class, we will review the definition of disability, the process of handling requests for reasonable accommodations such as assistance animals, parking, hoarding and mental disabilities. We will also review the process for handling requests for reasonable modifications, including who is responsible for the cost, what conditions a landlord can put on a tenant to approve a request, and when a request may be considered unreasonable.

Day 2 – May 19, 2026

Owner / Agent Track

S4: **Insurance Trends** – This course explores modern insurance trends, changing insurance coverage and markets and the current rate environment for Property and Liability. Participants will examine the impact of data analytics on underwriting, the rise of cybersecurity claims, and strategic responses to emerging risks.

S5: **Hiring & Retaining Best Practices** – This course explores effective strategies for attracting, hiring, and retaining top talent in the affordable housing industry. Participants will learn practical techniques for recruiting qualified candidates, creating a positive workplace culture, onboarding successfully, and reducing turnover. Designed for property managers, HR staff, and leadership teams, this session provides actionable tools to build strong, stable teams that support resident satisfaction and property success.

S6: **Leading with Emotional Intelligence** – **COURSE DESCRIPTION COMING SOON**

Service Coordinator Track

S4: **Communicating Professionally** – In the affordable housing industry, all stakeholders must communicate professionally with one another and residents.

Whether you are upper management, regional or area management, administrative staff, site management, maintenance, resident services, or vendors, you must work cooperatively, collaboratively, and productively. To do this professionally, your communications must be clear, complete, concise, respectful, and often formal. How can you, as an individual, as well as your organization, learn to do this effectively? What skills, tools and mindset are needed?

Join us for this session which will provide guidance and practical strategies you will need to communicate in a professional manner.

S5: **Creating Joy at Work** – Apply a creative, person-centered lens to the aging services workforce and support a more empathetic, purpose-driven organizational culture. Drive innovation, encourage resiliency, and promote growth while positively impacting recruitment and retention rates of staff. In this session, we will discuss a practical framework for how we can support team building, problem solving, and staff satisfaction. This approach encourages us all to bring our most dynamic, innovative selves to work. Through interactive exercises participants will gain tools to identify internal motivators that address employee burnout. This session explores the relationship between work environment, wellbeing and job satisfactions.

By the end of the session, you should have:

- Gained tools to identify internal motivators that address employee burnout.
- Explore the relationship between work environment, well-being, and job satisfaction.

- Review examples of evidence-informed approaches to well-being and create a multi-pronged approach to supporting joy at work.

S6**: Witnessing Without Wearing It: Grief, Care and Staff Well-Being** – Housing professionals regularly support resident through death, crisis, and loss, yet few receive tools for managing the emotional weight of this work. This session introduces a particular, easy to implement framework for offering compassionate support without absorbing or carrying residents' grief alone. Using 'The Snail Framework', a model based on the natural rhythms of carrying, retreating, and returning, participants will learn skills to recognize burnout signals, regulate stress in the moment, and create sustainable boundaries that protect both staff well-being and quality of care. Attendees will leave with language, tools, and realistic practices they can use immediately in resident-facing roles.

Supportive Housing Track

S4: **Understanding Supportive Housing: Integrating Services & Housing Stability** – This course provides an overview of supportive housing and how coordinated services promote long-term housing stability for vulnerable populations. Participants will learn the core principles of supportive housing, the role of property management and service providers, and strategies for effective collaboration. The session explores best practices for integrating case management, community resources, and compliance requirements while maintaining a stable, safe housing environment.

S5: **Balancing Property Management & Supportive Services to Enhance Tenant Engagement & Empowerment** – This session explores practical strategies for aligning property management operations with supportive services to create a housing environment that promotes tenant engagement, stability, and self-sufficiency. Participants will examine the distinct yet complementary roles of management and service teams, learn techniques for setting healthy boundaries, and develop collaborative approaches that foster trust and accountability. Through real-world scenarios and best practices, attendees will gain tools to enhance communication, reduce conflict, and empower residents while maintaining compliance, operational integrity, and community standards.

S6: **Tenant Engagement & Empowerment** – This session focuses on practical strategies to increase tenant participation, strengthen communication, and foster a sense of ownership within housing communities. Participants will explore techniques to build trust, encourage resident involvement, and support self-advocacy while maintaining clear expectations and community standards. The session highlights tools for effective outreach, conflict resolution, and collaborative problem-solving that promote housing stability and positive resident outcomes.

Property Management Track

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S5: **Asset Management 101** – This session is a focused training session on strengthening the partnership between affordable housing property management teams and asset managers to ensure properties operate with an owner-centric mindset. This topic explores how both functions align on financial performance, compliance, long-term asset preservation, and decision-making approaches that balance day-to-day operation with long-range investment goals – ultimately ensuring each property is managed not just to function well, but to perform as a sustainable, high-quality asset for its owner and community.

S6: **Maintenance & Vendor Management** – Managing contractors, service providers, and maintenance technicians can be challenging. To maintain efficient operations, it is essential to have a clear understanding of your designated points of contact and the specific circumstances under which each provider should be engaged.

Please join us to learn key takeaways designed to streamline this process and make your management tasks easier.

