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FALL MEETING TOP ISSUES IN AFFORDABLE HOUSING

OCT 24TH -26TH, 2023

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AGENDA
AHMA Executive Directors and Presidents:
AHMA Operations and Administrative Issues

The Fairmont Hotel, Washington, DC
Tues., Oct. 24, 2023
8:30 – 9:25 am

AHMA Executive Directors and Presidents are invited to share/discuss issues of interest and concern related to the operation and administration of their AHMAs.

Potential topics for discussion include:

- * NAHMA's 2023-2028 Strategic Plan Update
- * NAHMA's membership promotion/incentive – Buy Some / Get Some, and how it relates to succession planning
- * Promoting the Communities of Quality program on AHMA Websites
- * Training topics – what's hot, what's not
- * Course and conference attendance trends and topic ideas
- * Marketing Success Stories
- * Membership trends
- * How do you foster healthy and productive Boards and committees?
- * Nitty-gritty behind-the-scenes topics – financial reporting options (accrual vs cash-based), databases, financial software, hotel contracts, meeting registration software, hosting fund-raisers, etc.
- * Other issues of operational/administrative interest and concern

Agenda
Welcome Session: NAHMA 101
Fairmont Hotel
Tuesday, Oct. 24, 2023
9:30-10:30 a.m.

The session provides an overview of NAHMA, including a meet-and-greet with attendees. The Membership and Marketing Committee chair, Gianna Richards, and vice chair, Melissa Fish-Crane, serve as moderators.

1. Welcome and Ice Breaker – Gianna Richards and Melissa Fish-Crane
2. Overview of NAHMA – Larry Sisson
 - a. Mission
 - b. Committees
 - c. How To Get Involved
3. Relationship Between NAHMA and the AHMAs – Kris Cook
4. NAHMA Educational Foundation – Alicia Stoermer Clark
5. What To Expect During the NAHMA Meeting – Gianna Richards and Melissa Fish-Crane
6. Adjournment



**Combined Meeting of
NAHMA Certification Review Board
&
NAHMA Education & Training Committee
Tues. Oct 24th, 2023, 10:30am-11:15am**

AGENDA

1. Welcome Anne Sackrison, Chair of E&T (Chairing meeting)
Sonja Horn, Vice Chair of E&T
Eileen Wirth, Chair of CRB
Anthony Sandoval, Vice Chair of CRB
2. Chair of CRB, Eileen Wirth to capture minutes.
3. Approval of minutes from March Meeting, 2023
4. **Old Business:**
 - a) **Credential Statistics**
Renewal Updates: March 23- : (Updated numbers reviewed at conference)
NAHP Renewals to date: 441 Billed/ Renewed
 - **NAHP-e Renewals** to date: 463 Billed/ Renewed
 - **NAHMT/NAHMS Renewals** to date: 170 Billed/ Renewed
 - **CGPM Renewals** to date: 439 Billed/ Renewed
 - **CPO Renewals** to date: 2,945 Billed/ Renewed
 - **BCD Renewals** to date: 125 Billed/ Renewed
 - **CPO Course Updates: March 23-:** (Pass: /Fail:)
 - **FHC Course Updates: March 23-:** (Pass: /Fail:)
 - **SHCM Program Updates: Billed in 2023 2,988- March 23-:** (Pass: /Fail:)
 - b) FHC 2024 Renewal Update
 - c) AHMA Procedure Taskforce: Progress Update
 - d) Strategic Planning Activities: Renewal Procedure Video, Certification Procedure Video
5. **New Business:**
 - a) CPO Course update
 - b) Trainer Update
 - c) AHMA Communication
 - d) Website Updates
 - e) CRB: NAHP and Maintenance Application Update/Review

Adjournment

Agenda
Membership and Marketing Committee Meeting
Fairmont Hotel
Tuesday, Oct. 24, 2023
11:15 a.m.-12:15 p.m.

The Membership and Marketing Committee is responsible for recommending policies and procedures related to NAHMA memberships and for implementation, oversight, and review of the association's overall marketing initiatives. The Membership Committee must be chaired by an Executive level member per NAHMA's bylaws.

1. Welcome: Chair Gianna Richards and Vice Chair Melissa Fish Crane; vice chair to take minutes.
2. Ask new members, first-time attendees and sponsors to introduce themselves.
3. Review and approve the March 2023 committee meeting minutes.
4. Old Business/Miscellaneous Program Updates and Discussion
 - a. 2024 Calendar Sales.
 - b. Recruitment Campaign of Nonmembers on NAHMA's Affordable 100 List-this recruitment initiative takes place each June/July. We use the A100 contact list as a recruitment list.
 - c. New Member Recruitment ongoing new member activities. We have had a couple of new members come in since we published the new member memo.
 - d. Member Recruitment with syndicators initiative.
 - e. Buy Some Get Some continues to be a program we talk about and actively try to promote. AHMAs and Affiliates have also been given this opportunity based on number of AHMA reps, and/or if there are more than one member from an affiliate company. We promote this initiative quarterly, and this spring I will be making phone calls instead of sending emails to the companies that are currently eligible that are not taken advantage of the program.
5. Open Discussion/New Business: Think tank/members contribute recruitment ideas.
6. Adjournment

NAHMA Membership and Marketing Committee Meeting

Fairmont Hotel

Wednesday, March 8, 2023

Welcome:

Chair Gianna Richards called the meeting to order at 11:30am and welcomed attendees. New members and first-time attendees introduced themselves.

Review and approval of October 22 minutes:

Peter Lewis made a motion to approve the October 22, 2022 minutes, seconded by Alicia Clark. Minutes were approved unanimously.

