

MAY-JUNE  
2023

The official publication of the  
Indiana Apartment Association

# INsites

**Legislative Wrap-up**

**12**





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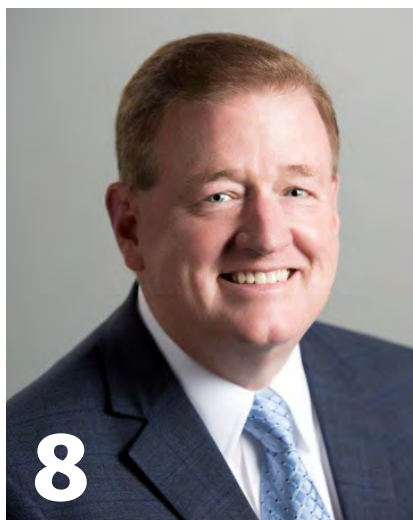
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## FROM THE IAA CHAIR

**Sandy Carmin**  
IAA Chair

### Maximize Your Member Benefits

As a member of the Indiana Apartment Association, you and your team have access to a wealth of resources, education, networking opportunities, and more. Now is the perfect time to get your teams involved to expand their skillsets and professional networks. With most of the education programs being hybrid or completely online, the whole team can take advantage of these resources! This is not limited to your staff in the state of Indiana. Your teams can take advantage of these resources no matter where they are located through IAA's Affiliate Member program. This offers your teams out of state an opportunity to participate in these courses at a significant discount! Now is the time to take advantage of this program. Review IAA's upcoming education to ensure your team is continuing their professional development journey in 2023.

#### Resources

So much goes on at the federal, state, and local levels when it comes to ever changing policies, rental assistance, code changes, and more. The IAA Government Affairs team has worked hard this legislative session to ensure we remain informed on policies impacting our industry and have advocated tirelessly on our

behalf to all elected officials during this time. See complete details of IAA's legislative session on pages 12–18.

#### Education

IAA has one of the most robust and unique education programs across the country. First off, we offer free education for all members with over 25 seminars offered this year. With this free education being virtual, your team across the state can access this immediately right from their desks! With many of these courses being saved on IAA's website on the 'Past Webinars' page, your team has on demand access to previously offered education all the way back to 2022! Some of these webinars include the Indianapolis Energy Benchmarking & Transparency Program, Fair Housing Basics, Disaster Preparedness, Mental Health 101, and more!

Secondly, IAA offers a complete line of nationally recognized certification courses from CPO to NAA certified courses. With CAMT coming up in September and CAM in October, it is crucial your staff gets registered now while space is still available to ensure they get their certifications in 2023. Your team outside of Indiana will receive the 'Affiliate Member' rate on all certifications and designations as well. Simply select the 'Affiliate Member' option when registering to ensure they can take advantage of these programs at a discount!

These are just a few of the member benefits offered to you as a member of IAA. Don't hesitate to share association emails and publications with your team members. Doing so only makes your team more knowledgeable and our industry stronger.

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## Calendar Preview

For the full IAA calendar of events, visit [iaaonline.net](http://iaaonline.net).



Earn your CEC credits via our Education Seminars!

Register online for any of these upcoming courses by scanning the QR code or visiting [www.iaaonline.net](http://www.iaaonline.net)

# july

11-13	<b>CAPS Express - Certified Apartment Portfolio Supervisor</b>	<b>Online Only</b>
13	<b>EPA/CFC Certification July Test Prep</b>	<b>Hybrid</b>
18	<b>Maintenance Fair Housing</b>	<b>Online Only</b>
19	<b>SAL Visionary Leadership Program – Day 3</b>	<b>Hybrid</b>
27	<b>5 Step Decision Making Formula</b>	<b>Hybrid</b>

# august

16	<b>SAL Visionary Leadership Program – Day 4</b>	<b>Hybrid</b>
17	<b>Cornhole Tournament</b>	<b>Indianapolis</b>
22	<b>How to Approach Difficult Conversations</b>	<b>Online Only</b>
29	<b>Fair Housing Trends</b>	<b>Online Only</b>



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## FROM THE PRESIDENT

**Lynne Petersen, CAE**  
IAA President

### IAA Responds to Downtown Economic Enhancement District

At the conclusion of the 2023 Indiana Legislative Session, after special taxing district language was slipped into the budget (without any advanced warning or without passing a single committee or any chamber of the legislature), IAA was contacted by the *Indianapolis Business Journal* to write an editorial for *ForeFront* — a series offering different perspectives on political issues. On Friday, May 12, 2023, the following editorial was published representing the multifamily housing industry's perspective on Economic Enhancement Districts.



### Additional tax could create unintended consequences

Generally, once a tax is created, it rarely disappears. It turns out government always finds a way to spend that money or allocate that funding stream to something deemed “necessary.”

The Indiana Apartment Association represents nearly 5,000 apartment homes within the Mile Square of Indianapolis, and thousands more professionally managed apartment homes downtown. Imagine our surprise when we learned the Indiana General Assembly granted the Indianapolis City-County Council the authority to levy an additional tax assessment onto businesses and residences downtown to fund some services that presumably property tax dollars already fund.

