



# Housing Professionals Webinar Series

March 20 - 24, 2023

*LeadingAge*<sup>®</sup>  
New York

**REGISTRATION IS NOW OPEN!**

# LeadingAge New York

## Housing Professionals Webinar Series

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### 2023 Housing Professionals Webinar Series

#### 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 put into practice immediately!

This series is approved as a Housing and Urban Development (HUD) and Division of Housing and Community Renewal (DHCR) allowable expense.

#### Registration Information

**\$299** LeadingAge New York member/non-member - includes access to all webinars and online materials.

#### **CLICK HERE TO REGISTER**

We accept Visa, MasterCard, American Express, and Discover. Check payments can be accommodated when necessary; however, *registration will not be complete until payment is received*. **Full payment must be received before the start of the program to ensure your access to the webinars and materials.** Those who registered but do not attend the virtual event are still responsible for payment in full if not already paid.

**Cancellations will not be accepted, and refunds will not be issued for this series.**

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### **PROGRAM**

All times are given in Eastern Standard Time (EST)

#### **Monday, March 20**

11 a.m. – noon

##### **Addressing Burnout and Improving Wellbeing: How to Find Your Center**

Certified Life Coach, Wellness Consultant, and Mindfulness Facilitator Kim Perone examines the difference between stress and burnout and guides us to understand how to identify our current state and ways to improve our wellbeing, while still accomplishing everything we need and want to do in life.

*Kimberly A. Perone, MA, CLC, CWMF, Success, Bereavement & Resilience Coach & Mindfulness Facilitator, The Center for Clarity, Compassion & Contentment, Ballston Lake, NY*

1:30 – 2:30 p.m.

##### **Building a Trusting Relationship with a Hoarding Resident**

The presentation will cover basic information related to Hoarding Disorder, including the difference between someone who has a lot of clutter and someone who is struggling with hoarding behaviors, health and safety issues, assessment tools, positive communication tips, and harm reduction strategy tips.

*Lisa M. O'Neill, DBH, MPH, UA Center on Aging, Associate Director of Education and Policy, UA College of Medicine, Assistant Professor, Geriatrics, General Internal Medicine, and Palliative Medicine, Tucson, AZ*

3 – 4:30 p.m.

##### **Medical Expenses, Allowances, and Deductions**

This session will cover how to identify, verify, and calculate different types of medical expenses. It will cover potential allowances and deductions that are allowable, including those associated with assistance animals and auxiliary devices, and other types of care assistance.

*Rhanda McKown, (HUD Occupancy Specialist, Certified in LIHTC Compliance) Director of Affordable Housing, LeadingAge Florida, Tallahassee, FL*

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### Tuesday, March 21

10 – 11 a.m.

#### **U.S. Housing and Urban Development Policy Update**

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

*Dean J. Santa, Asset Management Division Director, Multifamily Asset Management – Federal Region 2, U.S. Department of Housing and Urban Development, New York, NY*

1:30 – 3 p.m.

#### **Excite and Engage Independent Seniors**

As individuals get older, it is not uncommon to notice that they have developed some feelings of indifference toward their normal activities. Daily activities may become more difficult to perform over time, which may leave them feeling less energized or depressed. Although they may require some motivation to stay involved, it is important to find the positivity and encourage them to stay active. Attend this interactive session to gain insight on the interpersonal skills and strategies to encourage and motivate older adults.

*Bailie Hillman, OT, LNHA, Certified Dementia Practitioner and Trainer, Consultant, Azle, TX*

### Wednesday, March 22

11 a.m. – noon

#### **What Senior Housing Providers Need to Know About Cannabis**

The program will provide an overview of the current legal landscape of cannabis in New York, which continues to evolve due to significant legal updates on both the state and federal level. Topics to be addressed will include: - An overview of state and federal cannabis laws, analysis of potential financial risk to health care facilities and senior housing communities that permit or support medical cannabis

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use by residents, and how to mitigate that risk, labor and employment issues , an in-depth discussion of why medical cannabis is effective in the senior community and why there is such a growing demand for cannabis as part of the overall medical treatment plan for senior citizens.

Dana Walsh Sivak, Esq., Senior Counsel, Falcon Rappaport & Berkman LLP, Rockville Centre, NY

*Michael Curatola, Esq., Associate, Falcon Rappaport & Berkman LLP, Rockville Centre, NY*

1:30 – 2:45 p.m.