Old Business/Miscellaneous Program Updates and Discussion:

- a. 2023 Calendar sales – over 53,000 calendars sold this year. Thanks were given to everyone as this is NAHMA's largest non-dues revenue.
- b. Recruitment Campaign of non-members on NAHMA's Affordable 100 list – It was discussed the importance for companies to provide this information. NAHMA represents 75% of the affordable housing industry and the list is used for advocacy when the organization is trying to lobby different topics. Nathan Burnett thanked Amber Day for setting this up.
- c. Restructure of Welcome Session NAHMA 101 recap – The NAHMA 101 session had a great turn out. We gave new members an overview who NAHMA is, the relationship between NAHMA and the AHMA's and what to expect during the conference.
- d. New member recruitment – Recruitment tools discussed i.e. LinkedIn, the conference is a big draw.
- e. Buy Some Get Some update – We have seen one more company take advantage of this program. To date we have ___ companies in the program. This program is being marketed quarterly.
- f. Communities of Quality taskforce update – Kris Cook updated COQ process. This is an important program, a hallmark of NAHMA. The criteria are on the NAHMA website.

Open Discussion/New Business:

Post challenge – Gianna and Melissa challenged members with a #NAHMA2023 post challenge. Whoever did the most posts on social media would receive \$100.

Adjournment:

There being no further business, Gianna adjourned the meeting at 11:50 a.m..

Respectfully submitted, Melissa Fish-Crane, Vice Chair



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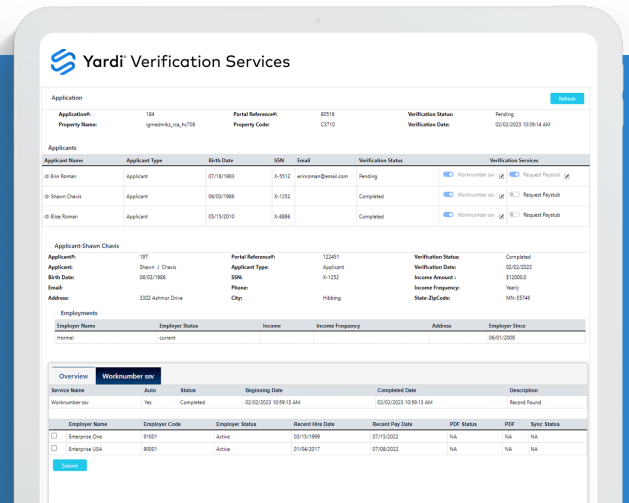
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AGENDA
AHMA Liaisons and Executive Directors Meeting
Fairmont Hotel, Washington, DC
Tuesday, Oct 24, 2023
12:15pm-1:30pm
(Working lunch)

12:15-12:45– Lunch buffet

12:45 – Meeting Begins

- A.** Welcome – Peter Lewis, Incoming Chair of the Board
Special Thank you to our Meeting Sponsors, and a word from our sponsor!



- B.** Introductions of Participants
Participants introduce themselves around the table and share comments on their AHMA's success stories and challenges in 2023.
- C.** Update by NAHMA Educational Foundation Board Members
- A word from the NAHMA EF chairs, Alicia Stoermer Clark, Anthony Sandoval
 - 2023 gala event update at The Hamilton in Oct 2023
- C.** Miscellaneous Reminders:
- AHMA Reg-Leg Fund – friendly reminder- please continue to support.
 - NAHMA 2024 Calendar sales to date/Lucky Draw contest
- E.** Old Business
- F.** New Business
- G.** Adjournment

AGENDA

Joint Federal and Regulatory Affairs Policy Meeting
Fairmont Hotel, Washington, D.C.
Tuesday, Oct. 24, 2023
1:30-2:45 p.m.

1. Welcome – Larry Keys, Vice President of Government Affairs
2. New Committee Business:
 - Federal Affairs Committee Issues - **Michelle Norris**, Federal Affairs Committee Chair
 - Regulatory Affairs Committee Issues - **Noel Gill**, Regulatory Affairs Committee Chair
 - Rural Issues – **Babbie Jaco**, Rural Housing Committee Chair
 - Fair Housing Issues – **Jonathan Gershen**, Fair Housing Committee Chair
 - Senior Housing Issues – **Alicia Khasky**, Senior Housing Committee Chair
 - Tax Credit Committee Issues – **Jennifer Wood**, Tax Credit Committee Chair
 - Other Emerging Issues
3. Adjourn, 2:45 p.m.

Session Agenda
NAHMA October 2023 Meeting
The Fairmont Washington, Washington, DC
Tues., Oct. 24, 2023
2:50 – 4:00 pm

Fraud Alert! A Multifamily Management Panel on Fraud

A panel of NAHMA members will discuss challenges and strategies related to employee and resident fraud in multifamily management, including employee theft, renter fraud, identify theft, and fraudulent documentation. The panel will highlight firsthand experience in identifying, mitigating, and preventing fraud in our industry. Best practices will be discussed on key identifiers and policy/practice adjustments to avoid future exposure to fraud. Discussion items include bank fraud, document fraud (including application and verifications), and identifying fraudulent documents such as pay statements.

Panelists:

Alicia Clark, Chief Executive Officer, Seldin LLC

Heather Wezensky, Senior Vice President of Compliance, Seldin Company

Amy Albery, Chief Executive Officer, Wallick Communities

Jasmine Borrego, President, TELACU Residential Management, Inc.

AGENDA
NAHMA Executive Council Meeting
The Fairmont Washington, Washington, DC
Tues., Oct. 24, 2023
4:00 – 4:30 pm

1. Welcome and Chair of the Board Report – Larry Sisson, Chair of the Board
2. Approval of Minutes from October 2022 Meeting, Melissa Fish-Crane, Secretary
3. Financial Report – Noel Gill, Treasurer
-- Review and Approval of FY 2024 Budget
4. Election for NAHMA Officers and Board of Directors – Michael Simmons,
NAHMA Past President
5. New Business
6. Old Business
7. Adjournment

AGENDA
NAHMA Budget and Finance Committee
The Fairmont Washington, Washington, DC
Tues., Oct. 24, 2023
4:30 – 5:00 pm

1. Welcome – Noel Gill, Treasurer
2. Review of Latest 2023 Financial Statement
3. Review of Dashboard Report for Year-to-Date 2023
4. (FY 2024 NAHMA Budget Approved by Committee on Zoom call, Aug. 10, 2023)
5. New Business
6. Old Business
7. Adjourn

Minutes
NAHMA Budget and Finance Committee
The Fairmont Hotel, Washington, DC
March 8, 2023
3:30 – 4:00 pm

The meeting was called to order by Noel Gill, NAHMA Treasurer and Chair of the Budget & Finance Committee.