Slipped onto page 235 of the budget, economic enhancement districts (EED) are nearly identical to economic improvement districts (which are already permitted under current law, see IC 36-7-22), except without any protections for property owners. This probably would have been mentioned by the downtown business community had the EED language ever been scheduled for a hearing or disclosed before 5 p.m. the day before session ended.

In 2018, economic improvement districts (EID) had some guardrails added to them, which added some important accountability. It mandated that, before the City-County Council could adopt an ordinance establishing an EID, a petition must be signed by 60% of the owners of real property within the district and 60% of the assessed value. The thought behind this protection is that any assessment or tax should not occur without a detailed plan and buy-in from the impacted property owners.

Downtown Indy Inc.—rather than drafting a plan and a budget, then marketing that plan to business owners downtown—successfully convinced the Legislature to grant a new special

taxing district, drawn on arbitrary lines, omitting accountability to the very taxpayers who will fund its programs.

Currently, no one has seen a plan, nor has any matrix been disclosed to measure success, which is fiscally prudent and necessary.

Additionally, the new EED gives wide discretion to use new tax funds for a broad array of projects. However, a few categories are super concerning, especially given their broadness, including “activating and promoting public events, creating innovative approaches to attracting new business, supporting business development, and planning improvement activities.”

These special taxing districts are nothing new. Downtown Indy Inc. tried the same tactic unsuccessfully in 2018 when over half the property owners in the district rejected the lackluster plan and the City-County Council defeated the petition to establish an EID. Back then, a more politically balanced council (14 Democrats and 11 Republicans) thought through the optics of supporting a tax increase that was not supported by the very people being taxed and were concerned about the harmful effects on businesses and residents that were already paying the highest tax rate in the city.

It is our hope that the Indianapolis City-County Council, the Mayor's Office, Downtown Indy Inc. and the new Economic Enhancement District Board exercise restraint and act fiscally responsible, understanding that the impacts of additional taxes to the businesses and residences downtown could create unintended consequences.

Downtown might need a special taxing district, but that should be up to the property owners downtown to decide. The tools already exist in state law to address this. It just requires working with community members to hear their voices and gain their support.



# Welcome IAA's New Professional Development Manager



Adrian Coleman is a graduate of Harrison College with a bachelor's degree in business management. Professionally, her background has been in the real estate industry with experience as a realtor and sales assistant for an Indianapolis based home builder. Adrian has always had a passion to take on new challenges and learn new skills, which has led her

to take on new challenges in the multifamily housing industry. She began as a leasing professional of a 300-unit property in the Indianapolis area before becoming the Assistant Property Manager. She later moved into a role as a Commercial Lease Administrator for an Indianapolis based commercial real estate brokerage. With her industry knowledge and understanding of the importance of continuing education, we are so excited to have Adrian join us at IAA as our Professional Development Manager!

Thursday, August 17 • 3:30 – 6:30 p.m. EST

## 2023 Cornhole Tournament to Benefit Rebuilding Lives!

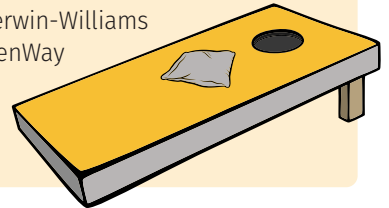
APCO Supply (8119 Zionsville Road, Indianapolis, IN 46268)  
Member Cost: \$145 (Team of 2); \$55 (Spectator)

Do you have what it takes to win? Join us for the 2023 Cornhole Tournament! Enjoy live music, food trucks, drinks, and friendly competition for an afternoon of networking and fun away from the office. Register your team or simply attend as a spectator to join in the fun.



Part of the proceeds benefit Rebuilding Lives, a campaign that supports members of the Indiana Apartment Association throughout the state of Indiana by providing assistance to residents who have been affected by natural disasters.

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## FEATURE

### *Michael E. Gorman named to the National Apartment Association's Hall of Fame*

The NAA Hall of Fame recognizes owners/managers from the rental housing industry for their long-term history of exemplary national service and accomplishments to the National Apartment Association and the rental housing industry.

At Apartmentalize in Atlanta, Michael (Mike) Gorman, President of the Indianapolis Division of Edward Rose and Sons, was honored and named to the National Apartment Association's Hall of Fame. For over 40 years, Mike Gorman has served in various capacities and advocated on behalf of the multifamily housing industry at the state and national levels.

Gorman served the National Apartment Association in several critical capacities, including all positions on the Executive Committee and Chair of the NAA Board in 2011. Under Gorman's leadership at NAA, he was instrumental in renegotiating the NAA/NMHC legislative agreement for federal government affairs. He also focused heavily on legislative initiatives during his time as Chair and worked to increase donations to the NAA PAC, which provides a critical lifeline for advocacy with federal elected officials.

Gorman serves on the IAA Board of Directors and on the IAA Executive and Finance Committee and was Chairman of the Board in 2001-2002. In 2003, Gorman was awarded the Joe Rhodes Memorial Lifetime Achievement Award – one of IAA's highest awards for his contribution to the multifamily housing industry.

Mike's body of work in the multifamily industry speaks for itself. He has been a tireless advocate for the industry on numerous fronts and has had a significant impact on NAA, IAA and the entire industry. Congratulations to Mike on the 2023 NAA Hall of Fame Award.



