

# Illinois Housing Development Authority Owner Agent Training

JUNE 11-12, 2025 – SPRINGFIELD, ILLINOIS

Welcome to the Illinois Housing Development Authority's (IHDA) inaugural Owner Agent Training. We look forward to sharing our insights during this training while learning about your challenges and how we can help. Your feedback is important. Remember to fill out the survey after each session and don't hesitate to ask questions.

For more information, contact IHDA's Asset Management team at [AMTraining@ihda.org](mailto:AMTraining@ihda.org).

## DAY 1: WEDNESDAY, JUNE 11

8:00-8:50 **CHECK-IN, BREAKFAST, AND NETWORKING**  
*Main Floor*

9:00-9:20 **OPENING KEYNOTE AND TEAM INTRODUCTION**  
*Main Floor*  
**Lead Presenters:** **Myriam Weaver**, Managing Director, IHDA Asset Management and **Dunni Cosey Gay**, Deputy Director, IHDA Asset Management

9:20-10:50 **CORE COMPLIANCE AND KEY UPDATES**  
*Main Floor*  
**Lead Presenter:** **Scott Michael**, CEO and President, Costello Compliance

### **HOTMA: What's In, What's Out, and What You Need to Do Now**

A comprehensive walk-through of the latest HOTMA guidance – unpacking key impacts, timelines, and implementation strategies.

### **Making the Math Work: Demystifying Income Averaging**

Take a practical look at the Income Average Test using both 100% affordable and mixed-income examples to highlight common challenges and smart solutions.

### **Timing is Everything: Mastering NAVU and AIT Rules**

A structured dive into Next Available and Vacant Unit compliance providing a stronger grasp of how timing impacts tax credit eligibility.

11:00-11:30 **LEVERAGING RESOURCES: IHDA.ORG AND NAVIGATING COMPLIANCE CONNECTION**  
*Main Floor*

**Lead Presenter:** **Steven White**, Asset Manager, IHDA Asset Management

Access a toolbox of resources used to assist Owners and Agents in understanding the fundamentals of rental compliance, policies and procedures, templates, and other materials required to establish and maintain program compliance.

WiFi network: **visitor**  
WiFi password: **visitoraccess**

Scan the QR Code  
to link to the online  
information.



## DAY 1: WEDNESDAY, JUNE 11

- 11:30-12:50 **MASTERING FINANCIAL REGULATORY REQUIREMENTS: RESERVE REQUEST BEST PRACTICES**  
*Main Floor*  
**Lead Presenter: Charles Walsh**, Financial Analyst, IHDA Asset Management  
Explore key aspects of financial compliance, insurance requirements, and reserve requests essential for maintaining fiscal responsibility and risk management. Attendees will gain practical insights into regulatory expectations, best practices for general insurance documentation, and strategies for managing reserve funding efficiently.
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- 1:00-1:50 **LUNCH**  
*Main Floor*
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- 2:00-2:50 **MASTERING COMPLIANCE: UNDERSTANDING REQUIRED FORMS AND AGREEMENTS**  
*Main Floor*  
**Lead Presenter: Desiree Hall**, Compliance Analyst, IHDA Asset Management  
Learn key insights to IHDA's annual compliance forms and supporting documents. The session will explain the Affirmative Fair Housing Marketing Plan, Tenant Selection Plan, Rent and Utility Allowances, Consolidated Certificate of Compliance, and other compliance documents to help save time, reduce emails, and to expedite documentation for approval.  
OR  
**MOR BINDER BOOTCAMP: TABS, FINANCIALS, AND BEYOND**  
*3rd Floor / Room B*  
**Lead Presenter: Denise Rankin**, Senior Asset Manager, IHDA Asset Management  
A step-by-step process to Plan, Prepare, and Execute the Binder Preparation for the Management and Occupancy Review (MOR) to ensure program compliance.
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- 3:00-3:50 **BEHIND THE SCENES: UNDERSTANDING THE TEAMS THAT PROCESS YOUR WORK**  
*Main Floor*  
**Lead Presenter: Heather Metcalf**, Compliance Analyst, IHDA Asset Management  
Understand the most frequent errors found in IHDA compliance document submissions, Affirmative Fair Housing Marketing Plans, Tenant Selection Plans, Rent Schedules and Utility Allowance Requests, Consolidated Certificates of Compliance, and Management Agreement Extensions. You will learn best practices, tips for accurate file submission, and how to avoid compliance issues that can delay approvals or lead to noncompliance findings.  
OR  
**BREAKING BARRIERS: PICKING UP THE PIECES TO BUILD SOLUTIONS**  
*3rd Floor / Room B*  
**Lead Presenter: Paula Lewis**, Senior Manager, IHDA Asset Management  
This interactive training is designed to support owners/agents in addressing common barriers that impact occupancy and resident access. Participants will explore a range of challenges they regularly encounter, with focused discussion on the screening process, occupancy issues, and reasonable accommodation requests.
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- 4:00-4:20 **DAY 1 CLOSING REMARKS**  
*Main Floor*
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## DAY 2: THURSDAY, JUNE 12