### **Title VI, Marketing, and the Application Process - What Housing Professionals Need to Know**

For housing providers receiving federal funding, Title VI of the US Civil Rights Act prohibits denial of an applicant based on race, ethnicity, or national origin and further protects the rights of all individuals to learn about their federally funded housing options. This session will help affordable senior housing program managers understand the scope of housing activities covered by Title VI, review recent federal guidance on the issue, and explore best practices to ensure effective organizational marketing and application policies that comply with Title VI requirements.

*Harry J. Kelly, Partner, Nixon Peabody, Washington, DC*

### **Thursday, March 23**

11 a.m. – noon

### **Situations & Strategies**

During this solution-focused session, our presenter will discuss service coordination issues you face day-to-day in your organization, such as difficult situations and mental health challenges.

*Ruben Rivera Jackman, MNPL, Social Services Coordinator, Human Good, Seattle, WA*

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1 – 2:30 p.m.

### **Streamlining HUD Certifications**

In May of 2020 HUD published a Final Rule finalizing the regulatory language to implement the FAST Act provisions contained in the December 2017 interim. Specifically, this Final Rule amended regulations as it relates to asset verification, utility allowance reimbursements, and triennial income verification. The rule reduces the burden of verifying household assets when determining a household's income upon recertification and also reduces the burden of verifying fixed income sources when determining a household's income upon recertification. This session will provide valuable information relating to the streamlining provision and show how to implement these provisions at a HUD Multi-Family property.

*Gary Kirkman, Director of Compliance Training, U.S. Housing Consultants, Chichester, NH*

3 – 4:30 p.m.

### **Conquer Recerts and Interim Recerts**

A household's income and household composition must be reviewed and updated at least annually. This annual review is referred to as a "recertification." An "interim recertification" is conducted between annual recerts to account for changes in household circumstances that could affect the tenant's rent portion and the assistance being paid on their behalf. Understanding how these recertifications are handled can be confusing at times to even the most seasoned employee. This session discusses the recertification and interim recertification process from the owner/agent responsibilities to what the tenants have to do in order to stay in compliance.

*Gary Kirkman, Director of Compliance Training, U.S. Housing Consultants, Chichester, NH*

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### Friday, March 24

11 a.m. – noon

#### **HUD's Latest Expectations for Service Coordinators**

The presenter will address HUD's latest requirements for service coordinators, including new standards for training, record keeping, and resident interactions. Don't miss this opportunity to explore the impact that service coordinators have in their housing communities, innovations in service coordination models, and the future of the profession.

*Melissa Harris, Senior Government Affairs Manager, American Association of Service Coordinators, Powell, OH*

1:30 – 3:30 p.m.

#### **Resident File Compliance for HUD Properties**

This session will highlight the items in the tenant file that are reviewed during a Management and Occupancy Review (MOR). It will discuss how to avoid common tenant file errors and will include tips on how to enhance compliance in resident files.

*Rhanda McKown (HUD Occupancy Specialist, Certified in LIHTC Compliance)  
Director of Affordable Housing, LeadingAge Florida, Tallahassee, FL*

### **SPEAKERS**



**Kim Perone, MA, CLC, CWMF**

***Success, Bereavement & Resilience Coach and Mindfulness Trainer, Center for Clarity, Compassion & Contentment (CENTER4C)***

Kim Perone works with organizations and individuals to offer essential skills for today. A personal strategist, philosopher, and champion for her clients, specializing in stress reduction, mindfulness, work life balance, bereavement, resilience, and authentic success, she is a Certified Life

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Coach with a Master's degree in Organizational Communication, Certified Workplace Mindfulness Facilitator (CWMF), a Certified Grief Educator, CultureTalk Certified Partner, author of *The Case for Clarity, Compassion & Contentment: Finding Your Center* (available on Amazon) and podcaster of *Find Your Center* with Life Coach Kim Perone. It is Kim's belief that when clarity, compassion, and contentment are present an inspired life is possible.



**Lisa M. O'Neill, DBH, MPH**

***Associate Director of Education and Policy; Assistant Professor, Geriatrics, General Internal Medicine, and Palliative Medicine, University of Arizona Health Services***

Lisa O'Neill is currently Clinical Assistant Professor, Medicine at the University of Arizona Health Sciences where she serves as Associate Director of Research & Education at their Center on Aging. She is also Program Manager, Arizona Geriatrics Workforce Enhancement Program and an Aging & Cognition Scholar, UA Center on Aging and CDC Healthy Brain Research Network. She is an Appointed Member, Arizona Governor's Advisory Council on Aging and an Associate, Arizona Alzheimer's Taskforce. She serves on the Arizona Attorney General's SAFE (Stop Abuse and Financial Exploitation of Elders) and is a Board Member of the National Adult Protective Services Association.