1. Review of Year-End Unaudited Statement for FY 2022:

We are showing a net loss of about \$142k which was projected. As previously reported to the board since last spring, we've had a downturn in advertising and sponsorship sales with three major endorsement/sponsorship programs from HD Supply/USI Insurance and Buyers Access not renewing their agreements. The losses represent about \$70k or about half.

Our Executive I membership came in at budget, but there was a reduction with the multiple executive memberships (Executive II & III) as well as our associate and affiliates. The highest loss at \$11k came from the AHMA subscriber dues as a result from the challenges of holding meetings during the pandemic.

SHCM renewals were down, and this is the first time we've experienced a loss vs budget for this certification and we'll work to market the value in 2023. SHCM loss in revenue of \$52k was somewhat offset by the savings in expense of \$45k; we didn't have to pay rebates to our SHCM program partner NAA ED Institute for renewal revenue not received.

The other negative revenue is a result of meeting attendance as we continue to recover from the pandemic and travel had not returned to normal and calendar sales being off budget by roughly \$13k.

On the expense side, overall, we were able to control expenses well and balance some variances in over/under budget categories and ended with an \$11k total expense savings vs budget.

2. Review of Dashboard Report for Unaudited Year-End 2022

We reviewed the dashboard KPI's. The three largest variance is membership revenue, advertising/sponsorship and the SHCM exams/renewals as discussed in the financials.

3. Brief Review of the most recent FY 2023 Financial Statement – nothing to report.

4. Update: FY 2022 Audit and Tax Filing Activities – this is in process

5. New Business

A request from NAHMA staff have asked the Budget and Finance Committee to reopen the FY 2023 budget to consider increasing the registration fee for our conference to cover our costs to break even, beginning with the October 2023 meeting. Currently, we average a loss of about \$30,000 per meeting – or \$60,000 per year. NAHMA staff would develop the new registration cost based on two data points – first, a projection on what it would take to break-even given the contract with the Fairmont and AV company, and second, to review other industry conferences to ensure we weren't pricing ourselves beyond the competition.

A motion was made for the NAHMA staff to review relevant data and propose an increase to the October meeting registration fees with the goal of breaking even for the meeting revenue-wise. Staff should bring the proposed increase to the Budget and Finance Committee for review before the end of June. All members were in favor of this.

6. Old Business – None

7. Meeting adjourned at 5 p.m.

Minutes submitted by Melissa Fish-Crane, Secretary

Agenda
Affiliates Committee Meeting
Fairmont Hotel
Oct. 24, 2023
4:30-5 p.m.

The NAHMA Affiliates Committee is comprised of NAHMA members that provide services to affordable property management professionals. It is the mission of this group to support the NAHMA organization while providing our affiliates members a forum to discuss and implement activities that benefit all NAHMA's members.

1. Welcome —Chair, Amber Day Vice Chair, Nathan Burnett
2. Vice Chair To Take Minutes
3. Approval of March Minutes
4. Affordable 100 Update
5. Old Business
 - a) Breakfast Presentation
 - b) Educational Foundation Gala for October 2023
6. New Business
 - a) March 2024 Panel Suggestions/Discussion
 - b) Bimonthly Committee Call Schedule
 - c) NAHMA Strategic Planning Items
 - d) NAHMA EF Gala Sponsor Benefits
7. Adjourn

NAHMA Affiliates Committee Meeting: Spring
Fairmont Hotel, DC
Wednesday March 8th, 2023
3:30-4:15pm

Chair: Amber Day; **Vice Chair:** Nathan Burnett

Staff Liaisons: Brenda Moser and Jennifer Jones in attendance

The meeting was called to order by Amber Day at 3:30pm

- Amber gave recognition and introductions of first-time attendees.

- Approval of last meeting's minutes
-approved
- Affordable 100 update
-Nathan updated the group on mission, progress, challenges, and final push for submissions. Mark agreed to help with unit data still needed. Might be a challenge to fill in all missing information in time for final submission to Jennifer.
- Old business
-Recap, education, and key speakers around previous Affiliate Breakfast Panel.
-Discussion and Education of past Educational Foundation Gala.
-Stephanie gave an update on the upcoming Ed Foundation Gala at the Hamilton in October. Call to action on awareness, participation, and promotion. Items needed from sponsorships, auction, donations.
- New Business
-Discussion of October Meeting Panel Ideas
-Anthony and recent member survey confirmed all things Insurance is a desired topic and of interest.
-Locate insurance speakers and all related topics for panel. Cyber security was presented as an idea that also checks the "tech" box members are interested in. Risk management was also suggested as a complement to the topic.
-It was a noted suggestion to ask membership to submit questions of critical issues around this topic and possibly a survey leading up to conference.
-Use the recent membership survey to guide future topics as well.
-Other topics brought up in discussion were best practices in development of new business as a manager agent as well as challenge owners to conduct internal audit from vendors of what works well and doesn't. Contract review updates.
-Jeffrey reinforced the commission mission to encourage future topics.
-Scott confirmed that Kmarts do still exist.
- Recognition of past Affiliate Chairs present.
- Motion to adjourn
-approved, meeting adjourned.

