

Eliot Spitzer  
Governor



Deborah VanAmerongen  
Commissioner

**New York State Division of Housing and Community Renewal**

25 Beaver Street  
New York, NY 10004

**HOUSING MANAGEMENT BUREAU MEMORANDUM # 2008-B-02**

**To:** All Housing Companies  
Owners, Managing Agents, and Site Managers

**From:** David Cabrera, Deputy Commissioner

**Date:** February 1, 2008

**Subject:** Housing Information and Resource Conference

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Attached are the list of Workshops and the Registration Form for our **Housing Information and Resource Conference** scheduled to take place from **April 2-4, 2008** at the **Sagamore Hotel and Conference Center** located on Lake George in Bolton Landing, New York. The rates quoted on the attached Registration Form are based on a full conference package that includes:

- Overnight Accommodation and Service Charges for Wednesday and Thursday Nights
- Sagamore Welcome Buffet and Reception on Wednesday night
- Continental Breakfast on Thursday
- AM Coffee Break on Thursday Morning
- Plated Lunch on Thursday
- PM Coffee Break on Thursday Afternoon
- Continental Breakfast on Friday
- AM Coffee Break on Friday

A block of guest rooms has been reserved at the Sagamore Hotel and Conference Center for the nights of April 2<sup>nd</sup> and 3<sup>rd</sup>. **Since participants are responsible for making lodging arrangements directly with the hotel**, please mail the attached registration form to **Sagamore Reservations Department, P.O. Box 450, Bolton Landing, NY 12814-0450**; or fax this form to **518-743-6211**, by **March 3, 2008**.

Please note that although the registration form mentions children, children will not be allowed to attend any of the Conference activities. To learn more about the Sagamore you can visit their website at: [www.thesagamore.com](http://www.thesagamore.com).

This is an eligible housing company expense chargeable to account # 6390. The total allowable cost for each housing company will be determined at the time of registration.

If you have any questions regarding this Conference, you may contact Linda Kedzierski, Federal Coordinator, at (212) 480-2021, or email her at [LKedzierski@dhcr.state.ny.us](mailto:LKedzierski@dhcr.state.ny.us)

## **HOUSING INFORMATION AND RESOURCE CONFERENCE**

### **PRESERVATION STRATEGIES FOR MITCHELL-LAMA HOUSING COMPANIES PANEL DISCUSSION**

***David Cabrera, Deputy Commissioner***  
***Richmond McCurnin, Assistant Commissioner***  
***Francine Kellman, NYS HFA***

Many of our Mitchell-Lama housing companies may wish to; reduce their debt service in order to meet expenses with minimum rent increases; raise additional funds for current capital improvements; or bolster reserve funds for future capital improvements. This workshop will discuss State Preservation initiatives.

### **PREPARING FOR THE REAC INSPECTION**

***David Buchwalter, AdCar***  
***Gail Badger-Morgan, Marion Scott Real Estate Inc.***  
***Jamey Arcara, REAC Center, HUD Washington***

This seminar is designed to familiarize owners, management staff, and on-site maintenance personnel with various procedures, operational modifications and tips that can help ensure that their developments receive a passing REAC score. The presenters, who are experts in the REAC protocols will clarify what the inspector is looking for, as well as provide a few “inspection day” strategies that could add points to a housing company’s score.

### **A & E – WE’RE HERE FOR YOU**

***Larry Janota (Acting Director), Nestor Kyritsis, Ralf Torke***

The Architecture and Engineering Bureau of DHCR can provide your site with the expertise of its licensed professionals for a pre-inspection, or post inspection effort driven by established protocols. All building site components and systems could be evaluated ahead of time to better prepare your site for the “inspection day”. In the event that a failing grade is unavoidable, the A & E team can assist in calculating repair estimates and in devising solutions to help your site achieve a passing score.

### **HOUSING PRESERVATION IN FEDERALLY ASSISTED MITCHELL-LAMA and OTHER FEDERALLY ASSISTED PROPERTIES**

***John L. Kelly, Stephen J. Wallace, Joseph P. Lynch***  
***(Nixon, Peabody, LLP)***

This workshop will discuss the trends in housing preservation involving federal assistance, including Section 236 interest subsidy reduction, Section 202 Direct Loan refinancing and the restructuring of properties that have completed HUD’s Mark-to-Market program. This workshop will explain the roles of DHCR and local housing agencies, and detail the issues that arise in these transactions. This workshop will also provide housing updates from a Washington D.C. and New York State perspective.

## **EFFECTIVE TIME MANAGEMENT**

***Richard Washburn, Director, Office of Training and Development***

Just because you're on time, doesn't mean that you're on schedule. DHCR's Office of Training and Professional Development (TPD) has been helping housing professionals take the first steps in organizing their work and personal schedules. This workshop will discuss techniques to identify "time wasters" and their possible causes, and strategies for using available time more effectively. In addition to identifying ways to improve time management, the course will also identify how some of the techniques used can help increase productivity and possibly relieve stress.