**Rhanda McKown**

***Director of Affordable Housing, LeadingAge Florida***

Rhanda McKown has served as the Director of Affordable Housing for LeadingAge Florida since January of 2022. Her primary focus in this role is developing a robust housing education agenda, providing assistance and insight to members on housing issues, and contributing directly to the development and achievement of a housing advocacy agenda. Rhanda previously served as the Local Contract Specialist for the North Tampa Housing Development Corporation. She has nearly 20 years of experience in



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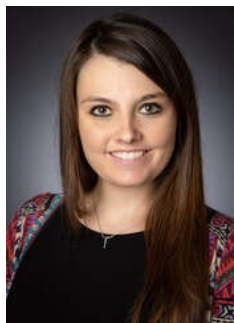
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various aspects of the housing industry and spent the last 15 years conducting Management and Occupancy Reviews (MOR) under the Performance Based Contract Administration (PBCA) contract in Florida. Rhanda graduated with a Bachelor of Science from Florida State University and lives in Ocala with her 10-year-old daughter.

### **Dean J. Santa**

***Asset Management Division Director, Multifamily Asset Management – Federal Region 2, U.S. Department of Housing and Urban Development***

Dean Santa has worked in real estate for over 35 years, both in government and the private sector. He managed his own real estate appraisal company and sales office before joining HUD in 1997. He worked in the Asset Management Branch of Multifamily Housing as a Senior Asset Manager for 15 years where he was the point of contact for many complex programs. He served as the Director of Multifamily for the HUD Newark Program Center before becoming the Asset Management Division Director for the New York Northeast Regional Office. Dean oversees the NY, Buffalo, and NJ offices, covering 2,400 Assets that house over 300,000 families. He studied business and real estate law at the College of Staten Island.



### **Bailie Hillman, OT, LNHA**

***Certified Dementia Practitioner and Trainer, Consultant***

Inspiring and creative, Bailie Hillman is truly making a difference in the lives of healthcare professionals and persons in senior living. Through her personal passion and hands-on work in various healthcare settings, Bailie is a tireless advocate for those working and living in senior care. She is living out her personal mission to help families and professionals better understand how to create an environment that builds on individuals' strengths and abilities, thereby allowing them to live life to its fullest. On a day-to-day basis, Bailie is putting into place new, powerful, and cutting-edge therapeutic approaches and programs that are changing the lives of persons living in senior care, their families, and members of

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their care-giving teams. Bailie received her master's degree in Occupational Therapy from Texas Woman's University. She is a licensed Nursing Home Administrator, a Certified Dementia Practitioner, and Certified Alzheimer's Disease and Dementia Care Trainer through NCCDP.



**Dana Walsh Sivak, Esq.**

***Senior Counsel, Falcon Rappaport & Berkman LLP***

Dana Walsh Sivak joined FRB in August 2022 as Senior Counsel in the firm's elder law, civil litigation, and cannabis law practice groups. Dana has devoted much of her legal career to addressing legal issues involving the elderly, including Article 81 guardianships, complex Medicaid eligibility issues, nursing home litigation, and advocating for increased access to quality-of-life initiatives for the elderly in long-term care settings. In her role as a Senior Associate at the elder law firm, and as head of the firm's Cannabis Compliance Practice Group, Dana also worked to expand access to medical cannabis to seniors, particularly those residing in nursing homes and assisted living facilities. She frequently lectures to health care facilities and at regional conferences about the medical benefits of cannabis in the elderly population, advocating for increased access to medical cannabis for all seniors, regardless of their socioeconomic status.



**Michael A. Curatola, Esq.**

***Associate, Falcon Rappaport & Berkman LLP***

Michael Curatola's legal practice focuses primarily on the purchase and sale of residential real estate. Michael has guided countless clients from contract to closing. He has also represented mortgage lenders and co-op boards in their real estate transactions. Michael often collaborates with other departments in the firm, including the corporate, estate planning, and taxation groups, working diligently to ensure each client's goals are met, even when doing

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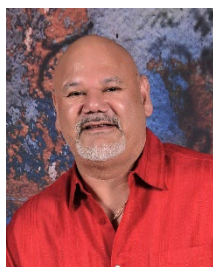
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so requires a multi-disciplinary approach. Michael is also committed to public service and pro bono work, having worked as a law student at the Exoneration Initiative, the Community Service Society of New York, and Brooklyn Law School's Community Development Clinic. He also spent a summer as a volunteer Court Navigator in Kings County Housing Court. In addition to real estate, Michael's legal interests include the practice and policy surrounding the cannabis industry, and emerging technologies such as cryptocurrencies, NFTs, and artificial intelligence.



