

THE HFA INSTITUTE

JANUARY 12 – 17, 2020 | JW MARRIOTT | WASHINGTON, DC

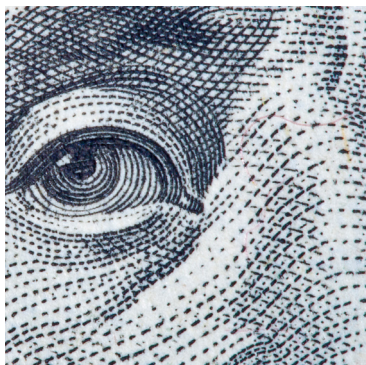
**HOME and
Housing Trust
Fund**
JANUARY 12 – 14



Housing Credit
JANUARY 14 – 16



**MRBs and
Other Federal
Homeownership
Programs**
JANUARY 15 – 17



**Section 8 and
Other Federally
Assisted
Multifamily
Housing**
JANUARY 15 – 17



National Council of
State Housing Agencies

NCSHA's HFA Institute offers intensive training with federal officials and industry experts in these major federal housing program areas: the HOME Investment Partnerships program and Housing Trust Fund; the Low Income Housing Tax Credit; Mortgage Revenue Bonds and other federal homeownership programs; and Section 8 and other federally assisted multifamily housing programs. The Institute's four program-specific conferences cover program essentials and advanced techniques; the latest legislative, policy, and regulatory developments; and emerging program practices.

Take advantage of this unparalleled training opportunity:
Register today for one or more modules at www.ncsha.org/HFAi.

HOME and Housing Trust Fund

JANUARY 12 – 14

Hear from HUD officials and expert trainers during interactive sessions

Learn the status and outlook for FY 2020 funding

Gain guidance and strategies for administering HOME and the Housing Trust Fund

Explore best practices for written agreements, cross-cutting requirements, and risk-based monitoring

Housing Credit

JANUARY 14 – 16

Hear the 2020 legislative forecast

Receive regulatory briefings from Treasury and HUD officials

Participate in a multifamily developers' forum

Discuss income averaging best practices, strategic preservation opportunities, and fair housing and other compliance hot topics

MRBs and Other Federal Homeownership Programs

JANUARY 15 – 17

Talk with leaders from FHFA, FHA, USDA, and Ginnie Mae

Learn the latest on FHA's down payment assistance policies and FHFA's plans for the GSEs' future

Explore partnership opportunities with Fannie Mae, Freddie Mac, and the FHLBs

Gain expert tips on HFA homeownership financing and cybersecurity requirements

Section 8 and Other Federally Assisted Multifamily Housing

JANUARY 15 – 17

Discuss multifamily priorities and policy updates with HUD and USDA officials

Train on Section 8 Performance-Based Contract Administration and HUD's upcoming procurement

Examine critical funding, fair housing, and preservation issues

Explore multifamily finance trends, strategies, and partnerships

Community Meet-Ups

Learn from and network with your peers during the community meet-ups scheduled throughout the Institute. Exchange ideas, best practices, and solutions to common challenges. To contribute to the agenda for your community's meet-up, contact your NCSHA community manager.
Open to NCSHA HFA and Associate members only.

Legislative Conference

March 9 – 11
Washington, DC

Annual Awards for Program Excellence

May 1
Entry Deadline

Housing Credit Connect

June 2 – 5
St. Louis, MO

Annual Conference & Showplace

October 24 – 27
New Orleans, LA

UPCOMING EVENTS

SCHEDULE SUBJECT TO CHANGE

SUNDAY, JANUARY 12

11:00 a.m. – 5:30 p.m.

Registration and Information

1:00 p.m. – 3:30 p.m. | CONCURRENT SESSIONS

HOME Essentials, Part 1

New to the HOME program or looking for a refresher on the basics? Monte Franke is back by popular demand to guide you through the essentials, including eligible activities, affordability and income requirements, monitoring and compliance, community housing development organizations (CHDOs), and program deadlines. *Session continues at 3:45 p.m.*

HOME Rental Compliance, Part 1

Dive into the details of HOME rental compliance requirements with trainer Les Warner in an advanced session covering inspections, rents, utility allowances, income documentation, and tools to track the status of activities and compliance in your portfolio. *Session continues at 3:45 p.m.*

3:45 p.m. – 5:30 p.m. | CONCURRENT SESSIONS

HOME Essentials, Part 2

See session description under Part 1.

HOME Rental Compliance, Part 2

See session description under Part 1.

MONDAY, JANUARY 13

7:30 a.m. – 5:30 p.m.

Registration and Information

8:00 a.m. – 8:55 a.m.

Continental Breakfast

9:00 a.m. – 10:15 a.m.

Breaking News from HUD

Hear the latest developments on HOME and the Housing Trust Fund (HTF) from officials at the Department of Housing and Urban Development (HUD), including updates on allocations, program performance, and expected guidance in 2020.

