

# LeadingAge® New York Housing Professionals Annual Conference

March 16, 17, 18, 23, 24, 2021

Virtual

LeadingAge®  
Ohio

## Who Should Attend?

All affordable senior housing professionals including Property and Facility Managers, Housing Management Leaders and Service Coordinators.

## Why Attend?

Hear talks about the industry as impacted by the COVID-19 pandemic by nationally-renowned speakers and property management experts. Come up to speed on best practices and the latest changes in regulatory and compliance requirements. Gain information and ideas you can immediately put into practice!

## NEW THIS YEAR!

Network with, learn from, and share with your peers in facilitated round table discussions specific to your job role!

Registration  
Now  
Open!

### Virtual Conference 5 Day Webinar Series

**\$299** - Includes access to all virtual sessions and online materials for the 5 day conference

### Deep Dive for Facility Managers 1 Day Webinar

**\$69** - Includes access to virtual sessions and online materials for this day only

## **GUIDELINES TO GIVE YOU THE BEST VIRTUAL EXPERIENCE**

### **What you need to participate:**

A computer with internet access, speakers and microphone. We recommend using Google Chrome for your internet browser. The webinar will be hosted via Zoom. If you would like to familiarize yourself with the logistics of attending a Zoom webinar, please visit the **Zoom Help Center**.

### **Attending the Webinar(s):**

Each program date has unique connection information which will be sent one day prior to each conference day for which you are registered. It will also be included in the reminder email you will receive one hour before the conference. If the session includes a handout, it will also be emailed to you in the days prior to each program for which you are registered. Emails will be sent to the address used for registration and cannot be shared as they are unique to each registrant. Additional details will be provided in your confirmation email.

## **CERTIFICATES OF ATTENDANCE**

Certificates of attendance will be provided via email following the conference.

**Service Coordinators:** Earn the continuing education credits recommended by your professional organization, the American Association of Service Coordinators (AASC).

# REGISTRATION



# NOW OPEN!

For more information or to register, go to <https://www.leadingagency.org/leading-u/conferences2021/housing-professionals-virtual-conference/>. Cancellations will not be accepted; refunds will not be issued for this virtual event.

## **PAYMENT**

**We accept the following forms of payment:** Visa, MasterCard, American Express and Discover. Check payments can be accommodated when necessary; however, registrations will not be complete until payment is received. Full payment must be received by the start of the conference to ensure your entry and access to conference materials. This conference is approved as a Housing and Urban Development (HUD) and Division of Housing and Community Renewal (DHCR) allowable expense.

## **ABOUT**

### **LeadingAge New York Mission Statement:**

To create the future of aging and continuing care services in New York State.

### **Sponsored by:**

The Foundation for Long Term Care (FLTC), educational affiliate of LeadingAge New York.

### **Our national partner, LeadingAge:**

Is an association of 6,000 not-for-profit organizations dedicated to expanding the possibilities for aging. Together, we advance policies, promote practices and conduct research that supports, enables and empowers people to live fully as they age.

## FULL CONFERENCE SCHEDULE

### TUESDAY, MARCH 16

9 – 10 am      Passion and Purpose Rediscovered \_\_\_\_\_ Jonathan Fanning  
Author, President, Jonathan Fanning Consulting, New York

A year from now, you'll be living with a deeper sense of passion and purpose... or not! You've experienced moments of clarity, moments filled with passion, moments with tremendous energy and conviction. You've also experienced the opposite. In this unique [virtual] keynote, you will rediscover four practical secrets that change everything. Reimagine and magnify your ability to be an agent of change. Reawaken "who we are, what we do, and why we do it" for 2021 and beyond.