Supervisor Track

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S6: **How to Detect & Address Potential Workplace Violence** – Workplace violence has unfortunately become an increasingly common reality. This workshop is designed to provide clarity on how to detect and address these critical safety concerns effectively.

During this session, we will cover:

- OSHA Guidelines: Recognizing standards for protecting the workforce
- Definitions and Impacts: Defining workplace harassment, bullying, and violence, and understanding their consequences
- Risk Factors in Multifamily Housing: Identifying behaviors and specific risks within the industry
- Situational Management: Learning how to identify, manage, and avoid violent situations
- Policies and Procedures: Creating risk assessments and developing relevant organizational policies

Tax Credit Compliance Track

S4: **Tax Credit Income Calculations Basics** – This session is an introduction on how household income is determined for LIHTC eligibility, with emphasis on CTCAC requirements. This includes core principles such as third-party income verification, collecting consecutive pay stubs, and applications of CTCAC's 75% pay-stub threshold for newly employed applicants. This session will assist those new to the industry or industry professionals seeking a refresher.

S5: **How to Respond to State Audits** – "Notice of Noncompliance with Internal Revenue Code Section 42! Now what?" This session will cover how to respond to when CTCAC sends your property a notice of noncompliance. This will include templates and guidance on what to send in response and when to respond.

S6: **Tax Credit Asset Calculations Basics** – This session will cover asset basics for the LIHTC program, covering specifically CTCAC requirements and expectations.

HUD Compliance Track

S4: **Don't Leave Money on the Table: Special Claims for Maximum Recovery** – Every dollar counts—are you claiming what you're owed? Special Claims are a powerful tool for Section 8 Owners to recapture lost revenue from vacancies, unpaid rent, and tenant damages after move-out—but only if you know how to use them effectively. In this high-impact session, you'll learn the ins and outs of all three types of Special Claims, which HUD forms you need, and how to complete them correctly the first time. We'll walk you through the essential supporting documents that can make or break your submission—and give you smart strategies for timing your claims to get the most approved. Don't let another opportunity slip by. Join us and learn how to take full advantage of Special Claims and bring those lost funds back where they belong—into your budget!

S5: **From Confusion to Clarity: Navigating HUD Secure System** – Let's face it — HUD's Secure Systems can be incredibly difficult to navigate. The system is filled with confusing abbreviations, rigid processes, and a specific sequence of steps that can leave even experienced users frustrated and unsure of what to do next. This webinar is designed to remove the guesswork. Whether you're trying to access APPS, iMAX, EIV, or TRACS, we'll guide you through the full process — from business partner registration to assigning users to the correct contracts — so you can complete critical compliance tasks and avoid disruptions to your daily operations. You'll receive a comprehensive handout with step-by-step instructions and screenshots to help you follow along during the session and reference later. If HUD's systems have ever left you confused or stuck, this is the training you need — clear, direct, and designed to help you take control.

S6**: Where HUD Meets LIHTC: Navigating Layered Compliance** – Ready to tackle the challenge of managing a property funded by both HUD and LIHTC? Join us for this dynamic, must-attend session where we break down the best practices for successfully layering Project-Based Rental Assistance (PBRA)with the Low-Income Housing Tax Credit (LIHTC)program. Perfect for property and compliance staff who are experienced with HUD programs and stepping into the world of LIHTC, this session covers everything you need to start strong and stay incompliance. We'll highlight common missteps and how to avoid them—so you're not just keeping up, but staying ahead. Dive into key topics like household eligibility, income limits, student rules, certification requirements, and rent-setting strategies—all tailored to the unique challenges of operating a layered PBRA/LIHTC property. Through real-world examples and practical insights, you'll gain the foundational knowledge and confidence to manage dual-compliance properties with ease. Don't let layered funding trip you up—learn how to navigate both worlds seamlessly and efficiently!

Maintenance Track

S4: **Safety in the Workplace** – All employees, regardless of experience level, must remain informed about company requirements and safety standards. OSHA mandates safety training for all workers to ensure a secure work environment.

Please join us to review key elements, including:

- Understanding company standards
- OSHA 29 CRF 1910 requirements and their application to our industry
- Legal responsibilities for maintaining a safe workspace
- Common hazards that lead to incidents, accidents, and insurance claims
- Employer and employee responsibilities

S5: **Personal Protective Equipment** – Personal Protective Equipment (PPE) is required by federal regulations to ensure worker safety. This course is designed to help participants gain a better understanding of PPE requirements and implementation.

Attendees will learn key elements of an effective PPE program, including:

- OSHA 29 CFR 1910.132 requirements for general industry
- How to perform site hazard assessments and job analyses
- The hierarchy of controls
- Types of PPE used in general industry
- The importance of reporting near misses
- Employer and employee responsibilities

S6: **Budgeting & Inventory Control** – Great maintenance starts with strong planning. This practical, technician-focused session will break down budgeting and inventory control in a way that is easy to understand and immediately applicable in the field. Participants will learn how their daily work impacts the property's bottom line and how smart inventory practices can make their jobs easier, faster, and more efficient.