

Minutes of the Combined Meeting of  
NAHMA Certification Review Board  
&  
NAHMA Education & Training Committee  
NAHMA Conference Call Line  
Sunday, October 27, 2019  
10:30am EST

Alicia Clark, Chair of E&T  
Heather Staggs, Vice Chair E&T  
Gwen Volk, Chair of CRB  
Richard Skoczylas, Vice Chair of CRB (not present)

The meeting was called to order by E&T Chair Alicia Clark. Alicia welcomed members of the CRB and Education and Training Committees. Minutes were taken by Alicia Clark for all action items.

Need to review both March and June minutes and make a motion due to not having a quorum present on the June combined call. Can I get a motion to approve March minutes and June minutes; motion made by Pam Monroe, second by Peter Lewis.

**Old Business**

A. Credential Statistics/ Course Updates

- a. NAHMA staff provided course review and handout for review.
- b. It was noted that 5 one-day CPO's were offered by SAHMA on the June report. All one-day courses were offered in conjunction with SAHMA state conferences.
- c. October report shows, Additional 2-CPO courses held in September, reflecting a 10% increase in CPO exam pass rate.

B. CPO 1 Day Course

- a. CPO 1 Day update provided by Gwen and Heather. Course was offered last Spring, following this offering, the course instructors held a conversation about additional revisions needed. A small group met to hold working meetings to adjust the content and format, result was to offer additional courses by Gwen Volk and Mike Alexander, who then met to discuss post training.
- b. The 1-day pass rates have been exceptionally high, due likely to the more advanced and experienced staff who already hold 4350.3 knowledge.
- c. AHMA's should continue to market the course as a refresher opportunity.
- d. Update to course materials to reference or recognize Federal Register notices or compliance updates. Included a drive with updated materials to be utilized by trainers.
- e. Rewrote the case study used for the day 2 homework, changed the presentation to replace the old version in both the CPO 1-day and 3-day.
- f. Michael Alexander spoke about his teaching experience; attendees came with high level of knowledge of the 4350.3 so 1-day course does not need to focus on that level. Trainers, AHMA's, and companies, need to really drive sign-ups to experienced and knowledgeable staff only.

- g. Deb noted for clarification that the manual should not be distributed electronically. NCSH provides a printed copy 2-weeks in advance of the training date.
- C. BCD Task Force
- a. Small group met on 10/26/19 to review, provided assignments to key members for 4 chapters. Removed large generalized information and created small segment areas to focus on housing programs/overview and then highlight eligibility, funding, and fair housing.
  - b. Scheduled second call for January 14<sup>th</sup> 2020 goal to update for January and have available by March 2020 meeting.
  - c. Revising exam after updates to recognize new content.
  - d. Committee includes: Gianna, Kurt, Eileen, Heather, Gwen and will add: Anita, Deb, and Larry.
- D. Advanced Occupancy Course
- a. A discussion was held about the need for an advanced occupancy course, and the AHMA's wishes to offer one to their membership.
  - b. Pushing back to conduct industry research and survey for additional needs.
  - c. Task force: Eileen, Betsy, Gianna, Heather, & Gwen
  - d. Will review for specific chapters on upper level occupancy issues and expand basis and content for Advanced.
- E. AHMA Procedure manual
- a. A task force of AHMA Executive EDs was formed at the March in-person meeting to assist in the updating of this manual. Brenda indicated it is currently 80% complete, will turn over to sub-committee by the end of November 2019. Goal date to return revisions is February 2020, to announce completion by March 2020.
  - b. Recognized Daria for her time commitment in the procedure manual update.
- F. NAHP Application Process
- a. Shortcut and tracking form reviewed; feedback provided by AHMA's not knowing the tracking form was a requirement of the renewal process, in addition to the supportive documentation.
  - b. Gwen commented that CRB is the review agency – recognized the voting members of the board. Noted the meetings are open to all, the interest to serve however must be disclosed as it is an appointed board. The board reviews and approves all applications.
  - c. Applicant details are very important, i.e. include the full dates, rather than number of years so that all of the details are understood and clear.