### *The Justus Companies Breaks Ground on Noblesville's New 55+ Community*

The city of Noblesville will soon have a new community designed exclusively for ages 55 and better!

Joined by the Noblesville Chamber, partners and respected business contacts, the Justus Companies recently celebrated the Promenade Trails groundbreaking on a 30.25-acre site adjacent to Promenade Apartments, near the northeast corner of Little Chicago Rd and SR 32.

"Aptly named Promenade Trails, this new pedestrian-friendly community will feature both individual cottages and apartment homes spread across a beautiful campus of mature trees, sparkling ponds, a central park area and walking paths connected to nature trails," said Walt Justus, President/CEO of The Justus Companies.

The 59 single-story cottage homes surround the Community Building consisting of 151 apartment homes. Whether retired or simply an empty nester, residents of Promenade Trails will experience the comforts and convenience of maintenance-free living without the responsibilities of home ownership.

### *Ironmen Properties Hosts Basketball Game in Historic Gymnasium at The Laurel Flats*

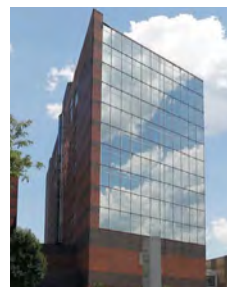
The Laurel Flats, a historic apartment building that served as home to The Crawfordsville High School for over 80 years, proudly partnered with the current Crawfordsville High School to host a throwback basketball game.



The throwback game was the first basketball game to be hosted in the historic gymnasium in nearly 30 years. The event was sold out with 1,600 people in attendance and included local city officials, former coaches, and Indiana all-stars.

The partnership between Crawfordsville High School and The Laurel Flats has been an ongoing success since its inception earlier this year. Ironmen Properties hopes to see The Laurel Flats make an impact for Crawfordsville for years to come.

### *Praxm Management Group To Manage New Gathyr Apartments By 1820 Ventures*



The former Residences At Keystone Crossing will be reimagined with property enhancements and an elevated resident experience.

The 129-unit community – formerly the Residences at Keystone Crossing (8785 Keystone Crossing in Indianapolis) – will be revitalized with property



enhancements and repositioned as a lifestyle destination in the heart of the Keystone Crossing area. Steps away from some of the area's best retail, dining, and entertainment, VITRA residents will have access to high-end amenities, including an indoor swimming pool and hot tub, an onsite fitness center, bike storage, and pet spa, as well as distinctive services like room service and concierge support.

### *The Garrett Companies Named Top Employer*

The Garrett Companies has been named a Top Employer by the National Apartment Association for the third consecutive year. This list is exclusive to organizations that have



created an environment of "collaboration, innovation, and hard work." At the state level, The Garrett Companies has made the Indiana Business Journal's 2023 Fast 25 List. Finishing 20th overall, this is the 4th time the company has been recognized on the Fast 25. This award acknowledges The Garrett Companies as one of the fastest-growing privately held companies in the state of Indiana. Eric Garrett, President of The Garrett Companies commented on recent recognitions stating, "Our goal is not just to grow. We won't sacrifice our culture to extend our footprint. With such a team-oriented environment, this award is a credit to our people and all the incredible work we are doing across the country. When you have the best personnel working on the best projects, you are bound to flourish."

### *Glick Team Volunteers with the Indianapolis Cultural Trail*



Team members from the Gene B. Glick Company recently participated in a volunteer day focused on maintaining and enhancing the beauty of the Indianapolis Cultural Trail, an urban, linear park that connects many of the city's Cultural Districts and historic places to visit. Glick's connection to the cultural trail stems in part from the company's founders, Eugene and Marilyn Glick, who contributed \$15 million as a philanthropic gift to help create it.

"Our Glick Cares volunteer events inspire our team members to live our company's values in the community," said Stacey Sunderman, Glick's Chief Financial and Operating Officer. "Glick is committed to making a positive impact in the communities we

serve and to building value for people and places. Our volunteer days are an important way we honor that commitment."

### *Thompson Thrift Hosts Serve Day*



Over 175 team members came together for the Spring Serve Day on Thursday, April 27, helping to continue to transform the Next Step campus and surrounding neighborhood in Terre Haute, IN. The sounds of hammers, chain saws, paint rollers, forklifts, and skid steers rang through the neighborhood as team members worked to install new windows and doors, paint, landscape, build a gazebo, clear and create a paver patio, and so much more! 32 different projects were completed throughout the day.

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## Apartment Association of Fort Wayne NE Indiana

### Annual Summit Celebration Award Winners

The Summit Celebration Committee was held on Saturday, March 25, at Ceruti's Summit Park. AAFW-NEI members and guests registered to celebrate the best in the multi-family housing industry in Northeast Indiana. It was the 36th gala and our first back in-person since 2018. We were excited to see so many members in attendance to celebrate the nearly 40 industry professionals nominated.

The Summit Celebration is a time to honor excellence in our industry, celebrate the accomplishments of our Association and recognize the invaluable dedication of our members to our industry and our community. It is only with the involvement and support of our members that we can be the vibrant and vital organization that we are today.