10:30 – Noon      Re-Breaking the Ice – How to Successfully Re-engage  
Your Resident Population After Quarantine \_\_\_\_\_ Colleen Koziara  
CMDCP, ADC, CCYT, CDP, CADDCT, CEO, Beyond Bingo, Itasca, IL

How can we expand and extend our programming to provide for individual goals and to fulfill the need for follow-through to lengthen engagement time? Find out how to obtain materials and create packaged kits that affordably utilize the full spectrum of in person and online resources to provide group and individual instruction and support for extended engagement experiences. Learn to use a simple childhood game to reconnect residents and staff to alleviate fear and to help them welcome the idea of interacting socially with each other again.

1 – 2:15 pm      HOTMA's Impact on Senior Housing \_\_\_\_\_ Jenny DeSilva  
Director, Blueprint Housing Solutions, Inc., Austin, TX

HUD has published a proposed rule implementing provisions of the Housing Opportunity Through Modernization Act (HOTMA), which was signed into law in 2016. While not yet implemented, the proposed rule contains significant changes to the requirements applicable to determining tenant eligibility and rent for HUD multifamily housing programs. During this session, participants will learn about new asset limitations, new thresholds for calculating imputed asset income, and new thresholds for triggering interim recertifications. Educate yourself now so you are prepared with a solid understanding of how these new rules will impact your applicant and tenant recertification procedures in the future.

2:30 – 3:45 pm      What's in Store with TRACS 203A and When Will We See It? \_\_\_\_\_ Jenny DeSilva  
Director, Blueprint Housing Solutions, Inc., Austin, TX

HUD plans to release TRACS version 2.0.3.A soon. Do you know how this update will affect site-level or centralized compliance staff using TRACS software? During this session, we will outline the most significant enhancements that will have a direct impact on your leasing operations, including expanded reporting categories, new procedures for social security number reporting for some household members, new subsidy suspension codes available for temporary tenant relocations, new coding to facilitate RAD-specific TRACS transactions, and new expanded reporting requirements for ongoing tenant subsidy repayment agreements.

### WEDNESDAY, MARCH 17

8:45 – 9:30 am      U.S. Housing and Urban Development Policy Update \_\_\_\_\_ Dean J. Santa  
Asset Management Division Director, Multifamily Asset Management – Federal Region 2,  
U.S. Department of Housing and Urban Development, New York

Hear a Federal Region 2 HUD official provide a briefing on policy and procedural updates and changes including those policies that HUD has implemented in light of the COVID-19 pandemic.



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## FULL CONFERENCE SCHEDULE CONTINUED

### WEDNESDAY, MARCH 17 - CONTINUED...

9:45 – 10:45 am      **Dementia and Loneliness: Our Role in Making a Difference** \_\_\_\_\_ Dr. Kathleen Weissberg  
OTD, OTR/L, Education Director, Select Rehabilitation, Milford, DE

During normal times, individuals with Alzheimer's disease and related dementias are among the most vulnerable persons in society, dependent on family or professional caregivers for their day-to-day survival. The current pandemic further exacerbates their vulnerability due to both the morbidity and mortality from COVID-19 and the indirect effects of the pandemic on their critical social supports and connections. Persons with dementia are disproportionately affected by social distancing, isolation and lock down.

How can we help? Caregivers and staff play a pivotal role in minimizing these effects. Isolation does not need to equal decline! This session will review practical and cost-effective strategies care providers can implement to impact these areas. Following the frameworks of person-centered care and the Montessori Approach to care, you will hear about meaningful and purposeful activity, sensory, technology, and wellness strategies you can implement to mitigate the potentially harmful effects of isolation.

11 – Noon              **Bullying: Not Just a Playground Problem** \_\_\_\_\_ Dr. Kathleen Weissberg  
OTD, OTR/L, Education Director, Select Rehabilitation, Milford, DE

While the communal nature of senior living communities can open the door to socialization and friendship, it can also provide the opportunity for cliques, gossip, abuse, and bullying behavior. It is estimated that between 10 and 20 percent of older adults living in senior living communities are mistreated by their peers.