## **MANAGING STRESS**

***Richard Washburn, Director, Office of Training and Development***

What is stress? Stress helps us to meet life's challenges, but too much can hurt mentally and physically. This workshop is designed specifically for busy and rushed housing professionals both in the public and private sectors. Problems, conflicts, illness, and deadlines, regardless of where they originate, affect all of us at the office. This course is designed to acknowledge the factors of stress and to help manage them. The material discussed in this session is informational and not intended as a substitute for the expertise and judgement of a qualified health-care professional. The National Institutes of Health, U.S. Centers for Disease Control, and the Channing Bete Company ® self-care series of books contributed to the data used in this workshop.

## **ROUND TABLE DISCUSSION - CHANGES IN MITCHELL-LAMA REGULATIONS**

***David Cabrera, Deputy Commissioner***

Open discussion of the proposed changes in the Mitchell-Lama regulations, particularly in regard to Procurement, Occupancy Requirements and Waivers, and Tenant Selection. Moderated by Deputy Commissioner David Cabrera, this format will encourage audience participation, discussion, and input as we enter into a new era of simplified, less onerous, and ultimately more relevant Mitchell-Lama housing regulations.

## **NEW PROTOCOLS FOR THE DHCR FIELD VISITS IN 2008.**

***Susan Caughron, Ellen Irizarry, Lois Ruderman – Office of Housing Management***

In 2008, DHCR's field visits will place renewed emphasis on Tenant Selection, Financial Administration and Heating Plant Operation. This workshop will present the *new protocols* that DHCR will follow during the field visits. This more comprehensive review will be the basis for future evaluations of our Housing Companies.

## **BOARD OF DIRECTORS IN STATE-SUPERVISED MITCHELL-LAMA CO-OPS**

***Denise Snyder, Office of Housing Management***

Board members play an important role in State-Supervised Mitchell-Lama Co-ops. The workshop will discuss the basic role, responsibilities and powers of The Board of Directors and explain the role of DHCR and the professionals hired by the housing company.

## **HOW TO IMPROVE YOUR SCORE ON THE 2007 MANAGEMENT & OCCUPANCY REVIEW (MOR) – Update for 2008**

***Linda Kedzierski, Margaret Femi, Office of Housing Management***

This two-part workshop will offer practical advice to our Owners and Managing Agents on how they can prepare their site(s) for the HUD 9834 Management and Occupancy Review.(MOR). It is essential for housing company management staff who manage our Federally Assisted housing developments to attend this *updated* training. Training in the audit process will instruct the Federally Assisted developments in how to comply with HUD requirements, thereby assuring continuation of funding. This training will be divided into two sessions:

Part A: Discussion of the specific steps that the Owners/Managing Agents *must* take *prior to, during, and after* this review to expedite the process.

Part B: Explanation and review of potential findings presented in the prescribed “*condition, criteria, cause, effect, and corrective action*” format, combined with a hands-on approach on how to avoid verification/calculation errors. The impact of change 2 on this process will also be discussed.

## **OFFICE OF FAIR HOUSING AND EQUAL OPPORTUNITY**

***Cecil C. Brown, Director, Office of Fair Housing and Equal opportunity***

***Christine Newell, Pauline McGill, Jeanette South***

DHCR’s Office of Fair Housing and Equal Opportunity is responsible for promoting the participation of minority and women-owned businesses in contracts let by DHCR, and oversight of fair housing activities and monitoring. This workshop will be divided into three parts and will present the key requirements which govern :1) Affirmative Marketing Plans; 2) HUD Section 3 of the Fair Housing and Urban Development Act of 1968; and 3) Minority and Women-Owned Business Enterprise participation.

## **CASE STUDIES IN MIXED FINANCE AND REFINANCED REDEVELOPMENTS**

### **PART A & B**

***Timmon M. Favaro & Steven J. Weiss, (Cannon Heyman & Weiss, LLP)***

Part A: *Public Housing Mixed – Finance Redevelopments.* This session will discuss those transactions in which a housing authority transfers a project to a private entity pursuant to special legislation. Substantial renovations are performed with funding through low income housing tax credits, tax exempt bonds, Housing Modernization funds, and other loans and grants, while the project continues under the overall supervision of the housing authority. (e.g.: Middletown Housing Authority redevelopment).

**Part B:** *Mitchell-Lama Refinanced Redevelopments:* This session will discuss those transactions in which a Mitchell-Lama housing company refinances and performs substantial renovations with funding from tax exempt bonds or a private lender, low income housing tax credits, and other loans and grants. Typically, these housing companies receive a Section 236 subsidy which is decoupled and applied to the new mortgage, and Enhanced Vouchers for the current tenants. The housing company does not dissolve, but remains in the Mitchell-Lama program. ( e.g.: Sacred Heart Housing Corp. refinance).

## **FAIR HOUSING SEMINAR**

***Daniel Bancroft (Broderick, Bancroft & Goldberg)***

Given by an attorney, this workshop will discuss in detail: 1) how to select residents and enforce the lease without discriminating; 2) what to do when one resident claims another resident discriminated against him or harassed him because of his race, religion, disability, familial status, national origin, or sex; 3) what a “reasonable accommodation” is and when a requested accommodation is not reasonable; and 4) how fair housing laws apply to the application process, period of occupancy, and the eviction process. This workshop will be in a non-confrontational setting in which staff can ask the attorney about fair housing issues that have come up at a particular site.