10:30 a.m. – 12:00 p.m. | CONCURRENT SESSIONS

Resale and Recapture

Discuss how to develop acceptable resale and recapture provisions for HOME homebuyer projects that meet your programmatic goals.

Written Agreements

Explore the required provisions and mechanics of HOME/HTF written agreements and exchange transactional best practices and recommendations.

12:00 p.m. – 1:15 p.m.

Lunch

1:15 p.m. – 2:00 p.m. | CONCURRENT CLINICS

Allocating Costs in HOME Projects

Learn the basic principles of cost allocation and how to use the HOME cost allocation tool.

HOME and HTF Environmental Reviews, Part 1

HUD staff are on hand to guide you through the HOME and HTF environmental review processes and requirements. Hear their differences explained and learn what that means for your internal procedures and documentation. Discuss how to navigate the processes and requirements when projects are funded from both sources — and how to effectively manage it all. *Session continues at 2:15 p.m.*

HTF Basics, Part 1

During this two-part clinic, learn about (or brush up on!) the HTF's key statutory and regulatory requirements and review recent implementation guidance from HUD. *Session continues at 2:15 p.m.*

2:15 p.m. – 3:00 p.m. | CONCURRENT CLINICS

HOME and HTF Environmental Reviews, Part 2

See session description under Part 1.

HTF Basics, Part 2

See session description under Part 1.

Income Eligibility for HOME and HTF

Discuss income eligibility for HOME and HTF beneficiaries and see a demonstration of the Community Planning and Development Income Calculator. Hear how provisions of the Housing Opportunity Through Modernization Act (HOTMA) could impact income eligibility and verification.

3:15 p.m. – 4:00 p.m. | CONCURRENT CLINICS

What's New in IDIS

A HUD expert answers your questions and shares what's new in the Integrated Disbursement Information System for both HOME and HTF.

Relocation Policies and Procedures

How do your relocation policies and procedures measure up? Learn how to plan for relocations and to integrate your planning into your processes.

Working with CHDOs

Do you work with community housing development organizations? Review and ask questions about certification rules, reservation deadlines, and nonprofit capacity issues and workouts for CHDOs.

4:15 p.m. – 5:30 p.m. | CONCURRENT SESSIONS

HOME Monitoring

In this interactive session, discover how to use HUD's updated monitoring exhibits for self-assessments and to develop risk-based monitoring policies and procedures.

Housing Counseling

What does the HUD Housing Counseling Certification Rule mean for HOME and HTF? Review the rule and learn how HFAs and others can meet the upcoming certification exam deadline and participate in housing counseling programs.

Using HOME Reports to Manage Your Programs

Do you know what to review in your HOME reports to help you manage your programs? Exchange best practices as we discuss how to spot warning signs and identify common issues.

5:30 p.m. – 6:30 p.m.

HOME and Housing Trust Fund Networking Reception**TUESDAY, JANUARY 14**

7:30 a.m. – 5:30 p.m.

Registration and Information

8:00 a.m. – 8:55 a.m.

Continental Breakfast

9:00 a.m. – 10:15 a.m. | CONCURRENT SESSIONS

Combining HOME, HTF, and the Housing Credit

How does a state's role as a HOME or HTF lender and Housing Credit allocator affect its strategic approach to managing these resources? Hear about policy and structuring options to mitigate the risk involved with using HOME and HTF funds and share your challenges and best practices.

Homebuyer Programs and Policies

Learn the required elements of a participating jurisdiction's policy for buyer underwriting, responsible lending and subordination, and the special considerations when HOME assistance is provided through mortgage lenders.

10:30 a.m. – 12:00 p.m. | COMMUNITY MEET-UPS
OPEN TO NCSHA HFA AND ASSOCIATE MEMBERS ONLY

Homeownership

Join other HOME and HTF administrators in an informal and candid conversation about homeownership opportunities and hurdles, IDIS, CHDO requirements, and fair housing rules. Exchange ideas on program design, down payment assistance, and housing counseling.

Rental

Join other HOME and HTF administrators to discuss rental challenges and opportunities, such as using IDIS, CHDO requirements, and fair housing rules. Share ideas on underwriting, monitoring, and loan servicing.

SCHEDULE SUBJECT TO CHANGE

TUESDAY, JANUARY 14

TUESDAY AFTERNOON HOUSING CREDIT SESSIONS ARE OPEN TO NCSHA HFA AND ASSOCIATE MEMBERS ONLY. AFFILIATE MEMBERS AND NONMEMBERS, PLEASE PLAN TO CHECK IN ON WEDNESDAY MORNING.

12:30 p.m. – 5:30 p.m.

Registration and Information

1:00 p.m. – 2:30 p.m. | COMMUNITY MEET-UPS

Housing Credit Development

Share program administration experiences and explore emerging issues in Housing Credit allocation, underwriting, and development with development staff from the allocating agencies.

Housing Credit Compliance

Share program monitoring experiences and explore emerging issues in Housing Credit compliance and management with compliance staff from the allocating agencies.

2:45 p.m. – 4:00 p.m.