#### Summit Celebration Winners Included:

Sharon K. Hauser/Manager of the Year - [Rebecca Newman](#), Capri Meadows Apartments

Best Maintenance Team - [Canterbury Green Apartment Homes](#)

Assistant Manager of the Year - [Deana Snyder](#), Windsor Oaks Apartments

Maintenance Supervisor of the Year - [James Bopp](#), Canterbury Green Apartment Homes

Maintenance Technician of the Year - [Mark Felger](#), Superior Lofts Apartments

Associate Member of the Year - [Hays & Sons Complete Restoration](#)

Leasing Consultant of the Year - [Homer Rasler](#), South Bridge Apartments

Distinguished Service/Outstanding Volunteer - [Joe Beier](#), AAA

Rookie of the Year - [Katie Potter](#), Canterbury Green Apartment Homes

Outstanding Customer Service - [Karen Koehlinger](#), Canterbury Green Apartment Homes

Rising Star - [Hope Zellers](#), ProFed Credit Union

Presidents Award - [Thomas Chronister](#), Chronister Properties

You can find videos of winners and guests on our YouTube page [@apartmentassociationoffort6065](#)

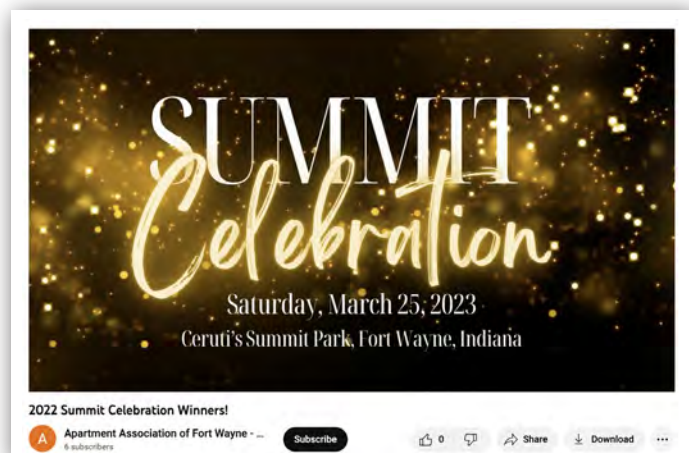


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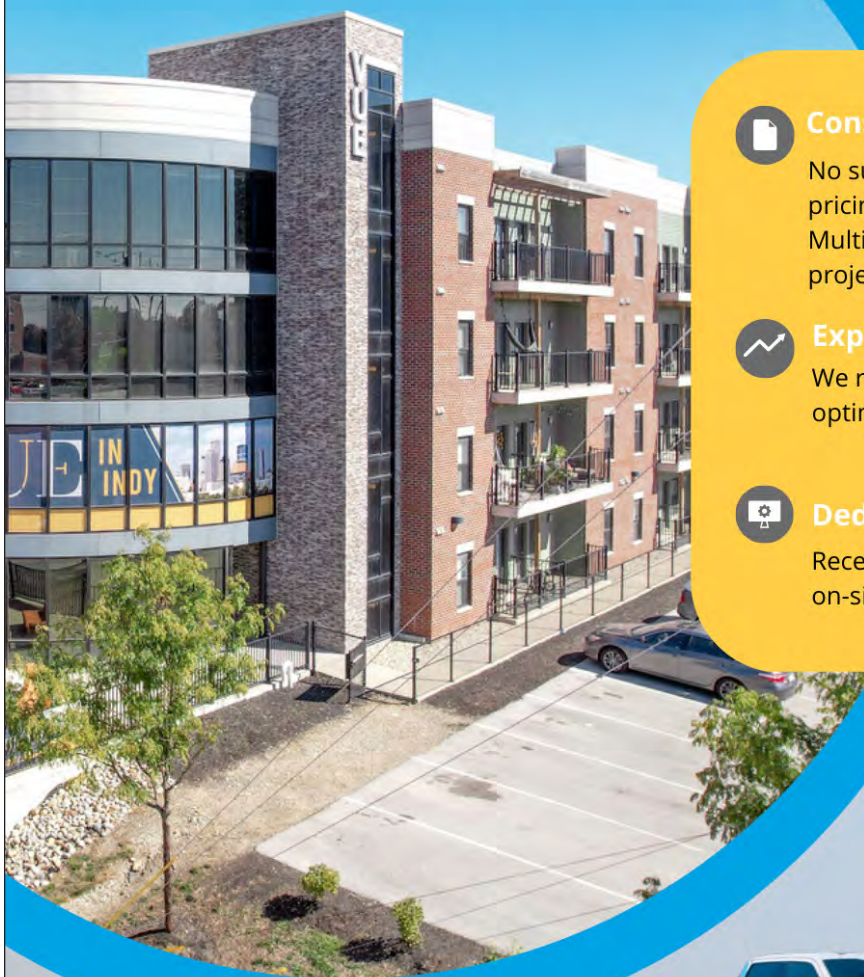
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**Brian Spaulding, J.D.**  
Vice President of Government Affairs

## 2023 Indiana Legislative Wrap Up

The 2023 Indiana Legislative Session ended at 2:20 a.m. on April 28. The Indiana General Assembly met for 110 days, ultimately approving a two-year \$44.5B budget for fiscal years 2024 and 2025 and passing 252 of 1,154 bills filed this legislative session.