**NAHMA Educational Foundation
Board of Directors In-person Meeting
The Fairmont Hotel/Washington DC
Tues. Oct. 24, 2023
5:00-6:30pm**

1. Welcome – Alicia Clark, Chair; Anthony Sandoval, Vice Chair
2. Recognition of new officers
3. Thank you to outgoing board members/Welcome to Incoming
4. Old Business:
 - **Subcommittee of Fundraising specific to Gala Chair, Stefanie** Members of subcommittee: Lisa T., Brenda, Carlita, Amber, Alice
 - **Communications & Marketing- Chair, Amber** Members of subcommittee: Stefanie, Alice, Rue; non-board member: Maxx Hofmann (NAHMA Member)
 - **AHMA/NAHMA Member participation – Chair, Megan** Members of subcommittee: Anthony, Diane, Peter
 - **Fundraising Committee** –Alicia, Anthony
Primary Members of Committee: Alicia, Anthony, Brenda
Secondary: ALL BOARD MEMBERS
 - **Scholarship Management- Chair, Bruce, Alicia** Members of subcommittee: Alicia, Lisa M, Lisa T, Greg, Carlita, Chris, Nancy
5. New Business
6. Adjournment

Minutes
NAHMA Education Foundation
NAHMA Spring Meeting, Fairmont Hotel, Washington, DC
March 8, 2023, 4:30 pm

Board Liaison:

Staff Liaison: Brenda Moser, Kris Cook

Foundation Board Members in Attendance:

Alicia Clark, Diane Smith, Megan Davidson, Anthony Sandoval, Lisa Tunick, Stefanie Lee, Amber Day, Alice Fletcher, Greg Proctor, Justin Ackerman, Lisa McCarroll, Peter Lewis, Rue Fox, Maxx Hoffman

Foundation Scholarship Admin: Dr. Bruce Johnson

Guests: Anne Sackrison, Isa Woods, Tim Braunscheidel, Cindy Lamb, Marguerite D'Angelo, Brandon Moss, NAHMA scholar: Ashley-Maacah Muflam, Barry Weaver, Gustavo Sapiurka, Mark Livanic, Barry Weaver, Melody Lundy, and Scott Ployer

NAHMA Staff: Brenda Moser, Kris Cook

Alicia Clark, Chair, opened the meeting at 4:37 pm and welcomed all to Washington.

Old Business:

Committee Reports:

Scholarship Management (Chair – Bruce Johnson)

Bruce previewed the 2022 annual report, which will eventually be posted on the NAHMA website. The Foundation gave 96 scholarships last year. 28 NAHMA scholars graduated in December 2022 or will graduate in May 2023. The theme of the Annual Report is showing the graduation of NAHMA scholars – the graduation rate of NAHMA scholars is 43%. Bruce thanked everyone for their support this past year.

The application window opened and there are currently 80 applications pending. We plan to give \$3,500 awards again this year. We have a very high hit rate for our scholarship and last year everyone was awarded. We should be advertising this!

The NAHMA Educational Foundation is well under the national average for the percentage of operating expenses to income. Only 8% of the Educational Foundation income is used for operating expenses. The national overage is over 30%.

Board members were encouraged to use the Annual Report when fundraising.

Fundraising - Gala (Chair – Stefanie Lee)

The venue for the Gala and the band has been secured. Stephanie has been meeting with the affiliates and encouraging them to sponsor the Gala. Shortly she'll be working on auction items.

Communication and Marketing (Chair – Amber)

Amber created a sticker with a QR code linked to the GiveSmart platform and asked every board member and guest to put a sticker on their name tag to encourage giving during the spring meetings.

We will continue to use the GiveSmart platform to control fundraising. Amber created a new website for the foundation, linked from the GiveSmart platform. She reviewed the new website with the board and created a "board members only" webpage with links to the google docs, meeting agendas, notes, and annual reports.

Amber will send an email to all members with a link to the new website.

Fundraising (Co-Chairs - Alicia & Anthony)

At breakfast tomorrow, Alicia asked everyone to sit throughout the room to promote giving during breakfast. Our goal is to raise enough for one scholarship with the QR code.

It was suggested that we share the QR code with the AHMAs so that they can share with their members at their in-person meetings/conferences.

It was suggested that we clean up the donor list from previous years. It was also recommended that we send donation requests to those companies on the Top 100 lists for developers and managers.

AHMA/NAHMA member participation (Chair - Megan)

Meghan stated that the goal of this committee is to communicate how grateful we are to the AHMAs for their participation – they bring us applicants and donations. She emphasized the importance of personally thanking all donors and the AHMAs. She sent handwritten thank you notes to all AHMAs.

It was recommended that we share the annual report in our thank yous and point out that the AHMA participation is highlighted in the annual report. Emphasize that last year, 100% of full applications were awarded. Anthony suggested when reaching out to the AHMAs, we should focus on getting applicants from states not funded before.

Bruce recommended that the flyer for next year should mention the graduation rate of our scholars and the percentage of applications awarded. Perhaps we should mention the amount of the scholarship as Bruce has applicants asking how much the awards are.

New Business / Other:

Scott Ployer suggested that we can all show our support of the Foundation by advertising it on our websites. Amber will send us all a Foundation logo with a link to share with our donors and on our websites.

Amber reminded everyone to follow the Educational Foundation on all social media outlets and to repost messages from the Foundation. This broadens our reach.

Adjournment

There being no other business, the meeting was adjourned at 5:28 pm.

These minutes are submitted by Diane Smith on March 18, 2023.



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**Wednesday, Oct. 25th
8:30 – 9:35 am**

Affiliate Breakfast Panel Presents:
***“The Insurance Hurricane: How to
Weather the Storm”***

Panelists:

Megan Davidson

First Vice President, Alliant Insurance Services, Inc.

megan.davidson@alliant.com

Maxx Hofmann

Vice President, Business Development Executive, Conner Strong
Buckelew

mhofmann@connerstrong.com

Eddie Garrett

Vice President / Risk & Insurance Advisor

McGriff National Real Estate and Hospitality Practice

EGarrett@mcgriff.com

Opening General Session
NAHMA October 2023 Meeting
The Fairmont Washington, Washington, DC
Wed., Oct. 25, 2023
9:45 – 10:30 am



***Keynote Speaker: David M. Dworkin, President/CEO,
National Housing Conference***

David M. Dworkin is the 17th president and chief executive officer of the National Housing Conference, the nation's oldest housing coalition, founded in 1931. Prior to joining NHC in 2018, Mr. Dworkin was a senior policy adviser at the U.S. Department of the Treasury, where he advised Treasury Department officials on matters related to housing and community development. He also served as a member of President Barack Obama's Detroit interagency team, where his responsibilities included developing and implementing strategies to assist in the City of Detroit's revitalization.