Treasury and IRS Policy Briefing

Hear about forthcoming program guidance and talk about current reporting and program administration issues with senior officials from the Treasury Department and Internal Revenue Service.

4:15 p.m. – 5:30 p.m.

Housing Credit Investment 101

Go behind the scenes with national investors to learn about the process of investing in Housing Credit developments. Hear the investor perspective on deal selection, Credit pricing, syndicated versus direct investments, timing of equity installments, underwriting criteria, reserve accounts, asset management, compliance monitoring, and property disposition.

WEDNESDAY, JANUARY 15

OPEN TO ALL REGISTERED ATTENDEES

7:30 a.m. – 5:30 p.m.

Registration and Information

8:00 a.m. – 8:55 a.m.

Continental Breakfast

9:00 a.m. – 10:15 a.m.

2020 Housing Credit Program Outlook

Industry leaders offer the inside scoop on Housing Credit topics that will be hot in 2020, including potential legislative and regulatory changes, Community Reinvestment Act reform, equity market trends, development costs, and significant preservation challenges in the existing portfolio.

10:30 a.m. – 11:45 a.m. | CONCURRENT SESSIONS

Data-Driven Development Policy

Three decades of Housing Credit development have provided us with a wealth of data. Join us to discuss the opportunities to use data to inform state agency policies and priorities, including the role of statewide needs assessments, asset management reports, and external market data in developing QAPs and making other policy decisions.

Compliance Hot Topics

Federal officials and compliance experts cover new IRS monitoring requirements, maintaining compliance in developments electing income averaging, HUD tenant data collection, fair housing enforcement, and other emerging issues in Housing Credit compliance and management.

11:45 a.m. – 1:00 p.m.

Lunch

1:00 p.m. – 2:15 p.m.

Income Averaging Development and Compliance Challenges

The implementation of the income averaging minimum set-aside has had a dramatic impact on Housing Credit development and compliance. Hear industry perspectives on income averaging and discuss the latest state agency allocation and monitoring policies and emerging best practices for unit designation, market studies, financial underwriting, and maintaining compliance.

2:30 p.m. – 4:00 p.m. | CONCURRENT SESSIONS

Proactive Preservation Approaches

As a wave of properties face recapitalization at Year 15 and potential conversion to market-rate use at Year 30, we discuss the magnitude of the Housing Credit preservation challenge. What are the policy implications of qualified contract activity and the obstacles to the right of first refusal? How are resyndication, tax-exempt bonds, and other financing tools leveraged effectively in preservation strategies?

Coordinating Compliance with Multiple Subsidies

Compliance and management experts guide you through the conflicting compliance requirements in Housing Credit developments with multiple subsidies. Explore the impact of HOME, the Housing Trust Fund, Section 8, Rental Assistance Demonstration, and other subsidies on project compliance and state monitoring responsibilities.

4:15 p.m. – 5:30 p.m. | CONCURRENT SESSIONS

Dialogue with Housing Credit Developers

National multifamily developers join allocating agency representatives to discuss current Housing Credit challenges, including the intense competition for Credits, construction labor

shortages, volatile construction material pricing, development cost containment, NIMBY concerns, and continued affordability of the aging housing stock.

Compliance and Management Forum

Join other Housing Credit compliance professionals in an open forum covering hot topics, best practices, and emerging challenges in compliance and property management.

5:30 p.m. – 6:30 p.m.

Housing Credit Networking Reception

THURSDAY, JANUARY 16

JOINT WITH SECTION 8 AND OTHER FEDERALLY ASSISTED MULTIFAMILY HOUSING

OPEN TO ALL REGISTERED ATTENDEES

7:30 a.m. – 5:30 p.m.

Registration and Information

8:00 a.m. – 8:55 a.m.

Continental Breakfast

9:00 a.m. – 10:30 a.m. | CONCURRENT SESSIONS

Multifamily Finance Forum

Federal agency officials and multifamily finance experts discuss financial structuring and underwriting strategies for developments using HUD and USDA multifamily programs, the Capital Magnet Fund, tax-exempt bonds, and other financing.

Tenant Qualification Seminar, Part 1

During this program, gain a better understanding of essential Housing Credit and Section 8 tenant qualification procedures, income determination calculations, general public use requirements, application of student rules, and tenant income certifications. *Session continues at 10:45 a.m.*

10:45 a.m. – 12:00 p.m. | CONCURRENT SESSIONS

RAD Development Strategies

What is the future direction of HUD's Rental Assistance Demonstration (RAD) program? What lessons have been learned from recent RAD closings and deal structuring strategies involving Housing Credits, tax-exempt bonds, and HUD financing? Discuss RAD challenges, including demands on HFA resources, development costs, appraisal and tax issues, accessing and administering Project Based Rental Assistance, and preserving the Section 202 portfolio.

Tenant Qualification Seminar, Part 2

In Part 2 of this program, delve deeper into tenant qualification issues, focusing on tenant selection plans and compliance with fair housing and Violence Against Women Act requirements.