Overall, IAA had a successful session preventing several bills that would have drastically reformed the industry from receiving a hearing, which are detailed below. IAA also had several important bills that passed, which provide transparency on property tax record cards (HEA 1454), aid in property tax appeals (HEA 145), clarify third-party rental inspection sample sizes (HEA 1454), create a revolving loan program to help fund public infrastructure to support housing (HEA 1005), and reform the building code and standard review process (HEA 1575). Articles on those bills can be found in this issue.

However, despite all the successes this session, there was one issue that arose in the final 34 hours of the legislative session. IAA was blindsided by a provision placed in the budget on page 252 that we discovered after it was published at 5 p.m. on April 26. That provision created a special taxing district for properties in Indianapolis' Mile Square. The language found on pages 252–255 was never introduced in a bill, never heard in a committee, never debated on the House or Senate floor, and never communicated or hinted to IAA. Despite our messages, calls, and face-to-face meetings in the last hours of session frantically and vigorously advocating for its removal, IAA was unable to delete that language or put guardrails around the language. Lynne Petersen's column details more about the Economic Enhancement District and this historical context, which likely resulted in its language being kept secret.

Notwithstanding the issue with the budget, IAA spent much of the early months of session ensuring that bills attempting to revolutionize rental housing in Indiana were defeated. Like previous sessions, democrat members and a moderate republican senator introduced bills establishing rent escrow, repair and deduct, lead testing standards, bed bug strict liability for property owners and more. IAA worked to ensure these bills did not receive a hearing or advance in the legislative process. However, these bills will likely get introduced in future sessions. Following is the comprehensive list of bills that IAA was able to defeat:

**HB 1089 – Recovery in Nuisance Actions –**  
Rep. Moed (D – Indianapolis)

HB 1089 would have allowed a city, county, or town in a nuisance action to recover certain damages, fees, and costs from a property owner

or a resident. The inspiration for this bill came from Indianapolis' failed attempts to collect costs for emergency runs to Town and Terrace, which is a condominium. This bill was assigned to the House Committee on Local Government and never received a hearing.

**HB 1242 – Public Health Reporting for Rental Housing –**  
Rep. Campbell (D – West Lafayette)

HB 1242 would have allowed residents to report unsafe rental housing conditions to the local health department who must then investigate. It provided that the health department should hold a hearing and make findings of fact before making recommendations for department action. It also provided that the department can issue a warning to a property owner, impose a penalty, or bring a cause of action against the property owner to compel action. The bill also would have expanded the duties and responsibilities of property owners to their residents on issues like heat, infestations, and mold. This bill was assigned the House Committee on Public Health where it never received a hearing.

**HB 1467 – Children and Lead Hazards –**  
Rep. Boy (D – Michigan City)

This bill would have required every child at seven years old to be tested at school for lead levels. It also forced property owners who rent or sell their properties to anyone with a child under seven to have the property inspected for lead levels by someone licensed or certified to test for lead. If a property owner sold or leased a unit with a lead hazard to a family with children under seven, they could have been charged with a Class C misdemeanor. This bill was assigned to the House Committee on Judiciary where it never received a hearing.

**HB 1532 – Landlord-tenant relations concerning bed bugs –**  
Rep. Porter (D – Indianapolis)

This bill would have required a resident to inform the property owner if the resident reasonably suspects the presence of bed bugs. The property owner would then have been required to have a licensed inspector inspect the dwelling unit and contiguous dwelling units for bed bugs. After the inspection, the property owner would have been required to share the inspection report with the resident. If bed bugs are present, the property owner must begin reasonable measures to treat the bed bugs. Even if the inspection report found no bed bugs, the resident could contact the health department for another inspection. All expenses from inspection for bed bugs to extermination of bed bugs are always the financial responsibility of the property owner. This bill also would have created procedures



regarding notice, access to the dwelling unit, and costs involved in the inspection. It would have allowed the state chemist to adopt rules and establish requirements for certification of bed bug inspectors. This bill was assigned to the House Committee on Judiciary and never received a hearing.

#### **HB 1541 – Utility Service to Rental Premises –**

Rep. Soliday (R – Valparaiso)

This bill would have forced 100% of a property's rent into escrow when a property owner had agreed to provide a utility but fails to remain current. This bill would have applied to property owners with at least 100 rental units that are master metered for one or more utility services. Money placed into escrow gets distributed to the utility first ahead of all other lienholders. This bill was inspired by the notorious property owners in Indianapolis who owed nearly \$2M to Citizens Energy Group. IAA adamantly opposed this bill because it was an unconstitutional taking and it violated existing laws on secured transactions. IAA met with the bill's author and relevant stakeholders. The bill's author agreed not to advance the bill. This bill was assigned to the House Committee on Utilities but was not heard.

#### **SB 202 – Various Housing Matters –**

Sen. Qaddoura (D – Indianapolis)

SB 202, which was very similar to HB 1148 introduced by Rep. Sue Errington (D – Muncie) this session (and also very similar to SB 230 from last year) would have broadly expanded essential systems that must be provided to a resident, mandated that essential systems must be repaired or replaced within 24 hours of an issue, allowed a resident to petition a court to escrow rent to compel action from a property owner, and it would have allowed, in certain circumstances, a resident to repair their own dwelling unit and deduct those amounts from their rent ("repair and deduct"). Further, it required property management companies to have sufficient connections to the State of Indiana prior to being able to manage rental property. IAA opposed both the House and Senate versions of this bill, which were both referred to their respective Committees on Judiciary. The Senate Committee on Judiciary scheduled the bill for a hearing, but ultimately stripped and inserted a study committee for the second consecutive year. The bill, even as a study committee, failed to advance in the House. HB 1148 never received a hearing.