Previously, he managed the Capital Magnet Fund (CMF) at the Treasury Department's CDFI Fund, which disbursed \$80 million in grants for economic revitalization and community development through investment in and assistance to community development financial institutions (CDFIs) and nonprofit housing organizations.

Prior to joining the Treasury Department, he was CEO and Founder of Affiniti Strategies, a political consulting firm that assisted clients in building political relationship capital. Mr. Dworkin served in a number of leadership positions at Fannie Mae. His service in the administration of President George H.W. Bush included the State Department's acting deputy assistant secretary for legislative affairs. As National Security Advisor to Rep. Rod Chandler of Washington, he was recognized by Secretary of State James A. Baker III for his key role in the negotiation of the Bipartisan Accord on Central America, which led to the end of Nicaragua's civil war and inauguration of its first democratically elected government.

Mr. Dworkin was a freelance foreign correspondent and photographer for The Detroit News, where he covered the war in Afghanistan. In 1984, he was the first Western journalist to cross the Safed Koh mountain range with the rebels fighting in the region known as Tora Bora.

He is a graduate of the University of Michigan and lives in Washington, D.C. with his wife Hayley Hoffman.

AGENDA

**HUD Multifamily Leadership Panel
The Fairmont Hotel
Wednesday, Oct. 25, 2023
10:45 a.m.-Noon**

Welcome to a Panel discussion with leadership from HUD Office of Multifamily Housing. We look forward to hearing their policy updates and forthcoming priorities that affect the management of multifamily housing properties and rental assistance programs. After our panelists provide their remarks, we will have a Q & A.

1. **Welcome** – Moderator
 - **Larry Keys**, NAHMA Vice President of Government Affairs
2. **Multifamily Housing Leadership Discussion**
 - **Ethan Handelman**, Deputy Assistant Secretary for Multifamily Housing, HUD
 - **Jen Larson**, Director of the Office of Multifamily Asset Management and Portfolio Oversight (OAMPO), HUD
3. Q&A session with the audience
4. Adjourn, Noon

NAHMATM

NATIONAL AFFORDABLE HOUSING MANAGEMENT ASSOCIATION

NAHMA VANGUARD AWARD LUNCHEON

Special thanks to our Sponsors



Agenda
Vanguard Awards Luncheon & Panel Discussion
Fairmont Hotel
Wednesday, Oct. 25, 2023
12:15-1:15 a.m.

Honors winners of the 2023 Vanguard Awards, including a panel discussion with a representative from each of the prizewinning properties, who will share the challenges and successes in developing and rehabbing an award-winning property.

1. Luncheon
2. Awards Presentation
3. Panel Discussion moderated by Larry Sisson, NAHMA chair of the board and president of TESCO Properties Inc., and representative from the winners:

Vanguard Award for New Construction

**Small Property (less than 100 units)*

Avalon Villas, Phoenix, Ariz.

Management Company: Celtic Property Management LLC

Owner: Atlantic Development & Investments Inc., Scottsdale, Ariz.

Panel Representative: Jessica Breen Raymond, executive vice president, Atlantic Development & Investment Inc.

**Large Property (more than 100 units)*

425 Grand Concourse, Bronx, N.Y.

Management Company: Trinity Management LLC

Owner: Trinity Financial and MBD Community Housing, both in New York, N.Y.

Panel Representative: Maribel C. Batista, executive vice president, Trinity Management LLC

Vanguard Award for Major Rehabilitation of an Existing Rental Housing Community

St Mary Manor, Jackson, Tenn.

Management Company: Wesley Living; Owner

St Mary Manor LLLP, Cordova, Tenn.

Panel Representative: Ron Budynas, vice president & chief operating officer, Wesley Living

Vanguard Award for Major Rehabilitation of a Nonhousing Structure

Buena Esperanza, Anaheim, Calif.

Management Company: John Stewart Company

Owner: Jamboree Housing Corporation, Irvine, Calif.

Panel Representative: Laura Archuleta, president & CEO, Jamboree Housing Corporation

Vanguard Award for Major Rehabilitation of a Historic Structure into Affordable Rental Housing

The Willows at East Greenville, East Greenville, Penn.

Management Company: Ingerman

Owner: Ingerman, Collingswood, N.J.

Panel Representative: David DeAugustine, chief operating officer, The Ingerman Group

Session Agenda
NAHMA October 2023 Meeting
The Fairmont Washington, Washington, DC
Wed., Oct. 25, 2023
1:40 – 2:40 pm

2023 Compensation and Benefits Survey Highlights – What's Changed in the Last Year and Where are Trends Pointing for 2024?

Presented by: Jon Boba, managing director at Pearl Meyer



Jon Boba is a managing director at Pearl Meyer. Over his nearly 30 years in real estate consulting, he has completed more than 1,000 engagements representing a wide range of firms in the real estate and financial service industries. He also has developed an industry specialization in health care/seniors housing as well as affordable housing, where he is a recognized leader, respected conference speaker, and author of several published articles.

Jon is responsible for managing client relationships, business development, and executive/board-level consulting work. This includes management consulting, succession planning, "right-sizing," talent assessment, and professional development programs, helping firms attract, retain, and develop future leaders. He is a licensed attorney in the state of Illinois and a member of the American Seniors Housing Association and the National Affordable Housing Management Association.

Session Agenda
NAHMA October 2023 Meeting
The Fairmont Washington, Washington, DC
Wed., Oct. 25, 2023
2:50 – 3:50 pm

***Trauma-Informed Housing – A Toolkit for Advancing Equity
and Economic Opportunity in Affordable Housing***

Panelists:

Aaron Gornstein, President and CEO, Preservation of Affordable Housing (POAH)
Julianna Stuart-Lomax, Vice President of Community Impact, POAH

About Trauma-Informed Housing:

Trauma is a pervasive health concern in the U.S. – more than two-thirds of children experience one form of childhood trauma by the age of 16. That number increases when you include experiences of racism or discrimination. Trauma, when left unaddressed, can impact our physical health and disrupt everyday skills like solving problems, managing priorities, or building relationships.

Historically and nobly, affordable housing providers have been focused on the creation and preservation of units. This is essential. The U.S. has a deficit of 7 million homes, with the greatest supply shortage at low-income price points. Moreover, only 1 in 4 households eligible for housing assistance receives it.