In this session, we will review the definition of bullying and its incidence in this population. Characteristics of older adult bullies, as well as their targets and gender differences will be explored. The reasons why bullying occurs and the five different types of bullies will be defined. You will learn the warning signs, the physical and emotional impact of bullying, and what to do if it happens to one of your residents. Interventions for the organization, the bully, and the target will be shared to help communities minimize (and, where possible, prevent) bullying and mitigate the effects on the target.

1 – 2:15 pm              **Depression and Anxiety Among Older Adults** \_\_\_\_\_ Patrick Arbore  
Director and Founder, Elderly Suicide Prevention & Grief Related Services,  
Institute on Aging, San Francisco, CA

Social isolation, either real or perceived, and loneliness are significant risk factors for cognitive decline, anxiety, and depression. Since the beginning of 2020, older adults have been undergoing physical and social isolation because of COVID-19. This may increase the incidence and severity of anxiety and depression among this population.

In this workshop, we will explore how depression and anxiety can surface due to the pandemic, sheltering in place, aging, and physical health concerns. We will also describe ways in which we can identify and respond to the needs of anxious, depressed older people.

2:30 – 3:30 pm              **Difficult Conversations to Have with Older Adults:**  
**Aging, Grief, Illness, and Transitions** \_\_\_\_\_ Patrick Arbore  
Director and Founder, Elderly Suicide Prevention & Grief Related Services,  
Institute on Aging, San Francisco, CA

Conversations about illness, death, bereavement, or loneliness are hard -- for you and the person with whom you are engaging -- so we avoid them as long as possible. How do we make a connection with another person in a way that invites a conversation rather than a confrontation? Learn how to improve communications with older individuals by increasing your experience of empathic and compassionate communication; recognizing the importance of listening behavior; identifying and overcoming barriers to effective communication; understanding the importance of countertransference; and appreciating the importance of self-care.



## THURSDAY, MARCH 18

9:30 – 10:30 am    An Open Forum for Senior Housing Providers \_\_\_\_\_ Linda Couch  
Vice President of Housing Policy, LeadingAge, Washington, DC  
AND  
Juliana Bilowich, Director, Housing Operations and Policy,  
LeadingAge, Washington, DC

This interactive session will be led by experts from LeadingAge national, who will explore various senior housing topics of concern to affordable senior housing providers. We will have an open conversation on state and national policy issues that relate to affordable housing for older adults with low incomes.

11 – Noon    Engagement Technology - Now More Than Ever \_\_\_\_\_ Jack York  
President and Co-Founder, It's Never Too Late, Greenwood Village, CO

The COVID-19 crisis has brought to the forefront of senior living the importance of staying connected and the consequences of isolation. This session will show you how technology can help keep residents and families connected during the crisis and beyond. You will see a myriad of technology solutions and online resources (many of them free), all tools that will help you use technology to keep the connections alive and blossoming for your residents. This is not a one-time issue that will go away once we return to "normal;" it is an issue that is with us to stay, and innovative providers will ensure that they are addressing it head-on.

1:30 – 2:45 pm    Understanding your FAST Act Streamlining Options \_\_\_\_\_ Jenny DeSilva  
Director, Blueprint Housing Solutions, Inc., Austin, TX

Optional streamlined income verification techniques are now available to owners for use with households with fixed income sources. Learn what these new procedures entail and when you are permitted to use them in order to make an informed decision on implementation at your property.

3 – 4:30 pm    Tips and Techniques for Supporting Residents with  
Mental Health Challenges in Senior Housing \_\_\_\_\_ Gaye Freed  
MSW, LICSW Director of Training, 2 Life's Training Institute, Brighton, MA  
AND  
Mary Curlew, LICSW, Community Education and Training Specialist,  
Jewish Family & Children's Service, Brighton, MA

Our presenters will discuss the most common mental illnesses in senior housing as they share their experience and recommendations. What is the language to help manage complex behaviors and difficult situations that are related to mental health issues? Using the guidebook, "Tips and Techniques for Supporting Residents with Mental Illness: A Guide for Staff in Housing for Older Adults" by Gaye Freed, our presenters will provide you practical tips to help better prepare you and your team for working closely with residents suffering from mental illness.