#### **SB 330 – Payroll information on public finance construction**

– Sen. Bohacek (R – Michiana Shores)

SB 330 would have required a contractor, except a tier 1 contractor, on a public works project or tax advantaged construction project to complete a weekly report of wages and hours of the contractor's employees who work on the project. The bill required a contractor to retain this information and produce it upon inspection by a public agency or the department of labor. While potentially unharmed

on its face, this law would increase the cost of compliance for these types of construction projects and be weaponized against contractors. IAA opposed this bill.

On Thursday, February 9, this bill received a hearing and took a bizarre turn. The bill advanced out of the Senate Local Government Committee unanimously, despite opposition from construction and building trade organizations. Fortunately, after IAA's discussions with the author of the bill, Senator Bohacek refused to call the bill for consideration on third reading, killing the bill.

#### **SB 333 – Rules governing certain construction inspections –**

Sen. Messmer (R – Jasper)

On January 24, SB 333 received a hearing in the Senate Homeland Security and Transportation Committee. This bill delegated to the Fire Prevention and Building Safety Commission (FPBSC) the authority to determine what structural inspections class 1 structures should be governed by. Currently, Indiana does not have any specific requirements for structural inspections due to a statutory pre-emption, essentially nullifying the FPBSC's ability to adopt any requirements. This bill advanced out of committee, but ultimately was not voted on in the Senate, as the author did not call the bill on third reading due to lack of support from his Republican caucus.

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## Bills IAA supported that did not advance

**HB 1029 – Legal Action involving crimes on private property –**  
Rep. Torr (R – Carmel)

HB 1029 would have prohibited causes of action against a property owner, a business owner, or a third-party business operator for a criminal act committed by another person on the property, at the business, or on a premises owned by another person. IAA met with Rep. Torr requesting that this bill be filed over the summer after conversations with members regarding concerns over property insurance rates and pending action by HUD that might force property owners to rent to residents with violent criminal records. This was one of IAA's bills. Unfortunately, House and Senate members who are attorneys did not like the language and the windfall it could offer negligent bar owners. Ultimately, IAA and trial lawyer friendly legislators could not come up with a compromise. IAA will attempt to introduce language in a future session to address this issue.

**HB 1075/SB 278 – Nonprofit Corporations –**  
Rep. Jeter (R – Fishers)/Sen. Freeman (R – Indianapolis)

This bill was a priority for the Indiana Attorney General's Office, which addressed issues the office ran into when attempting to

act against JPC Affordable Housing and USA Gymnastics. The bill would have given the Attorney General explicit authority to make civil investigation demands of non-profit corporations when wrongdoing is suspected, it allowed the Attorney General to seek civil penalties from non-profit corporations that refuse to comply with an investigation, and it required non-profit corporations to retain records for three years. The Attorney General characterized the bill as a "light touch" to give some mechanisms for the Attorney General to target bad actors who are exploiting their customers or donors. IAA was neutral on this bill but watched it closely to ensure non-profit corporations that provide housing are not broadly targeted. While this bill and its Senate version passed their respective chambers, neither bill advanced after halftime.

**HB 1489 – Sewer and storm water fees incurred by Tenants –**  
Rep. Smith (D – Gary)

This bill would have prohibited a municipal utility from attaching user fees or otherwise putting a lien on a property due to unpaid sewer bills from a resident in certain circumstances (like when it has received property notice). This bill also required the assessing entity to release certain liens and delinquent user fees upon receipt of a verified demand in writing from the owner. It also established billing procedures for municipal sewage or storm water fees assessed to rental properties. This bill was introduced last year where it did not receive consideration. IAA always supports this bill, which is always brought by Dr. Smith. However, this year the bill did not receive a hearing in the House Committee on Utilities.

**SB 174 – Indiana Historic Tax Credits –**  
Sen. Dernulc (R – Highland)

SB 174 bill would have allowed a transferrable tax credit against a qualified taxpayer's state tax liability in an amount equal to either 25% or 30% of the qualified taxpayer's qualified expenses related to the rehabilitation of a qualified historic structure. The bill also allowed a qualified taxpayer that is a tax exempt 501(c)(3) the credit equal to 30% of the qualified taxpayer's expenses. While the bill received a hearing in the Senate Appropriations Committee where IAA testified in support of the bill, the bill ultimately was not voted on nor were funds appropriated in the budget. This bill could have provided a great opportunity in rural communities to repurpose buildings for apartment communities. IAA is hopeful it will be introduced again in the future.

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## Housing Coalition, IAA Obtain Historic Funding for Public Infrastructure Supporting Housing

After the Indiana Housing Task Force finished its work this summer, it issued several recommendations calling on the legislature to invest boldly in workforce housing. Many believed that this might be the year that Indiana finally invested some resources in housing. At the urging of a broad coalition of housing interests, including the Indiana Apartment Association, Indiana Builders Association, Indiana Association of Realtors, Cook Medical Group, Habitat for Humanity, and others, the Indiana Legislature made a \$75M investment over two years in housing, with promises to fund the program for 25 years, that should have positive results generations.