But the US affordable housing system is subject to a complex web of rules and regulations that often forces housing providers to prioritize regulatory compliance over the wellbeing of residents, frontline staff and communities. Instead of breaking the cycle of trauma, mission-driven affordable housing providers are often constrained by a system whose rules, policies and norms can trigger or even perpetuate, the very problems they are trying to solve.

Trauma-Informed Housing is a model developed by POAH that combines two complementary frameworks: human-centered design and trauma-informed care. At their core, both approaches prioritize people.

At POAH, we believe this approach strengthens our mission: to preserve, create and sustain affordable, healthy homes that support economic security, racial equity and access to opportunity for all. We believe trauma-informed housing is a better way to get there.

This approach isn't just good for the residents who ultimately use or benefit from affordable rental housing. It's also good business. If we invest in solutions that are not targeting root causes or design spaces that don't function well for the people who use them, we'll continue to spend money, time and other scarce resources on band-aid solutions that don't actually address the problem.

We hope this toolkit inspires other mission-driven housing owners, and those who invest or regulate them, to commit to becoming trauma-informed. And in turn, to invest in projects, programs and organizations that are trauma-informed.



**FALL MEETING
TOP ISSUES IN AFFORDABLE
HOUSING**

Special Thanks to our Snacks Sponsor!



AGENDA

Rural Housing Panel Wednesday, October 25, 2023 4-5 p.m.

1. Welcome
 - **Larry Keys**, Vice President of Government Affairs, NAHMA
2. Panel discussion with leading experts on rural affordable housing programs, including recent guidance and upcoming policy priorities from USDA-Rural Housing Service (RHS)
 - **Karissa Stiers**, Assistant Deputy Administrator, Multifamily Housing, USDA-RHS
3. Q & A
4. Adjourn, 5 p.m.

AGENDA
NAHMA Board of Directors Meeting
The Fairmont Hotel, Washington, DC
Wed., Oct. 25, 2023
5:00 – 6:00 pm

1. Welcome, Introductions and Chair's Remarks – Larry Sisson, Chair
2. Approval of Minutes from March 2023 in-person meeting – Melissa Fish-Crane,
NAHMA Secretary
3. Welcome of newly elected NAHMA Board members and Thank you
to Outgoing Board Members – Larry Sisson, Chair
4. Financial Report – Noel Gill, Treasurer and Chair of Budget & Finance Committee
 - A. Review of Latest 2023 Financial Statement
 - B. Review of Dashboard Report for YTD 2023
 - C. (FY 2024 NAHMA budget already approved by Board on Sept. 21, 2023)
5. **Discussion:** NAHMA's 2023-2028 Strategic Planning Implementation Efforts
6. **Update:** Next NAHMA Emerging Leaders Learning Series (NELLS) program and
new "mid-level staff" pilot program
7. **Public Policy Discussion** – Issues to Bring Forward from Joint Policy Committee
Meeting (Larry Keys and Chairs)
8. NAHMA Educational Foundation Report (Alicia Clark, Chair, or Peter Lewis,
NAHMA Board representative to Foundation Board)
9. CEO Report (Kris Cook)
10. New Business
11. Old Business
12. Adjourn

Minutes
NAHMA Board of Directors Meeting
The Fairmont Washington, Washington, DC
March 9, 2023, 5:15 – 6:15pm

Board Members: Chair – Larry Sisson, Peter Lewis, Sandra Cipollone, Jasmine Borrego, Sonya Brown, Noel Gill, Cindy Lamb, Angie Waller, John Kuppens, Alice Fletcher, Christina Sanchez, Michael Simmons and Janel Ganim

Past Presidents, Voting: Gianna Richards, Michael Johnson

Past Presidents, Non-Voting: Phil Carroll, Jim McGrath

Guests: Gwen Volk, Mark Livanec

Staff: Kris Cook, CAE; Larry Keys, Jr.

NAHMA President Larry Sisson called the meeting to order at 5:15pm.

Minutes from the October 2022 meeting were approved.

Larry Sisson, Chair of the Board, welcomed NAHMA Officers and Board Members.

Financial Report

12.31.2022 loss of 142K unaudited; downturn in advertising and sponsorships not renewing agreements which represent approx. \$70k of the loss; Executive I membership came in on budget, had a reduction in multiple executive memberships (Executive II & III). January 2023 financials ok in first month. Working on 2022 Audit. Motion approved to review October 2023 meeting registration fees and do a breakeven analysis.

Strategic Plan

Motion approved to accept as written draft language for mission statement. Review Strategic Plan for 2023 to 2028 comments due to Kris Cook by March 31, 2023. Committee members to be included during April Board call to finalize the plan.

Update – Larry Keys - Housing survey has slowed down due to other initiatives taking priority.

Update – NELLs – piloting a mid level staff program. Senior level program will stay.

Public Policy Update Larry Keys – President’s Budget request, NSPIRE, HOTMA, VAWA – navigating implementation. Motion approved to support NAHMA submitting comments to the White House Resident-Centered Housing Challenge.

NAHMA Educational Foundation 96 scholarships awarded in 2022 -- \$3,500 per scholarship. 85% students of diversity. Over the life of the program over 40% graduation rate. Navigate promoting contest with \$100 gift card for AHMA Affiliated properties in states it operates in. (Alabama, Virginia, Connecticut and Mississippi. October event at The Hamilton. Big push to get more applications before the deadline of May 12, 2023. QR code distributed.

CEO Report Kris Cook reported renewals are out for credentials and membership. Working on 2022 year end tax filing. Hotel room block was sold out for this meeting.

No new or old business. Meeting adjourned at 6:02pm.

Minutes submitted by Peter Lewis on behalf of Melissa Fish-Crane, Secretary.