## **New Business**

- A. CPO 1Day/CPO 3 Day Course Manual & Exam
- a. Trainers determined changes that were systemic in the CPO should be placed/update in both 1-day and 3-day. Recommendation to move 2 specific chapters for a pilot course for Chapter 12 (to after asset, income, and adjustment chapter) and moved Chapter 13 (which is EIV, to after verification). This was done to improve the flow of the course and the outcome was an improved flow.

- b. One item of change was the Day One Rent Calculation Case Study needed to be worked into the course day, rather than take home assignment. Now end with one take home item that includes all aspects of the course.
- c. Recommending a need to update the course temporarily to navigate the current PowerPoint and course; Gwen offered to share the notes to the trainers.
- d. Debbie shared with the group the course was originally designed as Gwen indicated above, but was changed 3-5 years ago to offer a big picture first, then go back through the details.
- e. Exam would need to be updated relative to the 12 notices put out over the prior 13 years.
- f. Anticipating a new manual to be released soon, holding on changes with the assumption major overhaul may be needed after release of the update HUD 4350.3
- g. Natasha shared the exam results including the 85% pass rate for the course.

#### B. Student / Trainers Materials

- a. Natasha shared the feedback on the CPO 1-day materials request, have been emailed and posted on procedure manual page.
- b. Rent computation was not being printed by students, so offering a reminder to the students to ensure they download 3 copies of the rent computation so copies do not need to be made
- c. Adding there are updates to the 4350.3 including regulation and policy changes (1 copy for in class, and 1 additional). Gwen indicated only the summary page needs to be printed, not the 97 pages of notices.
- d. Students will receive 1 printed copy of the 4350.3 and a policy update sheet; they also receive an electronic or flash drive.
- e. SAHMA clarified they are printing all of the documents and providing paper documents at the training. They offer the electronic items by email or through a download link.
- f. 3 options: NAHMA can print all documents and offer flash drive, AHMAs can print their own copies and distribute in-class, or AHMAs can send electronically and students can download and print to bring to the course. AHMA's, at their discretion can distribute the Case Study and/or the Rent Computation document.
- g. Heather Staggs indicated she feels the Case Studies should be considered Course Material, but the Rent Computation document should be included with the electronic documents.
- h. Michael Alexander shared students indicated frustration that they could not utilize the 4350.3 they personally utilize.

#### C. CPO Trainers Exam

- a. Brenda shared a response to the question posed to CRB – one of the steps to becoming a trainer is taking the: CPO course, CPO Exam, CPO trainers Exam (written form). Gwen Volk indicated the CPO Exam and CPO trainer Exam is different in that the trainer Exam requires citations and research/writing form of the test.
- b. Debbie Piltch indicated she is encouraging individuals to become a Trainer; however, the student process appears redundant. Recommends for those pursuing becoming a trainer, the CPO online Exam portion be omitted.
- c. Welcomed Sonja who is the most recent CPO trainer, she shared the online and written does not need to be done. More important is be in class and understand the process
- d. Gianna Solari Richards, made a motion to vote to allow those pursuing a CPO Certification in order to become a trainer be allowed to skip the online exam and take only the written trainer version of the CPO exam Debbie Piltch, second the motion. Vote to skip the online exam and take only the written trainer version of the CPO exam:

i. All votes for approval, No opposition

D. FHC Appendix

- a. Heather Staggs made a motion to discuss the outdated documents of the Fair Housing documents/appendix.
  - i. Larry recommended Heather update or create a task force.

E. New Trainers

- a. Gwen shared the need for new trainers who are professional trainers without full time jobs. Emphasis a need to recruit trainers who are focused solely on industry specific trainers.

F. Michael Alexander recently had a situation where 20-25 students taking a SHCM exam, some with laptops that would not download the exam. Additionally, had the exam go down multiple times during the course of the students taking the exam.

- a. Gwen indicated the problem is having all students within a single test location, using one wireless connection, guidelines have been shared by NAHMA regarding the test limitations and anyone with questions can reach out to NAHMA for full guidance.

No additional Items, the meeting was adjourned.

Respectfully Submitted By:  
Alicia Clark