SCHEDULE SUBJECT TO CHANGE

WEDNESDAY, JANUARY 15

1:30 p.m. – 5:30 p.m.

Registration and Information2:30 p.m. – 4:00 p.m. | COMMUNITY MEET-UPS
OPEN TO NCSHA HFA AND ASSOCIATE MEMBERS ONLY**Loan Servicing**

Kick off the Institute with a frank discussion on the critical issues affecting HFA servicing operations, including property management, federal regulations and audits, loss mitigation, new business opportunities, and working with master servicers and sub-servicers.

Single-Family Program

Kick off the Institute with a frank discussion on the critical issues impacting HFA affordable homeownership programs, including down payment assistance, developments with Fannie Mae and Freddie Mac, and new business opportunities.

4:15 p.m. – 5:30 p.m.

Homeownership Financing 101: Mortgage Revenue Bonds

How can you optimize your use of Mortgage Revenue Bonds (MRBs) and Mortgage Credit Certificates to help your programs succeed? Industry experts cover the ins and outs of MRBs — the HFAs' traditional means of financing affordable homeownership lending — including eligibility requirements, bond issuance, and structuring deals.

THURSDAY, JANUARY 16

7:30 a.m. – 5:30 p.m.

Registration and Information

8:00 a.m. – 8:55 a.m.

Continental Breakfast

9:00 a.m. – 10:30 a.m.

Straight from the Top: News from Federal Housing Leaders

Senior officials with the Federal Housing Administration (FHA), U.S. Department of Agriculture (USDA), and the Federal Housing Finance Agency (FHFA) share their agencies' visions for 2020 and beyond. Hear about FHFA's plans for reforming Fannie Mae and Freddie Mac and the latest on FHA's efforts to clarify its down payment and other single-family policies.

10:45 a.m. – 12:00 p.m.

The Nuts and Bolts: A Briefing from Federal Housing Partners

Senior program managers from FHA, USDA, Ginnie Mae, and the Veterans Administration take your questions and update you on their agencies' regulations, guidance, and new policies.

12:00 p.m. – 1:15 p.m.

Lunch

1:15 p.m. – 2:30 p.m. | CONCURRENT SESSIONS

Homeownership Financing 102: TBA and MRBs

Explore how to use securitization to finance affordable homeownership loans, including the to-be-announced market; the roles of Fannie Mae, Freddie Mac, and Ginnie Mae; hedging; pipeline management; and how the securitization model can be combined with MRBs.

Servicing Essentials: A Conversation with Federal Program Partners

Senior staff brief you on new developments with their federal agencies' servicing policies and respond to your questions related to insurance claims, property management, and loan modifications.

2:45 p.m. – 4:00 p.m. | CONCURRENT SESSIONS

The Evolving Regulatory Landscape

Senior officials from the Consumer Financial Protection Bureau discuss their plans to address the "QM Patch." Then federal banking officials offer an update on their efforts to amend the Community Reinvestment Act regulations and what that could mean for affordable homeownership. Last but not least, learn what steps you need to take to prepare for the expiration of the London Interbank Offered Rate.

Servicing Essentials: The GSEs and Ginnie Mae

Senior staff from Fannie Mae, Freddie Mac, and Ginnie Mae cover their latest servicing initiatives and what you need to do to keep your programs compliant with their guidelines and quality control criteria, including how to prepare for a Ginnie Mae servicing audit.

4:15 p.m. – 5:30 p.m. | CONCURRENT SESSIONS

In Depth with Fannie, Freddie, and the FHLBs

Delve into the details of Fannie Mae and Freddie Mac's latest initiatives to support affordable homeownership and meet their Duty-to-Serve obligations and discuss how to partner with the Federal Home Loan Banks to finance affordable homeownership.

Servicing Essentials: Industry Outlook

Experienced servicing industry staff and outside experts offer their insights into the pressing issues impacting mortgage servicing today and in the future.

5:30 p.m. – 6:30 p.m.

MRBs and Section 8 Networking Reception**FRIDAY, JANUARY 17**

8:00 a.m. – 8:55 a.m.

Continental Breakfast

8:30 a.m. – 11:30 a.m.

Registration and Information

9:00 a.m. – 10:15 a.m.

Washington and Market Updates

A leading housing economist outlines current trends impacting the home-buying market, and an expert panel briefs you on legislative and regulatory issues that will impact homeownership programs.

10:30 a.m. – 12:00 p.m.

Special Briefing: Managing Your Program's Cybersecurity Risk

How can you, as a program manager, ensure your agency is protecting your borrowers' sensitive data? How should your agency respond if your data is compromised? Legal and cybersecurity experts walk you through your legal obligations, outline strategies for preventing cyberattacks, and share best practices.



SCHEDULE SUBJECT TO CHANGE

WEDNESDAY, JANUARY 15**1:30 p.m. – 5:30 p.m.****Registration and Information****2:30 p.m. – 4:00 p.m.****HUD Multifamily Program Update**

Senior HUD officials share the latest from the Office of Multifamily Housing Programs. Hear about the administration's 2020 priorities, multifamily policy and finance initiatives, and Performance-Based Contract Administration (PBCA) program developments. Delve into how these and other changes will impact the federally-assisted multifamily portfolio across the country.