SOUNDTRACK TO SCHOLARSHIPS

Event Details

Wednesday, October 25th @
6:30pm

YOU MUST HAVE A SEPARATE TICKET
FOR THIS EVENT



Location :

The Hamilton
600 14TH STREET N.W.
WASHINGTON, DC 20005

*Come in the entrance on F
Street (left side of building)
Go downstairs

*Cocktail
attire
encouraged*



NAHMA
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**FALL MEETING
TOP ISSUES IN AFFORDABLE
HOUSING**

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AGENDA

Tax Credit Panel Discussion Thursday, October 26, 2023 9-10 a.m.

1. Welcome – Moderator
 - **Larry Keys**, NAHMA Vice President of Government Affairs
2. Panel discussion with leading experts on the Low-Income Housing Tax Credit (LIHTC) with key policy updates.
 - **Jennifer Schwartz**, Director of Tax and Housing Advocacy at the National Council of State Housing Agencies (NCSHA)
3. Q&A with audience interaction (10 – 15 minutes)
4. Adjourn

AGENDA

HUD's Green and Resilient Retrofit Program (GRRP)

Thursday, Oct. 26, 2023

10:10-11:10 a.m.

1. Welcome – Moderator
 - **Larry Keys**, NAHMA Vice President of Government Affairs
2. This session covers the Green and Resilient Retrofit Program (GRRP). As part of the Inflation Reduction Act of 2022, Congress allocated \$837.5 million in grant funding and \$4 billion loan authority for GRRP. GRRP is designed to improve the lives of HUD-assisted residents by providing funding to owners of HUD Multifamily-assisted properties to rehabilitate properties to reduce carbon emissions, promote utility efficiency and energy generation, and improve indoor air quality and climate resilience.
 - **Tom Davis**, Director, Office of Recapitalization (“Recap”), HUD
3. Q&A with audience interaction
4. Adjourn, 11:10 a.m.

AGENDA

**REAC/NSPIRE Forum
The Fairmont Hotel
Thursday, October. 26, 2023
11:15 a.m.-12:30 p.m.**

1. Welcome – **Larry Keys**, Moderator, NAHMA

Welcome to a Panel discussion with leadership from HUD's Real Estate Assessment Center (REAC). We look forward to hearing their policy updates and forthcoming policy priorities, including NSPIRE, that affect the management of multifamily housing properties. After our panelists provide their remarks, we will have a Q & A.

2. REAC Leadership Discussion
 - **Ashley (Ash) Sheriff**, Deputy Assistant Secretary for REAC
3. Q&A session with the audience
4. Adjourn, 12:30 p.m.



NAHMA Antitrust Compliance Policy

*Based on a model policy prepared by Jeffrey S. Tenenbaum, Esq.
Venable, Baetjer, Howard & Civiletti, LLP, Washington, D.C.*

The antitrust laws of the United States and the various states prohibit agreements, combinations and conspiracies in restraint of trade. Because the National Affordable Management Association (NAHMA) and other trade and professional associations are, by definition, combinations of competitors, one element of a possible antitrust violation is generally present, and only some action by the association that unreasonably restrains trade generally needs to occur for there to be an antitrust violation. Consequently, associations are common targets of antitrust plaintiffs and prosecutors.

The consequences for violating the antitrust laws can be severe. A conviction can carry stiff fines for the association and its offending leaders, jail sentences for individuals who participated in the violation, and a court order dissolving the association or seriously curtailing its activities. The antitrust laws can be enforced against associations, association members, and the association's employees by both government agencies and private parties (such as competitors and consumers) through treble (triple) damage actions. As the principal federal antitrust law is a criminal conspiracy statute, an executive who attends a meeting at which competitors engage in illegal discussions may be held criminally responsible, even if he or she says nothing at the meeting. The executive's attendance at the meeting may be sufficient to imply acquiescence in the discussion, making him or her liable to as great a penalty as those who actively participated in the illegal agreement.

The antitrust laws prohibit competitors from engaging in actions that could result in an unreasonable restraint of trade. Above all else, association members should be free to make business decisions based on the dictates of the market – not the dictates of the association.

Some activities by competitors are deemed so pernicious and harmful that they are considered *per se* violations – it does not matter whether or not the activities actually have a harmful effect on competition; the effect is presumed. These generally include price fixing, allocation of customers, markets or territories, bid-rigging, and some forms of boycotts. In addition, there are many features that factor into price; agreements as to warranty duration, freight terms, or other factors that can directly impact price also are proscribed.

Other actions such as standards development, certification programs, and relationships between distributors and suppliers generally are evaluated under a rule of reason – there is a balancing between the pro-competitive and anti-competitive aspects of the activities; the pro-competitive effects must outweigh the anti-competitive ones. These areas also should be approached with caution and legal guidance.

NAHMA has a policy of strict compliance with federal and state antitrust laws. NAHMA members should avoid discussing certain subjects when they are together – both at formal NAHMA membership, Board of Directors, committee, and other meetings and in informal contacts with other industry members – and should otherwise adhere strictly to the following guidelines:

- DO NOT discuss prices, fees or rates, or features that can impact (raise, lower or stabilize) prices such as discounts, costs, salaries, terms and conditions of sale, warranties, or profit margins. Note that a price-fixing violation may be inferred from price-related discussions followed by parallel decisions on pricing by association members — even in the absence of an oral or written agreement.
- DO NOT agree with competitors as to uniform terms of sale, warranties or contract provisions.
- DO NOT exchange data concerning fees, prices, production, sales, bids, costs, salaries, customer credit, or other business practices unless the exchange is made pursuant to a well-considered plan that has been approved by NAHMA’s legal counsel.
- DO NOT agree with competitors to divide up customers, markets or territories.
- DO NOT agree with competitors not to deal with certain suppliers or others.
- DO NOT try to prevent a supplier from selling to your competitor(s).
- DO NOT discuss your customers with your competitors.
- DO NOT agree to any association membership restrictions, standard-setting, certification, accreditation, or self-regulation programs without the restrictions or programs having been approved by NAHMA’s legal counsel.
- DO insist that NAHMA meetings that have agendas are circulated in advance and that minutes of all meetings properly reflect the actions taken at the meeting. All NAHMA meetings generally should have written agendas prepared and circulated in advance.
- DO leave any meeting (formal or informal) where improper subjects are being discussed. Tell everyone why you are leaving.
- DO ensure that only NAHMA staff sends out all written and electronic correspondence on behalf of NAHMA and that NAHMA officers, directors, committee members, or other members do not hold themselves out as speaking or acting with the authority of NAHMA when they do not, in fact, have such authority.

