

Directions to:

Four Points by Sheraton Norwood
1125 Boston-Providence Turnpike
Route 1 (18 miles south of Boston)
Norwood, MA 02062

From Boston and points North

Take I-93 South which turns into I-95 (Route 128) North.

Take Exit 15B, Route 1 South toward Norwood. Travel 4.5 miles, the Four Points by Sheraton Norwood. Hotel & Conference Center will be on your right after the Staples Plaza.

From the West

Follow Mass. Turnpike (I-90) East

Take Exit 14 onto I-95 (Route 128) South.

(Note: From the West, this Exit is number 14, from the East, it is number 15.)

Continue South to Exit 15B. Route 1, Norwood, And proceed as above.

From Providence, TF Green Airport & points South

Take I-95 North to Exit 11B, Reponses Street, Norwood.

Drive 7/10 of a mile and turn left onto Dean Street.

At traffic light, turn left onto Route 1, heading South.

The Four Points by Sheraton Norwood Hotel & Conference Center is on your right after the Staples Plaza.

From Logan Airport

Exit airport, follow signs through Williams tunnel (toll) to I-90 /I-93 South. Follow signs for I-93 South about 7 miles.

I-93 South turns into I-95 (Route 128) North.

Proceed on I-95(Route 128) North to Exit 15B, Route 1 Norwood.

For more training information, visit our website at www.neahma.org

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NEAHMA
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neahma
NEW ENGLAND
AFFORDABLE HOUSING
MANAGEMENT ASSOCIATION

Preparing for Management and
Occupancy Review (MOR)
and
Industry Panel Discussion on
“Best Practices and Site Procedures
for MOR Prep.”

February 8, 2011

Four Points by Sheraton Norwood
1125 Boston-Providence Turnpike, Rte 1
Norwood, MA 02062

Presenters:

Debbie Piltch, Piltch Associates

Michelle Prunier, Maloney Properties

Doreen Donovan, Corcoran Jennison Mgt.

Maria Oymaian, WinnResidential

Liz More, Vesta Corporation

www.neahma.org

Program Overview

The first half of today's session will provide you with an overview of the elements of an annual Management and Occupancy Review inspection. The purpose of the MOR is to verify compliance of the property with applicable HUD Handbooks, HAP contract, Regulatory Agreement, Management Agreement, etc. This session will help you fully understand:

1. Timelines and Preparation when the letter arrives;
2. HUD Form 9834 - The Desk Review;
3. The On-Site, File Audit, EHEQ Limited Review; and
4. After the Review: Scoring, Monitoring, Response and Follow Up.

Attendees will also learn about HUD's new rating system that was released as part of the revised Chapter 6 of HUD Handbook 4350.1, touch upon the Rental Housing Integrity Improvements Project (RHIP) and its efforts to reduce errors, visa vie required written EIV Policies and Procedures, security regarding EIV and the extent to which you follow HUD requirements.

During the second half, a panel discussion group will review their individual company approach to preparation, documentation and checklists used to ensure compliance with the information needed by PBCA's/HUD in reviewing the property performance. Each of the panel members have worked in the New England area as well as other states and will discuss some of the various PBCA's focus on their reviews. The panelists will discuss the most commonly found MOR findings and how to prepare for your MOR to avoid findings related to missing documents, making sure you have the latest version of the forms.

Agenda

8:30 - 9:00 - Registration
(Continental Breakfast Included)

9:00 - 12:00 - Morning Session

MOR Overview

- Who does the MOR, why and when
- Seven major categories reviewed during MOR
- Tenant Files—criteria for the number of files selected for review—EIV

HUD Form 9834 (detailed review of form)

- Instructions
- Summary page
- Checklists and comment sections for 7 categories
- Addendum A: Tenant File Worksheet
- Addendum B: Checklist for On-Site Limited Monitoring and Section 504 Reviews

The MOR Resource Binder

Major Components of the MOR

- Notification
- Pre-MOR Desk Review
- The On-Site Review
- Communicating Results, the Response and Follow-Up Monitoring
- Overview of Ratings Criteria
- HUD files

12:00 - 1:00 Lunch Included

1:00 - 3:00 Afternoon Session

Panel Discussion:

- Best Practices for their Organization and sample checklists.
- Common findings from various PBCAs.
- Resource materials available to you on the web.

REGISTRATION FORM

Fax In Registration (781) 380-4842

Registration Deadline: February 2, 2011

MOR Training, Norwood, MA

February 8, 2011

Please complete a separate form for each registrant and fax registration. Mail a hard copy along with your payment to: NEAHMA, 400 Washington Street, Suite 210, Braintree, MA 02184

Online payment option available at www.neahma.org

Registration Fees:

_____ Member \$279 _____ Non Member \$349

Overnight Room Accommodations

Rooms are available on an individual basis under a NEAHMA Room Block at a discounted price of \$109 per night. Please contact the hotel directly to make your reservations by calling 781-769-7900.

Name: _____

Title: _____

Management Co: _____

Property Name: _____

Address: _____

City: _____ State: _____

Zip: _____

Phone: _____ Fax: _____

E-mail: _____

Cancellation Policy:

There is a \$50 administrative fee for cancellation 15 working days prior to the course. After this date, fees are *non-refundable*. A substitute may be sent in the place of the registrant. Class space is limited; therefore your registration must be accompanied by full payment in order to confirm your space for this course.

Outstanding Collection Policy:

Payment for trainings and workshops are payable upon receipt. Registrants with outstanding balances that exceed 90 days will be suspended from attending future trainings and workshops until payment is received in full. This organization complies with the Title III of the Americans with Disabilities Act (ADA). The site is accessible for individuals with disabilities and if a registrant requires special accommodations please contact the NEAHMA office at least ten days prior to the date of the course.