4:15 p.m. – 5:30 p.m.**Preserving an Aging Housing Stock**

Discuss opportunities and challenges in preserving federally-assisted rental properties and the latest tools and techniques to address the varied needs of an aging portfolio. Get updates on HUD's Section 210 Transfer Authority, Section 8bb rental assistance contract transfers, and USDA Rural Housing Services' actions to address properties with maturing mortgages.

THURSDAY, JANUARY 16**7:30 a.m. – 5:30 p.m.****Registration and Information****8:00 a.m. – 8:55 a.m.****Continental Breakfast****9:00 a.m. – 10:30 a.m. | CONCURRENT SESSIONS
JOINT WITH HOUSING CREDIT****Multifamily Finance Forum**

Federal agency officials and multifamily finance experts discuss financial structuring and underwriting strategies for developments using HUD and USDA multifamily programs, the Capital Magnet Fund, tax-exempt bonds, and other financing.

Tenant Qualification Seminar, Part 1

During this program, gain a better understanding of essential Housing Credit and Section 8 tenant qualification procedures, income determination calculations, general public use requirements, application of student rules, and tenant income certifications.

**10:45 a.m. – 12:00 p.m. | CONCURRENT SESSIONS
JOINT WITH HOUSING CREDIT****RAD Development Strategies**

What is the future direction of HUD's Rental Assistance Demonstration (RAD) program? What lessons have been learned from recent RAD closings and deal structuring strategies involving Housing Credits, tax-exempt bonds, and HUD financing? Discuss RAD challenges, including demands on HFA resources, development costs, appraisal and tax issues, accessing and administering Project Based Rental Assistance, and preserving the Section 202 portfolio.

Tenant Qualification Seminar, Part 2

In Part 2 of this program, delve deeper into tenant qualification issues, focusing on tenant selection plans and compliance with fair housing and Violence Against Women Act requirements.

12:00 p.m. – 1:15 p.m.**Lunch****1:15 p.m. – 2:30 p.m.****Industry Outlook**

Industry leaders share their perspectives on what to expect in 2020 from the administration and Congress, federal funding for Section 8 and other multifamily programs, HUD's PBCA program, and the impact of recent legislative and regulatory changes on HUD property management and preservation.

2:45 p.m. – 4:00 p.m. | CONCURRENT SESSIONS**Hot Topics in Contract Administration, Part 1**

Expert trainer Mary Ross is back to address the most pressing issues facing contract administrators. Join Ross to discuss recent and upcoming changes to HUD Section 8 contract administration and assisted housing requirements, including streamlining; requirements for esignature, etransmission and estorage; a preview of the work done by the Management and Occupancy Review Task Force; and the Tenant Rental Assistance Certification System (TRACS). *Session continues at 4:15 p.m.*

Strategic Approaches to Project-Basing Vouchers

Project-Based Vouchers (PBVs) are the largest, most available tool for creating new project-based rental assistance. Learn how HFAs and other public housing agencies can use project-based Housing Choice vouchers to meet their programmatic goals, especially in tight housing markets. Explore PBV program elements and requirements and delve into strategies for project-basing HUD-VASH and Section 811 mainstreaming vouchers.

4:15 p.m. – 5:30 p.m. | CONCURRENT SESSIONS**Hot Topics in Contract Administration, Part 2**

See session description under Part 1.

Risk-Sharing Roundtable

Join HUD officials and other stakeholders in a roundtable on the FHA-HFA Risk-Sharing Program. Discuss program activity, processing and compliance requirements, and how the loss of financing from the Federal Financing Bank is impacting the program. Exchange best practices and program improvements, including strategies for obtaining additional liquidity for risk-sharing loans.

5:30 p.m. – 6:30 p.m.**Section 8 and MRBs Networking Reception****FRIDAY, JANUARY 17****8:00 a.m. – 8:55 a.m.****Continental Breakfast****8:30 a.m. – 11:30 a.m.****Registration and Information****9:00 a.m. – 10:15 a.m. | CONCURRENT SESSIONS****A Procurement Compendium**

In anticipation of HUD's forthcoming Request for Proposals to rebid PBCA work, get concise and detailed information on bid preparation requirements and protest options.

Multifamily Housing Programs for Vulnerable Populations

Hear updates on Section 811 Housing for Persons with Disabilities, Section 202 Housing for the Elderly, and other HUD multifamily housing programs for vulnerable populations. Discuss HUD's Section 811 Notices of Funding Availability and new opportunities to assume delegate processing responsibilities for Section 202 and 811 awards, as well as challenges and best practices in connecting services to housing.

**10:30 a.m. – 12:00 p.m. | COMMUNITY MEET-UP
OPEN TO NCSHA HFA AND ASSOCIATE MEMBERS ONLY****Contract Administration**

Engage in an informal and open discussion with your HFA peers about what you have heard in previous sessions. Exchange best practices and get answers to your most pressing questions, including those on contract administration, financing techniques, asset management, and compliance monitoring.