## TUESDAY, MARCH 23

*Facility managers who wish to attend this program as a single day event should select the March 23 Only option on the registration form.*

8:30 – 9:45 am    REAC Inspection Updates in 2021 and Beyond \_\_\_\_\_ Scott Precourt  
President/CEO, U.S. Housing Consultants, Chichester, NH

As a new team settles in at HUD, affordable housing operators wait to see if the continued shift from REAC toward the new NSPIRE protocols continue apace, and in the meantime, what becomes of REAC during post-pandemic? Get up-to-the minute briefing on these and related HUD physical compliance issues.

## FULL CONFERENCE SCHEDULE CONTINUED

### TUESDAY, MARCH 23 - CONTINUED...

*Facility managers who wish to attend this program as a single day event should select the March 23 Only option on the registration form.*

**10 – 11 am**      **Understanding Dementia-Related Behaviors** \_\_\_\_\_ **Kristen Campbell**  
 LMSW, Director of Programs and Services, Alzheimer's Association,  
 Central New York Chapter, Syracuse

Behavior is a powerful form of communication and one of the primary ways for people living with dementia to communicate their feelings and needs. In this session, attendees will learn how to decode behavioral messages, identify common behavior triggers, and learn strategies to better respond to some of the most common dementia-related behaviors including agitation, confusion, aggression, repetition, and wandering.

**11:30 – 12:30 pm**      **Coronavirus Challenges with Everyday Certification Processing** \_\_\_\_\_ **Jenny DeSilva**  
 Director, Blueprint Housing Solutions, Inc., Austin, TX

Staying on top of recertification responsibilities can be a chore for affordable housing professionals on a "regular" day. The COVID-19 pandemic has presented an additional layer of challenges for leasing staff tasked with operating a HUD subsidized property and adhering to existing regulatory requirements, all while keeping staff and residents safe. During this session, we will share ongoing guidance from HUD and best practices from others in the industry to assist you in getting the job done while following necessary safety protocols to keep everyone as healthy and safe as possible.

**12:45 – 1:15 pm**      **An Open Forum for Facility Managers** \_\_\_\_\_ **Kristen Myers**  
 CAE, Vice President of Member Services and Business Development,  
 LeadingAge New York, Latham  
 AND  
 Denis Miciletto, Value First Sales Liaison CT, MA, NY & NJ, Latham

This interactive session will be led by experts from LeadingAge New York and Value First, who will facilitate an open conversation on topics of interest to facility managers. Come ready to share your ideas and best practices with your colleagues!

**1:30 – 2:30 pm**      **Pathogen Control – Mission Accomplished!** \_\_\_\_\_ **Brian M. Morabito**  
 T-CHEST, CIC, T-CNACC, Director of Healthcare Solutions,  
 Hillyard, Inc., Charlotte, NC  
 AND  
 Doug Jones, Vice President US Channel Sales, Novaerus, Madison, CT

This not to be missed presentation will focus on protocols following CDC Guidelines for best practices in surface disinfection to break the chain of infection and air purification strategies to further mitigate risk. Focus will be on environmental hygiene, CDC high touch points, disinfectant strategies and applications, and air purification techniques.

### WEDNESDAY, MARCH 24

**9 – 10 am**      **An Open Forum for Service Coordinators** \_\_\_\_\_ **Sara Neitzel**  
 Senior Policy Analyst for Housing, LeadingAge New York, Latham

This interactive session will be led by LeadingAge New York's Senior Policy Analyst, who will facilitate an open conversation on topics of interest to service coordinators. Bring your questions, concerns, ideas, and solutions!