## **THE COST/BENEFIT EQUATION OF REFINANCING**

***Jacqueline Robotti, Timothy Dormady – Section 8 Project Based Program***

***Barbara Higbee – Partner, Higbee Development***

***Nikki Ferguson – Director of Housing, Embury Apartments***

Many factors need to be considered before undertaking the complicated and stressful process of refinancing and retooling your project. What are the costs and benefits to the Board, tenants and to the physical asset, itself? Building upgrades can address accessibility problems, energy efficiency and safety issues but is the process worth the disruption and hassle? Will refinancing net you the cash and physical improvements to guarantee longevity and make it worth while? The answer is most likely “yes”, but being prepared for what lies ahead is the key. A panel of development specialists and housing professionals who have lived through the process will provide the framework for you to make informed decisions.



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David B. Cabrera



**State of New York Division of Housing and Community Renewal  
Office of Housing Operations  
Wednesday April 2<sup>nd</sup> – Friday April 4<sup>th</sup>, 2008**

<b>RESERVATION INFORMATION (Please type or print legibly)</b>		Arrival Date _____ Departure Date _____
Accommodations will be occupied by:		Accommodations over the dates of this conference require a 2 night minimum stay)
Name(s): Mr. /Ms. /Dr. _____		# of Adults _____
Company _____		# of Children _____ Ages _____
Address _____		<b>LIST ROOMMATE (Sending Separate Reservation Forms)</b>
City _____ State _____ Zip Code _____		1. _____
Telephone ( _____ ) _____ - _____ Ext _____		Fax ( _____ ) _____ - _____

**CUTOFF DATE: March 1<sup>st</sup>, 2008**

Please reserve your room before the cutoff date indicated above, **by mailing or faxing** this completed form to the address listed at the bottom of this page. Reservations will not be accepted over the telephone until after the cutoff date, and then are subject to general availability.

**Check-in time: 4:00pm      Check-out time: 11:00am**

**CONFERENCE RATES:**

Room Type	Single	Double/Per Person
___Lodge Room	\$430.00	\$620.00/\$310.00pp
___Lodge Suite	\$470.00	\$660.00/\$330.00pp
___Hotel Room	\$450.00	\$640.00/\$320.00pp
___Hotel Suite	\$490.00	\$680.00/\$340.00pp

**All of our guestrooms and public areas are non-smoking.**  
There are a limited number of accommodations available within each room type category. When one category fills you will be assigned to the next category at the corresponding rate. Please label your choices in order of preference, #1 and #2. **See the back of this form for Room Type Descriptions. \*\* Please be aware that special requests such as location and/or bed type are fulfilled whenever possible, but are NOT GUARANTEED.**

**CONFERENCE PACKAGE:**

Special Package Rate includes accommodations for Wednesday 4/2 and Thursday 4/3, as well as the group dinner on Wednesday 4/2, group breakfasts on Thursday 4/3 and Friday 4/4, and the group lunch on Thursday 4/3. The Package rate includes all service charges for these meals and the resort service charge for the room. Rates are subject to 7% NYS Sales Tax & 4% Warren County Occupancy Tax, unless tax exempt status has been approved.

**ADDITIONAL INFORMATION:**  
Please refer to the back of this form for additional information about The Sagamore and visit our web site at [www.thesagamore.com](http://www.thesagamore.com)

**DEPOSIT POLICY:**

All reservations must be secured with a deposit equal to total package price listed, which must include the service charges listed. The total deposit will be applied to your designated length of stay.

Please send a check, money order or indicate your credit card, date of expiration and amount to be charged below. Your credit card will be charged upon receipt of the information below.

Credit Card Company \_\_\_\_\_ Exp. Date \_\_\_\_\_

Account # \_\_\_\_\_ Amount \_\_\_\_\_

Security Code (Last three digits on back of card) \_\_\_\_\_

Name on Card \_\_\_\_\_

Signature \_\_\_\_\_

\_\_\_ Please initial here if this card is not the attendee's and it is to be used for payment of the balance for this room reservation (excluding incidentals). **If so, the full amount due will be charged at time of booking.**

**CANCELLATION POLICY:**  
Should you cancel more than 14 days prior to your arrival date, your deposit will be refunded less a \$35.00 processing fee. Should you cancel within 14 days of your arrival, or shorten your stay, it will result in forfeiture of your deposit.

**TAX EXEMPT INFORMATION:**

**If your New York State tax exempt organization is paying for your stay, the following information applies:**  
A completed ST 119.1 form as well as a **copy of your form of payment** (Company Check or Company Credit Card) must be received with this form.

**If paying by personal check, credit card or cash, the following information applies:**  
**NYS Employees or Employees of its political subdivisions:**  
A completed AC-946 form must be received with this form. Proper identification will need to be shown at check-in.

**US Government Employees:**  
A completed ST-129 form must be received with this form. Proper identification will need to be shown at check-in.