SUNDAY, JAN 12	HOME AND HTF
11:00 a.m. – 5:30 p.m.	Registration & Information
1:00 p.m. – 3:30 p.m.	HOME Essentials, Part 1 HOME Rental Compliance, Part 1
3:45 p.m. – 5:30 p.m.	HOME Essentials, Part 2 HOME Rental Compliance, Part 2

MONDAY, JAN 13	HOME AND HTF
7:30 a.m. – 5:30 p.m.	Registration & Information
8:00 a.m. – 8:55 a.m.	Continental Breakfast
9:00 a.m. – 10:15 a.m.	Breaking News from HUD
10:30 a.m. – 12:00 p.m.	Resale and Recapture Written Agreements
12:00 p.m. – 1:15 p.m.	Lunch
1:15 p.m. – 2:00 p.m.	Clinic: Allocating Costs in HOME Projects Clinic: HOME and HTF Environmental Reviews, Part 1 Clinic: HTF Basics, Part 1
2:15 p.m. – 3:00 p.m.	Clinic: Income Eligibility for HOME and HTF Clinic: HOME and HTF Environmental Reviews, Part 2 Clinic: HTF Basics, Part 2
3:15 p.m. – 4:00 p.m.	Clinic: Relocation Policies and Procedures Clinic: What's New in IDIS Clinic: Working with CHDOs
4:15 p.m. – 5:30 p.m.	HOME Monitoring Housing Counseling Using HOME Reports to Manage Your Programs
5:30 p.m. – 6:30 p.m.	Networking Reception: HOME and Housing Trust Fund Module

TUESDAY, JAN 14	HOME AND HTF	HOUSING CREDIT	
7:30 a.m. – 5:30 p.m.	Registration & Information	HOME & HTF PASS	<p>Housing Credit Module Registrants: Not registered for the HOME and HTF Module? Attend networking events and programming from 8:00 a.m. to 12:00 p.m. on Tuesday with an Add-On Pass. See page 9 for details.</p>
8:00 a.m. – 8:55 a.m.	Continental Breakfast		
9:00 a.m. – 10:15 a.m.	Combining HOME, HTF, and the Housing Credit Homebuyer Programs and Policies		
10:30 a.m. – 12:00 p.m.	Community Meet-Up: Rental <i>Open to NCSHA HFA and Associate Members Only</i> Community Meet-Up: Homeownership <i>Open to NCSHA HFA and Associate Members Only</i>		
12:30 p.m. – 5:30 p.m.	<p>HOME and HTF Module Registrants: Not registered for the Housing Credit Module? Attend networking events and programming from 1:00 p.m. to 5:30 p.m. on Tuesday with an Add-On Pass. See page 9 for details.</p>	HOUSING CREDIT PASS I	<p>Registration & Information NOTE: Tuesday afternoon sessions are open to NCSHA HFA and Associate members only. Affiliate members and nonmembers, please plan to check in on Wednesday morning.</p>
1:00 p.m. – 2:30 p.m.			<p>Community Meet-Up: Housing Credit Development <i>Open to NCSHA HFA and Associate Members Only</i></p>
2:45 p.m. – 4:00 p.m.			<p>Community Meet-Up: Housing Credit Compliance <i>Open to NCSHA HFA and Associate Members Only</i></p>
4:15 p.m. – 5:30 p.m.			<p>Treasury and IRS Policy Briefing <i>Open to NCSHA HFA and Associate Members Only</i></p>
			<p>Housing Credit Investment 101 <i>Open to NCSHA HFA and Associate Members Only</i></p>

WEDNESDAY, JAN 15	HOUSING CREDIT	MRBs	SECTION 8
7:30 a.m. – 5:30 p.m.	Registration & Information	HOUSING CREDIT PASS II	<p>MRB and Section 8 Module Registrants: Not registered for the Housing Credit Module?</p> <p>Attend networking events and programming from 8:00 a.m. to 2:15 p.m. on Wednesday with an Add-On Pass.</p> <p>See page 9 for details.</p>
8:00 a.m. – 8:55 a.m.	Continental Breakfast		
9:00 a.m. – 10:15 a.m.	2020 Housing Credit Program Outlook		
10:30 a.m. – 11:45 a.m.	Data-Driven Development Policy Compliance Hot Topics		
11:45 a.m. – 1:00 p.m.	Lunch		
1:00 p.m. – 2:15 p.m.	Income Averaging Development and Compliance Challenges		
1:30 p.m. – 5:30 p.m.		Registration & Information	Registration & Information
2:30 p.m. – 4:00 p.m.	Proactive Preservation Approaches Coordinating Compliance with Multiple Subsidies	<p>Community Meet-up: Loan Servicing <i>Open to NCSHA HFA and Associate Members Only</i></p> <p>Community Meet-up: Single-Family Program <i>Open to NCSHA HFA and Associate Members Only</i></p>	HUD Multifamily Program Update
4:15 p.m. – 5:30 p.m.	Dialogue with Housing Credit Developers Compliance and Management Forum	Homeownership Financing 101: Mortgage Revenue Bonds	Preserving an Aging Housing Stock
5:30 p.m. – 6:30 p.m.	Networking Reception : Housing Credit Module		