- DO ensure that if questions arise about the legal aspects of NAHMA's activities or your individual responsibilities under the antitrust laws, you seek advice and counsel from your own counsel or from the staff and counsel of NAHMA.

Any questions about NAHMA's antitrust policy should be directed to NAHMA's Executive Director.

NAHMA Strategic Plan 2023-2028

(Final Document Approval Date: Apr. 20, 2023)

I. NAHMA Mission Statement (approved by Board Mar. 9, 2023)

NAHMA's mission as a diverse, equitable and inclusive organization is to promote development, management and preservation of quality affordable multifamily housing by advocating legislative and regulatory policy, as well as providing affordable housing professionals with the knowledge to advance excellence in the communities they serve.

II. Strategic Plan (approved by Board Apr. 20, 2023)

1) Advocacy

Objective:

Advance NAHMA's legislative and regulatory public policy on behalf of its membership and the affordable housing management industry.

How we will make this happen:

- a) Create a new online Resource Portal through which NAHMA provides regularly updated information on hot topics related to state and local legislative / regulatory issues. The goal is to provide an information resource that AHMA and NAHMA leaders and members can periodically check on to see what might be going on locally or trends across the country that an AHMA or local companies might want to follow or address. Also at the portal would be resources on how to use the information, including recommendations on how to decide what might be important to follow, suggestions on how to follow up on or advocate on issues, etc.
- b) Provide direct, regular outreach to AHMA Boards on national and local advocacy tools and opportunities
- c) Organize and hold State- or AHMA-based "Townhall" meetings with Congressional delegations via Zoom-type technology on a regular basis throughout the year, as well as upon request by AHMAs and members.
- d) Provide NAHMA's advocacy materials on the NAHMA website and mobile app to help support NAHMA and AHMA members' ongoing advocacy efforts that are not tied to an in-person NAHMA meeting
- e) Leverage positive resident relationships with Congressional delegations by encouraging NAHMA and AHMA members to provide PDFs of letters or video testimonials on NAHMA social media or in advance of townhall-type meetings

f) Create and encourage opportunities for micro-volunteering via grassroots advocacy at the federal or state level, including outreach to potential next-generation-of leaders

g) Continue to provide opportunities for in-person grassroots advocacy by NAHMA and AHMA members in conjunction with NAHMA meetings and also encourage and facilitate NAHMA and AHMA members to meet in-person with members of Congress and their staff in their district offices

h) Include a diversity, equity and inclusion focus on all advocacy activities

2) Education and Training

Objective: Provide NAHMA members with best-in-class education and training programs so that they are readied for success in managing affordable housing properties.

How we will make this happen:

a) Ensure NAHMA's courses and credentialing programs are up-to-date and accessible for delivery by the AHMAs via traditional as well as potentially new technology platforms as they might emerge, including potentially just-in-time micro learning

b) Include a diversity, equity and inclusion focus on all NAHMA's courses and credentialing programs

c) Look for opportunities to promote AHMAs' abilities to offer training, from traditional NAHMA courses to potential new topic areas including next-gen-leader development courses

d) Create "pre-credentialing" mini videos on "things you need to know before you take the test," similar to NAHMA's COQ flowchart but in video format. There could be separate testimonial videos, one for each credential, from credential holder(s) as to why you should earn that credential.

3) Other NAHMA Programs and Services

Objective: Provide NAHMA members with meaningful and varied opportunities to engage with NAHMA and their member colleagues to foster development of next-gen-leaders and grow and strengthen the organization for the future.

How we will make this happen:

a) Leverage the mission of the NAHMA Educational Foundation to provide members and potential next-gen-leaders with the ability to engage through micro- and task-based voluntarism

b) Leverage and increase the popularity of NAHMA's monthly member Zoom calls, including possibly focusing on a different main subject per call; recording the presentation portion of the calls so they can be viewed at a later time and collected in an online library; and opening up the call periodically to non-members

c) Leverage NAHMA's social media accounts to increase the association's visibility, including potentially offering more government affairs content in a high-level format that allows membership to click through for more details, as well as providing tools, resources and information-sharing that encourages NAHMA leaders and members to amplify the association's social media messages

d) Develop a program through which NAHMA affiliate members or AHMAs could sponsor attendance in NAHMA meetings for next-gen-leaders (i.e., air fare and hotel, as registration is free for first-time attendees)

e) Develop and grow a new member mentoring program

f) Review NAHMA committee mission statements and composition to ensure they are in a position to be relevant and impactful to the association's mission statement. Suggestions include, eliminating the need for an Executive-level member to chair the Membership and Marketing Committee, and creating new task forces (or subcommittees within existing committees) on issues such as social media, insurance issues, and emerging leaders

g) Research whether there are other types of membership categories NAHMA should consider forming, which would be revenue enhancing or at least revenue neutral, such as tax credit investors, public housing authorities, corporate vs individual-based, etc. Consider a special membership for AHMA Board members.

h) Leverage membership knowledge and experience, availability and desire to be involved, such as designing a system whereby members help staff translate "information" into "knowledge," as it relates to legislative and regulatory issues, and other task-based or micro-volunteering opportunities

i) Review methods of enhancing the effectiveness of the NAHMA - AHMA Federation, including possibly holding more direct NAHMA Board to AHMA Board virtual meetings, developing a brand tag phrase, and other opportunities

j) Capture the knowledge of NAHMA's "legacy" members as a way to bring together the different eras of the membership.

k) Include a diversity, equity and inclusion focus on all NAHMA's programs and activities, including:

i) Advance diversity, equity and inclusion training at the NAHMA Board level and advance DEI modeling, measurement and accountability at all levels of the association

- ii) Review the NAHMA leadership development process to ensure it includes a DEI focus and also encourages the advancement of next-gen-leaders, and doesn't include obstacles or otherwise discourages participation
- iii) Regularly offer DEI programming at NAHMA meetings