8:00-8:50 **CHECK-IN, GRAB AND GO BREAKFAST**  
*Main Floor*

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8:50-9:00 **DAY 2 INTRODUCTION**  
*Main Floor*

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9:00-9:50 **LEADING BY EXAMPLE: BEST PRACTICES FROM HIGH-PERFORMING OWNERS AND AGENTS**  
*Main Floor*  
**Lead Presenter: Erica Myles**, Training and Technical Assistance Manager, CIC  
Delivering affordable, high-quality rental units is the goal and mission of many housing providers. Expecting a decent return on investment is just as important. Attend this session for a different way to think about higher profits from managing rentals. Hear examples of how high-performing investors work smarter to attract and retain the most desirable renters and what motivates them to stay long-term. Explore how the power of networking and effective collaboration among owners and managers can benefit across all developments.

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10:00-10:50 **MASTERING PHYSICAL INSPECTIONS**  
*Main Floor*  
**Lead Presenter: Charlotte Pickens**, Manager Physical Inspection, IHDA Asset Management  
Learn how to master physical inspections, the process, and frequency. Attendees will gain practical insights on acceptable compliance documentation, inspection protocol, inspection results, and reporting of non-compliance.  
  
OR  
**REGULATORY KNOWLEDGE: DECODING REGULATORY AGREEMENTS AND OTHER LEGAL DOCS**  
*3rd Floor / Room B*  
**Lead Presenter: Ana Cruz**, Asset Manager, IHDA Asset Management  
Insight and understanding of compliance requirements of Regulatory Agreements and other legal documents – without needing a law degree. We will identify income limits, rent caps, and AMI requirements in addition to tools and tips to ensure the success of your projects. Join us as we dive into the backbone of your compliance requirements documents.

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11:00-12:30 **NAVIGATING COMPLEXITY: LAYERED PROGRAMS AND EVOLVING PROTECTIONS**  
*Main Floor*  
**Lead Presenter: Scott Michael**, CEO and President, Costello Compliance  
  
**Beyond the Basics: VAWA Compliance and What's New in 2025**  
Go beyond policy and explore practical applications of VAWA compliance with an emphasis on recent changes and their real-life implications.  
  
**Layered Like a Pro: Combining HUD 811 RAC with LIHTC or HOME**  
Discussion to unpack the nuances of multi-program compliance, providing the clarity you need to confidently manage blended funding structures.  
  
**When Rural Meets Regulation: LIHTC + Rural Development Compliance Made Simple**  
Demystify dual compliance for RD and LIHTC properties to offer meaningful clarification.

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12:30-1:00 **CLOSING REMARKS**  
*Main Floor*  
**Lead Presenter: Karen Davis**, Deputy Executive Director, IHDA

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