THURSDAY, JAN 16	HOUSING CREDIT	MRBs	SECTION 8
7:30 a.m. – 5:30 p.m.	Registration & Information	Registration & Information	Registration & Information
8:00 a.m. – 8:55 a.m.	Continental Breakfast	Continental Breakfast	Continental Breakfast
9:00 a.m. – 10:30 a.m.	Multifamily Finance Forum <i>Joint with Section 8</i> Tenant Qualification Seminar, Part 1 <i>Joint with Section 8</i>	Straight from the Top: News from Federal Housing Leaders	Multifamily Finance Forum <i>Joint with Housing Credit</i> Tenant Qualification Seminar, Part 1 <i>Joint with Housing Credit</i>
10:45 a.m. – 12:00 p.m.	RAD Development Strategies <i>Joint with Section 8</i> Tenant Qualification Seminar, Part 2 <i>Joint with Section 8</i>	The Nuts and Bolts: Briefing from Federal Housing Partners	RAD Development Strategies <i>Joint with Housing Credit</i> Tenant Qualification Seminar, Part 2 <i>Joint with Housing Credit</i>
12:00 p.m. – 1:15 p.m.	<p>Housing Credit Module Registrants: Not registered for the MRBs or Section 8 modules?</p> <p>Attend networking events and programming from 12:00 p.m. to 6:30 p.m. on Thursday with an Add-On Pass.</p> <p>See page 9 for details.</p>	Lunch	Lunch
1:15 p.m. – 2:30 p.m.		Homeownership Financing 102: TBA and MRBs	Industry Outlook
2:45 p.m. – 4:00 p.m.		Servicing Essentials: A Conversation with Federal Program Partners	Hot Topics in Contract Administration, Part 1
4:15 p.m. – 5:30 p.m.		The Evolving Regulatory Landscape	Strategic Approaches to Project-Basing Vouchers
5:30 p.m. – 6:30 p.m.		Servicing Essentials: The GSEs and Cinnie Mae	Hot Topics in Contract Administration, Part 2
		In Depth with Fannie, Freddie, and the FHLBs	Risk-Sharing Roundtable
		Servicing Essentials: Industry Outlook	Networking Reception: MRBs and Section 8 Modules
		Networking Reception: MRBs and Section 8 Modules	Networking Reception: MRBs and Section 8 Modules

FRIDAY, JAN 17	MRBs	SECTION 8
8:30 a.m. – 11:30 a.m.	Registration & Information	Registration & Information
8:00 a.m. – 8:55 a.m.	Continental Breakfast	Continental Breakfast
9:00 a.m. – 10:15 a.m.	Washington and Market Updates	A Procurement Compendium Multifamily Housing Programs for Vulnerable Populations
10:30 a.m. – 12:00 p.m.	Special Briefing: Managing Your Program's Cybersecurity Risk	Community Meet-Up: Contract Administration <i>Open to NCSHA HFA and Associate Members Only</i>

Why Washington, DC?

The HFA Institute is held in the nation's capital to allow maximum participation by federal policy-makers and regulators.

Attendance Policy

Unless otherwise noted, sessions in each of the HFA Institute modules are open to NCSHA members and nonmembers. NCSHA members may not register as guests. For more information on how to become a member, contact Phaedra Stoger at membership@ncsha.org.

Extend the Institute Experience

Six-Day Pass

Attend all four HFA Institute modules for the price of three! Attend sessions in any module throughout the week as your schedule allows. To take advantage of the Six-Day Pass, complete the [Registration Form](#) and return it to NCSHA with your payment. *This pass is non-transferable and non-refundable.*

Add-On Pass: \$195

Make the most of your time in Washington, DC: Register for a half day of a second module for \$195. The pass includes admission to all the educational programming, networking, and meals scheduled during that timeframe. *The Add-On Pass is available only to attendees registered for one of the Institute's four modules; it is non-transferable and non-refundable. Contact registration@ncsha.org for assistance; these passes cannot be purchased online.*

Add-On HOME and HTF Pass

(Tuesday, January 14, 8:00 a.m. – 12:00 p.m.)

Add-On Housing Credit Pass I*

(Tuesday, January 14, 1:00 p.m. – 5:30 p.m.)

Add-On Housing Credit Pass II

(Wednesday, January 15, 8:00 a.m. – 2:15 p.m.)

Add-On MRBs/Section 8 Pass

(Thursday, January 16, 12:00 p.m. – 6:30 p.m.)

**Available only to NCSHA HFA and Associate members*

Guest Registration

A special registration is available for \$85 that admits your guest to the reception included with your registration package. To register your guest, please contact the NCSHA Registrar; guest registration is not available online. All guests, including children of attendees, must present a guest badge to be admitted to receptions. *Each guest registrant must be associated with a registered conference attendee. NCSHA members may not register as guests.*

Speaker Registration Policy

NCSHA requires that all speakers and discussion leaders register for the conference.