**Harry J. Kelly**  
***Partner, Nixon Peabody***

Harry Kelly's practice focuses on transactional and litigation aspects of housing, fair housing, reasonable accommodations, and accessible design, government contracts, financial institutions, and bankruptcy law. He counsels owners of firms—particularly those active in real estate and housing—with respect to issues related to the operations of their businesses and assists them in litigation and enforcement matters. He also advises government contracts clients on transactional and regulatory issues and litigates claims against government agencies.



**Ruben Rivera-Jackman, MNPL**  
***Social Services Coordinator, Human Good***

Ruben Rivera-Jackman, MNPL, has an accomplished 25+-year career as a nonprofit leader with practical experience in, and solid understanding of, a diverse range of management, program development and service delivery applications. He has a passion for working with and advocating on behalf of older adults and a natural ability of providing instruction and training for adult learners. Mr. Rivera-Jackman served as a senior resident services manager at the King County Housing Authority in Washington from 2005 to 2017 and as director of resident services for Sustainable Housing for Ageless Generations from 2017 to 2019. Since September 2019, he has served as director of supportive services for Imagine Housing, a nonprofit organization in East King County which provides affordable housing options for

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older adults, families, and veterans. Mr. Rivera-Jackman is also a certified trainer with the National Resource Center on LGBT Aging, an adjunct professor at Seattle Central Community College and a two-time recipient of the AASC President's Award of Excellence.



**Gary Kirkman**

***Director of Compliance Training, US Housing Consultants***

Gary Kirkman joined US Housing Consultants with more than 17 years working in the affordable housing industry. Gary's experience includes hands-on experience as a regional property manager, an award winning community manager, a training director for a property management company, and a trainer covering multiple funding programs. In his years of experience as a trainer, he has developed a style which combines the right amount of entertainment and communication of often deeply complex information. Prior to becoming a compliance trainer, Gary was an award-winning Community Manager and was awarded Best Overall Compliance in Affordable Housing for the Southeast Region for a property management company portfolio. He conducts public and private trainings and speaks at housing conferences providing training on all major affordable housing programs.



**Melissa Harris**

***Director of Government Affairs, American Association of Service Coordinators***

Melissa Harris joined AASC in March 2018 with a decade of experience in journalism and communications. In her previous role as an Ohio Statehouse reporter, she closely monitored policies and politics with a focus on education and health. She has served as a board member of the Ohio Legislative Correspondents Association and her work has been recognized by the Society of Professional Journalists and Cleveland Press Club. Melissa holds a bachelor's degree in journalism from Kent State University. At AASC, she tracks public policies that impact members, advocates for positive

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policy outcomes, provides news updates and educates members on service coordination standards and practices.

### What You Need to Participate

This series will be hosted via Zoom Events. Zoom Events has different requirements than a standard Zoom Meeting or Webinar. Please take the following steps in advance to ensure that you will be ready to participate.

- Confirm you have a high-speed internet connection.
- Connect using a laptop or a desktop computer with speakers or headphones. Dial-in connections will not be available for this program.
- Create a free [Zoom Account](#) using your email address associated with this event if you do not already have one.
- Download [Zoom](#) if it is not already installed on your computer. If you already have Zoom, be sure you are running the [latest version](#).
- Sign into your Zoom client using the account associated with your registration email.

Access instructions will be emailed to you in the days prior to the start of the live program. Emails will be sent to the address used for registration and will come directly from Zoom at [no-reply@zoom.us](mailto:no-reply@zoom.us) and the sender's name will be FLTC/LeadingAge New York.

### Certificates of Attendance

Certificates of attendance will be awarded upon request via credit form and verification of the hours attended. Credit reports will be available on our website approximately 30 days following the program.

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

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### **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.

**QUESTIONS?** Contact us at 518.867.8383 or [edu@leadingageny.org](mailto:edu@leadingageny.org)

**Register Here:** <https://www.leadingageny.org/leading-u/2023-programs/housing-professionals/>