

ILLINOIS HOUSING DEVELOPMENT AUTHORITY

OWNER AGENT TRAINING

March 24 – 25, 2026 – Chicago, Illinois

Day 1: Tuesday, March 24

Office Hours

9:00 a.m. – 4:00 p.m.

Mastering Compliance – IHDA Office Hours

Barbara Hunt, Compliance Analyst, IHDA; **Pamela Barbee**,
Compliance Analyst, IHDA
Sign up with QR code



2:00 p.m. – 4:30 p.m.

Housing Authority of Cook County Office Hours

Sign up with QR code



Training Sessions

8:00 a.m. – 8:45 a.m.

Check-In, Breakfast, & Networking

8:45 a.m. – 9:00 a.m.

Opening Keynote & Team Introductions

Lead Presenter: Myriam Weaver, Managing Director of Asset Management, IHDA

9:00 a.m. – 9:20 a.m.

Preservation 2.0

Lead Presenter: Nelson Jimenez, Assistant Director – Portfolio Analysis, IHDA
An information session on IHDA's open application for the Preservation Limited Rehabilitation Program 2.0, a new funding opportunity that will provide subordinate financing to IHDA-assisted developments with capital improvement needs.

9:20 a.m. – 12:00 p.m.

Core Compliance & Key Updates

Lead Presenter: Scott Michael Dunn, CEO & President, Costello Compliance
Final HOME Rule, new IRS guidance on the Average Income Test, and other LIHTC compliance trends and updates.

12:00 p.m. – 12:30 p.m.

Leveraging Resources and Understanding Documents

Lead Presenters: Lucas Anderson, Senior Policy & Process Specialist, IHDA; **John Wischnewsky**, Project Coordinator, IHDA
Explore a toolbox of resources that can 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.

Wi-Fi network: Study Meetings and Events

Wi-Fi password: StudyHotels

12:30 p.m. – 1:30 p.m.	Lunch Break
1:30 p.m. – 2:20 p.m.	<p>MOR Binder Bootcamp: Tabs, Financials, And Beyond</p> <p>Lead Presenter: Courtney Sanders, Asset Manager, IHDA</p> <p>Gain insight into the step-by-step process to plan, prepare, and execute the binder for the Management & Occupancy Review (MOR) to ensure program compliance.</p>
2:20 p.m. – 3:10 p.m.	<p>Avoiding Common Compliance Errors: Best Practices for IHDA Document Submissions</p> <p>Lead Presenter: Heather Metcalf, Asset Manager, IHDA</p> <p>Gain a better understanding of the most common errors found in frequently submitted compliance documents including Affirmative Fair Housing Marketing Plans, Tenant Selection Plans, Rent Schedules and Utility Allowances, and more. Learn best practices, tips for accurate file submission, and how to avoid compliance issues that can delay approvals or lead to non-compliance findings.</p>
3:10 p.m. – 3:20 p.m.	Stretch Break
3:20 p.m. – 3:50 p.m.	<p>Chicago Housing Authority</p> <p>Lead Presenter: Theresa Olson, Deputy Chief – Asset Management, CHA</p>
3:50 p.m. – 4:20 p.m.	<p>Chicago Department of Housing</p> <p>Lead Presenter: Aja Bonner, Assistant Commissioner, Chicago DOH</p>
4:20 p.m. – 4:35 p.m.	Day 1 Closing Remarks

Day 2: Wednesday, March 25

Office Hours

2:00 p.m. – 4:30 p.m.	<p>Housing Authority of Cook County Office Hours</p> <p><i>Sign up with QR code</i></p>
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Training Sessions

8:00 a.m. – 8:45 a.m.	Check-In, Breakfast, & Networking
8:45 a.m. – 9:00 a.m.	<p>Day 2 Opening Keynote</p> <p>Lead Presenter: Kristin Faust, Executive Director, IHDA</p>
9:00 a.m. – 10:30 a.m.	<p>Navigating HOTMA</p> <p>Lead Presenter: Scott Michael Dunn, CEO & President, Costello Compliance</p> <p>Housing Opportunity through Modernization (HOTMA) implementation, file review monitoring, and readiness.</p>

10:30 a.m. – 11:20 a.m.	<p>Mastering Physical Inspections</p> <p>Lead Presenter: Jose Zavala, Senior Physical Inspector, IHDA</p> <p>Learn how to master physical inspections, the process, and frequency. Gain practical insights on acceptable compliance documentation, inspection protocol, inspection results, and reporting of non-compliance.</p>
11:20 a.m. – 11:30 a.m.	<p>Stretch Break</p>
11:30 A.M. – 12:30 P.M.	<p>Mastering Financial Regulatory Requirements: Reserve Best Practices</p> <p>Lead Presenter: Charles Walsh, Senior Financial Analyst, IHDA</p> <p>Learn key aspects of financial compliance, insurance requirements, and reserve requests essential for maintaining fiscal responsibility and risk management. Discussion topics will include regulatory expectations, general insurance documentation, and strategies for managing reserve funding efficiently.</p>
12:30 p.m. – 1:30 p.m.	<p>Lunch Break</p>
1:30 p.m. – 2:20 p.m.	<p>Leading By Example: Best Practices from High-Performing Owners & Agents</p> <p>Lead Presenter: Erica Myles, Training & Technical Assistance Manager, CIC</p> <p>Delivering high-quality rental units is the goal of many housing providers. Expecting a decent return is just as important. Hear examples of how high-performing investors work smart to attract renters, and what motivates them to stay long term. Explore how the power of networking and effective collaboration among owners and managers can benefit all developments.</p>
2:20 p.m. – 3:10 p.m.	<p>Regulatory Knowledge: Decoding Regulatory Agreements and Other Legal Documents</p> <p>Lead Presenter: Ana Cruz, Asset Manager, IHDA</p> <p>Dive into the backbone of IHDA’s compliance requirements. This session assists in understanding the compliance of Regulatory Agreements and other legal documents, without needing a law degree. We will identify income limits, rent caps, and area median income requirements, in addition to other tools and tips to ensure the success of your property.</p>
3:10 p.m. – 3:20 p.m.	<p>Stretch Break</p>
3:30 p.m. – 4:50 p.m.	<p>Compliance Under the Microscope: Preparing for Increased Regulatory Oversight</p> <p>Lead Presenter: Scott Michael Dunn, CEO & President, Costello Compliance</p> <p>Preparing for increased regulatory scrutiny, best practices for owners and agents.</p>
4:50 p.m. – 5:00 p.m.	<p>Day 2 Closing Remarks</p>