HEA 1005 was considered an agenda bill for the Indiana House Republican Caucus. Speaker Todd Huston (R-Fishers) tasked former homebuilder and Representative Doug Miller (R – Elkhart) with shepherding a bill that would create a revolving loan fund to pay for public infrastructure supporting any type of housing development. Public infrastructure could include roads, sidewalks, utility lines or pipes, broadband, and more. The loan program is administered by the Indiana Housing and Community Development Authority (IHCDA) and offers loans to municipalities that apply. The majority of the fund (70%) is prioritized towards communities with a population of less than 50,000 and 30% of the funding can be used in any

municipality. The intent of the legislature is fund the program for the next 25 years while also reinvesting the interest and penalties that could accumulate in the fund.

This bill passed unanimously in the House but was amended in the Senate to include residential tax incremental financing (TIF) reform to allow all communities to utilize this funding tool for housing. A handful of republicans and democrats oppose any expansions of TIF, arguing that funds captured by this mechanism withhold critical funding for schools and local governments. Despite that opposition the bill cleared the Senate and passed in the House on concurrence overwhelmingly. On May 4, Governor Eric Holcomb signed HEA 1005 into law, effective July 1.

IAA proudly supported this bill and greatly appreciates the work of our coalition of housing and business interests. Over the last few years, IAA has heard increasingly from members that any funding that is available for multifamily developers can be the difference in making critical housing projects feasible, especially as financing costs have increased. IAA hopes that this program will aid the industry and that the success of this program will inspire the legislature to continue to invest additional dollars in housing.



*Brian Spaulding (second from right) attends bill signing of HEA 1005 along with coalition partners and authors of legislation.*

*IAA Secures Property Tax Assessment Transparency and Fairness; Clarifies Rental Inspections in HEA 1454*

HEA 1454 started as the agency bill for the state's Department of Local Government Finance (DLGF). However, as the bill progressed throughout the legislative process, it quickly became known by the legislature and lobbyists in the hallway as the "Christmas Tree Bill," offering everyone a gift. In all, nearly 75 provisions unrelated to the original bill were included, making the bill larger than the state's budget by nearly 20 pages.

IAA secured three major provisions in the bill that provide transparency and fairness in the property tax appeals process. Additionally, IAA was able to get House Republicans to add language into the bill to clarify third-party rental inspections, after some issues in Clarksville.

Last year, in HEA 1260, the DLGF bill contained some language that eroded taxpayer transparency. At the time, DLGF represented that it was removing "duplicative language" in the code, but the reality was that the language eliminated an assessor's obligation to detail changes made to the underlying property characteristics to the property tax record card. In plain English, if an assessor modified the age of the property (which should never change) or the grade of the property, the assessor no longer had to note that on a property tax record card, forcing taxpayers to compare each year's property record card to find the changes. IAA corrected that omission and added the requirement into statute that assessors must detail changes to underlying property characteristics on the property tax record card.

IAA also secured language that will help hold assessors accountable for assessing multifamily rental properties using the lowest of the three means: sales, income, or cost (replacement cost). Over the last few years, IAA has heard from property owners, their tax consultants, and lawyers representing the industry that assessors chase sales and manipulate property assessments to reflect market prices while also ignoring Indiana's unique multifamily rental

property statute. In fact, in the DLFG manual explaining how to assess properties, there is zero mention of our unique assessing statute, which has resulted in incorrect assessments for years.

IAA was able to include some incredibly favorable language that forced assessors to prove property values were substantially correct or within 5% of the value using the lowest of the three means. Failure by the assessor to meet that burden shifted the property assessment to the previous year's assessed value or higher if the taxpayer argued a higher value. Unfortunately, despite that language passing both chambers of the legislature, the bill's author, Sen. Eric Bassler (R – Washington), along with DLGF, forced that language to be removed during negotiations between the House and the Senate bill authors. However, IAA was able to obtain some favorable compromise language.

The compromise language requires the assessor to assess and disclose valuations for all three means of assessment annually, using a new form created by DLGF. A property owner can avoid an annual reassessment by agreeing to an assessment method with the assessor in advance. Additionally, the assessor has the burden of proof to establish the assessment is correct and that the assessed value is the lowest value of the three approaches. Most importantly, the language states that for the cost approach, the assessor must use DLGF's cost tables without modifiers, adjustments, or other trending factors that are used by local assessors to trend values closer to sales.

According to tax consultants and attorneys, this language is a huge victory for the multifamily housing industry and should create a fairer playing field when negotiating with assessors and their vendors.

IAA would like to thank Kane and

Company and Brent Auberry of Faegre Drinker Biddle & Reath, LLP for their technical expertise in helping us to address this issue.