Registration Fees

Register by Monday, December 9, to take advantage of early registration discounts.

Payment Postmark	HFA or Associate Member		Affiliate Member		Nonmember		Guest
	By 12/9/19	After 12/9/19	By 12/9/19	After 12/9/19	By 12/9/19	After 12/9/19	
HOME and Housing Trust Fund Module (January 12 – 14)	\$455	\$515	\$525	\$580	\$585	\$640	\$85
Housing Credit Module (January 14 – 16)	\$455	\$515	\$525	\$580	\$585	\$640	\$85
MRBs and Other Federal Homeownership Programs Module (January 15 – 17)	\$455	\$515	\$525	\$580	\$585	\$640	\$85
Section 8 and Other Federally Assisted Multifamily Housing Module (January 15 – 17)	\$455	\$515	\$525	\$580	\$585	\$640	\$85
Six-Day Pass	\$1,315	\$1,495	\$1,525	\$1,690	\$1,705	\$1,870	—

Registration and Payment

To register online, go to www.ncsha.org/HFAi and click Register. Credit cards are accepted for online registration only. To pay by check, print your invoice and mail it with payment to NCSHA. Make checks payable to NCSHA.

To register by fax or mail, print the [Registration Form](#) and return it to NCSHA along with your payment.

Each registrant must pay in full prior to the conference. Only those who have paid in full will be admitted to Institute activities.

Special Needs/Dietary Requests

If you have special needs under the Americans with Disabilities Act — or if you have special dietary requirements — please explain those needs in the space provided online in the ADA Needs text box on the Event Registration page or on the Registration Form.

Cancellation Policy

Cancellations must be received in writing. Confirmation of faxed cancellations may be required. A \$75 administrative fee will be deducted from all approved refunds. No refunds will be given for cancellations received after the cancellation cutoff day of **Tuesday, December 24**, or for registrants who fail to attend the conference. "No shows" will be billed the full registration fee.

Hotel Accommodations

Please make a reservation well before the Monday, December 9, hotel cutoff date to ensure availability.

Institute Headquarters Hotel:
JW Marriott Washington, DC
1331 Pennsylvania Avenue, NW
Washington, DC 20004
Reservations: 202-393-2000
Room Rate: \$294/night, single or double

Room Reservation Policy

You must register for the HFA Institute with NCSHA before making a hotel reservation within the NCSHA room block. To make a hotel reservation, call the JW Marriott and identify yourself as an

NCSHA attendee to receive the HFA Institute discount, or register online using the link provided in your registration confirmation email.

Hotel rooms within NCSHA's room block are for HFA Institute registrants. Once registered, please do not reserve multiple hotel rooms or make reservations in the block for people who are not registered for the conference. NCSHA will review the hotel reservation lists weekly and notify people found holding duplicate reservations or reservations without corresponding registrations. **Failure to register within two business days thereafter will result in cancellation of these reservations within NCSHA's block without further notice.**

CPE Sponsor

NCSHA 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 to the National Registry of CPE Sponsors through its website: learningmarket.org

NCSHA's HFA Institute features a comprehensive series of sessions for both new professionals and seasoned practitioners. No advanced preparation is required for the conference; however, a basic knowledge of state housing finance agencies and their programs is necessary due to the intermediate program level. You can earn approximately 14 – 16 credits per module if you attend all sessions. The number varies based on the module(s) attended.

Continuing Legal Education Credit

Those seeking CLE credit must apply directly to their state bar associations. For more information, visit the NCSHA Registration Desk during the HFA Institute.



Questions

Contact NCSHA at registration@ncsha.org or 202-624-7710 with registration or housing questions or for assistance. More information on registration policies, accommodations, and ground transportation is available at www.ncsha.org/HFAi.

SPONSORSHIP OPPORTUNITIES

Partner with NCSHA during the HFA Institute to increase your company's visibility with the state housing finance agencies and their partners. Contact Kimberly Carr at sponsors@ncsha.org or 202-624-5424 to discuss how your company can benefit from sponsorship.

SPONSORS



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Plan now to participate in this unparalleled, once-a-year training opportunity! Register for one or more modules today at www.ncsha.org/HFAi.

**HOME and
Housing Trust
Fund**
JANUARY 12 – 14

Housing Credit
JANUARY 14 – 16

**MRBs and
Other Federal
Homeownership
Programs**
JANUARY 15 – 17

**Section 8 and
Other Federally
Assisted
Multifamily
Housing**
JANUARY 15 – 17



**Early
Registration
and Hotel Group
Rate Cutoff:
December 9**

THE HFA INSTITUTE

JANUARY 12 – 17, 2020 | JW MARRIOTT | WASHINGTON, DC



National Council of
State Housing Agencies

444 North Capitol Street NW, Suite 438
Washington, DC 20001