## FULL CONFERENCE SCHEDULE CONTINUED

### WEDNESDAY, MARCH 24 - CONTINUED...

**10 – 11 am**      **The Evolution of Service Coordination** \_\_\_\_\_ **Melissa Harris**  
 Director of Government Affairs,  
 American Association of Service Coordinators, Powell, OH

Service coordination has evolved greatly in the last three decades. What began as information and referral is now rooted in a proactive and holistic approach to resident support and wellness. This presentation will provide an overview of the profession and program expectations as well as highlight the impacts service coordinators have on their properties. HUD's Service Coordinator in Multifamily Housing Resource Guide will also be explained.

**11:30 – 12:15 pm**      **Aging in Place** \_\_\_\_\_ **Kathelene Williams, Esq.**  
 Partner, Williams & Edelstein, P.C.; President,  
 The Fair Housing Institute, Inc., Peachtree Corners, GA

This session will review the various fair housing concerns that may arise as the physical and mental health of residents decline. It is important for you as senior housing providers to understand how to avoid causing fair housing violations while encouraging aging residents to either accept third party services for the care they need to safely remain in place or move to a residence offering in-house services. While it is often helpful to obtain professional evaluations from third parties to understand the extent of a resident's medical issues, fair housing constraints often prevent you from making or requiring such evaluations. This session will explain how the Fair Housing Act can be violated during these situations and the best practices to avoid those problems.

**2 – 3:15 pm**      **Fair Housing Update** \_\_\_\_\_ **Kathelene Williams Esq.**  
 Partner, Williams & Edelstein, P.C.; President,  
 The Fair Housing Institute, Inc., Peachtree Corners, GA

During this session we will review the latest fair housing topics, including any changes made by HUD's new administration. Recent cases concerning assistance animals and other types of reasonable accommodations common to senior housing providers will be discussed. Ample time will be devoted to addressing questions and discussing any additional fair housing topics of interest to you.

**3:30 – 4:45 pm**      **Maximizing Section 8 and PRAC Rental Subsidy Income** \_\_\_\_\_ **Gates Dunaway**  
 Principal, The Gates Dunaway Group, LLC,  
 Avondale Estates, GA

The goals of this workshop are to educate you on the critical changes to the Section 8 Renewal Guide, illustrate how your Section 8 contract can be protected, and explain how rents can be increased in new ways. We will discuss how the Section 8 contract can be used to promote preservation of your HUD-funded affordable housing property. The first section will focus on traditional Section 8 rental subsidy. We will walk through the Mark-up-to-Market process, explaining how this relatively simple way of marking rents up is now available to LeadingAge members. This section will also include a discussion on how Option 4 "exception rents" can be protected into the future. The second half of the session will explain the new RAD for PRAC program and review the benefits of owners leaving the Capital Advance/PRAC program and obtaining a new 20-year Section 8 contract.



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## SPEAKERS



**Jenny DeSilva,  
Director,  
Blueprint  
Housing  
Solutions, Inc.,  
Austin, TX**

Ms. DeSilva is a recognized compliance expert/speaker with extensive live and webinar training experience. While her original roots stem from Performance Based Contract Administration (PBCA) oversight of Management and Occupancy Reviews and Voucher Processing, she now provides consulting and customized compliance products for housing entities opting to outsource policy and procedure development. Ms. DeSilva is an active member of multiple HUD working groups tasked to develop consistent regulatory oversight practices nationwide and is a HUD subcontractor providing nationwide assistance to HUD's new Section 811 Project Rental Assistance (PRA) and Rental Assistance Demonstration (RAD) conversion programs.



**Gates Dunaway,  
Principal, The  
Gates Dunaway  
Group, LLC,  
Avondale  
Estates, GA**

Gates Dunaway is an advisor and consultant to owners of affordable rental housing, helping them determine and execute preservation strategies. Her primary focus is on properties originally funded with HUD 202 Loans and PRACS, HUD insured 236 funding, Flex Sub Loans, Year 15 deals, and properties with Section 8 contracts. She is approved as a "Subject Matter Expert" and trainer for the HUD Basic and Advance Training courses for preservation of affordable housing. Ms. Dunaway's specialties include the management and oversight of the real estate development of affordable multi-family products, with a wide variety of experience in various refinancing strategies.



**Jonathan  
Fanning, author,  
president,  
Jonathan  
Fanning  
Consulting, New  
York City**

Jonathan Fanning is the author of *Who are you BECOMING?* and has been coaching leaders – from Fortune 500 executives to sole proprietors – for over 15 years. Mr. Fanning was voted the best speaker at a

recent TED conference. A traumatic car accident and several other "Frying Pan" moments in the middle of Mr. Fanning's career as a management consultant to Fortune 500 companies triggered a quest for a deeper sense of purpose, meaning, and significance. "Who are you BECOMING?" and "Who are you helping others to BECOME?" became central to Mr. Fanning's life, businesses, and speaking. He has also built several successful businesses, including a national children's fitness franchise and Entrepreneur Adventure, which helps young people experience business start-up and ownership. He has inspired and challenged audiences with his message in 49 states and on 3 continents.



**Scott Precourt,  
President/CEO,  
U.S. Housing  
Consultants,  
Chichester, NH**

Scott Precourt has worked in affordable housing since 1996. He started as a manager of public housing, tax credit and a variety of multifamily HUD programs and later became a director monitoring a portfolio of 600+ units of multi-funded housing with a large staff. Mr. Precourt left management in 2003 to join software firm Bostonpost as a staff consultant and trainer. He founded U.S. Housing Consultants in 2005. He was certified as a UPCS Inspector in 1999 and has performed over 5,000 UPCS Inspections throughout the country. Mr. Precourt holds certifications as a Tax Credit Specialist, Certified Occupancy Specialist, Public Housing Manager and Rural Housing Manager. He has performed 10,000+ file audits and 400+ Physical Needs Assessments and trained over 10,000 people on UPCS Inspections and related topics.



**Kathelene  
Williams, Esq.,  
Partner, Williams  
& Edelstein, P.C.;  
President, The  
Fair Housing  
Institute, Inc.,  
Peachtree  
Corners, GA**

Kathelene (Kathi) Williams is a partner in the Law Firm of Williams & Edelstein, P.C., providing defense and preventative representation for the housing industry in all civil rights matters. She is also a co-founder and partner in The Fair Housing Institute, Inc., a full-service training, and consulting firm whose mission is to

educate and advise the housing industry about the social and economic benefits of providing fair housing and equal employment. Ms. Williams provides her clients with unique expertise in the fair housing requirements of senior and federally assisted housing and has contributed to numerous housing industry publications. In her previous positions, she served as a fair housing and employment attorney and as director of the Fair Housing and Equal Opportunity Program for HUD's Southeast Region. Throughout her career, Ms. Williams has participated in the investigation, resolution, and litigation of thousands of fair housing cases. In addition to her responsibilities as legal counsel, she has provided fair housing and equal employment training to private housing providers, associations, and government entities throughout the country for the past 30 years.



**Jack York,  
President and  
Co-Founder,  
It's Never Too  
Late,  
Greenwood  
Village, CO**

Jack York is co-founder of It's Never 2 Late (iN2L), a company dedicated to helping older adults realize the full benefits of adaptive technology. Originally, Jack did not envision iN2L as a business; the impetus for what became the company was a philanthropic idea—to donate computers to assisted living communities and nursing homes in Southern California. With a 15 year background in the Silicon Valley, he saw a vast potential in fostering these connections, but also saw that conventional technology was too difficult for virtually all residents to use in a meaningful way. As a result, in 1999, Jack retired as vice president of strategic sales for Vishay Intertechnology and started what has become a successful gerontechnology company. As of 2015, the company has a customer base of over 2000 communities spread out across all 50 states. He is a sought after national and international speaker on technology to create personalized experiences that engage and connect residents to their loved ones and the world at large, specifically individuals with dementia. iN2L's work has been recognized by the Wall Street Journal, NPR, and dozens of senior living publications.