**(f) Notwithstanding IC 6-1.1-4-4.5, for assessment dates beginning after December 31, 2023, the county assessor or township assessor making the assessment shall perform an assessment of property qualifying under subsection (a) annually, and for each assessment year, perform a valuation of the property qualifying under subsection (a) using each of the appraisal approaches in subsection (a)(1) through (a)(3) and annually report to the taxpayer each of the values under those approaches as determined by the assessor on a form as prescribed under subsection (i). The assessor shall use the department cost schedules without modifiers, adjustments, or other trending factors.**

**(g) The county assessor or township assessor making the assessment of property qualifying under subsection (a) has the burden of proof to establish that the assessment is correct and that the assessed value is the lowest value of those determined using the three (3) appraisal approaches performed by the county assessor or township assessor regardless of the percentage change in the assessed value.**

**(h) Upon request of the taxpayer, the county assessor or township assessor making the assessment shall provide an explanation to the taxpayer concerning how the assessed value of the property was calculated.**

**(i) The department shall prescribe a specific form for property qualifying under subsection (a).**

**HEA 1454 — CC 1**



Finally, IAA was able to include language clarifying third-party rental inspections into HEA 1454. Several years ago, IAA included in statute that multifamily property owners could obtain a third-party inspection to satisfy the requirements of a local rental inspection program established after July 1, 1984. A property owner can use a government inspection via HUD or IHCD; a bank or insurance inspection; or hire an independent architect or professional engineer to conduct an inspection and issue a written report. IC 36-1-20-4.1 explicitly details what must be contained in that report.

Historically, after inspecting a random sample of units, property owners would submit a written report to a local governments' inspection program without issue. Rarely did a third-party inspector inspect every unit in a rental unit community. HUD properties who receive regular REAC inspections (or NSPIRE inspection coming October 1, 2023) do not inspect every unit. Instead, inspectors select a random scientific sample size that results in a 90% confidence level within a 6% standard of error that the property meets habitability standards.

Given that historical context, IAA was shocked when the Town of Clarksville demanded that third-party inspections inspect every single unit of a rental unit community. When Clarksville refused to work with IAA, we were given no option but to explicitly clarify in statute that third-party rental inspections must go through a random and equal sample size to HUD properties. If this standard is acceptable for the federal government, which has distributed billions of dollars in taxpayer funds for housing assistance programs since 1995, then it should be sufficient for local governments' rental inspection programs. IAA was pleased and grateful to House Republicans who accommodated our request to include this language in HEA 1454, which becomes effective July 1, 2023.

Overall, IAA had a very successful legislative session, despite a setback slipped into the budget in the eleventh hour (see Lynne's Column for more). IAA is optimistic that the language included in HEA 1454 will give leverage to property owners to secure fair assessments and lower property tax bills.



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*IAA Reforms State's Code Review Process; Adds Multifamily Representative to Commission*

In June 2021, the Fire Prevention and Building Safety Commission (FPBSC) established priorities and the order of code updates for Indiana's building codes and standards. The commission decided that the Indiana Electrical Code, Building Code, Existing Building Code, Fire Code, Fuel Gas Code, Mechanical Code, Plumbing Code, and the Energy Conservation Code should all be updated. In late 2022, after the completion of the review of the Indiana Electrical Code, which took 6 months, the Commission decided to speed up the code review process to roughly one code per month, with the goal to begin rulemaking on all the updated codes by the conclusion of 2023. This would essentially mean the commission would be adopting model codes without any amendments, a practice that has never occurred in Indiana.

IAA and other building interests were alarmed at the new speed the commission was attempting to update codes, given the financial impact on housing with all codes being updated simultaneously. In the fall of 2022, IAA approached Governor Holcomb's office and the Department of Homeland Security (DHS), which both have jurisdiction over the commission. Sadly, despite our warnings regarding costs and our concerns about our voices being silenced, IAA was informed the administration's hands were tied by existing law. Thus, IAA and other building interests heard loudly that the law needed changed.

IAA worked with the Indiana Builders Association (IBA) and a code consultant to draft HB 1575. As introduced, this bill established a Residential Building Commission (RBC) and an Indiana Dwelling Code that would create a completely separate group of codes governing residential occupancies in Indiana. The idea was the FPBSC would complete an initial review and update building codes and then the RBC would conduct its own independent review to amend Indiana's codes. Those amendments would be published in the Indiana Dwelling Code.

HB 1575, as introduced, passed the House Government and Regulatory Affairs Committee by a vote of 9-1, even though numerous national and state interest groups declared safety would be compromised by giving the housing industry representation in the process when reviewing building codes and standards. Upon committee passage, the Holcomb Administration and DHS suddenly became interested in negotiating a compromise and became even more inspired after the bill gained bipartisan support in the House when it passed 72-25.

The Holcomb Administration feared that two commissions might be confusing. On three occasions, IAA, IBA, bill authors Rep. Tim

O'Brien (R – Evansville) and Rep. Doug Miller (R – Elkhart), and the administration negotiated. During those negotiations, we agreed to forego forming a brand new RBC and instead reform the current FPBSC to 12 members and gave balanced representation between building interests and safety-oriented interests. The new commission will include a fire official, architect, professional engineer, commercial or residential remodeler, low-income developer, a member of the Indiana Association of Building Officials, a member of the Associated Builders and Contractors of Indiana/Kentucky, a member of the Indiana Apartment Association, a member of the Indiana Builders Association, and a real estate broker. To adopt new building codes and standards, an affirmative vote of 2/3rds of the members must be reached, which creates an environment for bargaining and compromise.

Additionally, we agreed to review a maximum of three codes per year, unless an emergency, conflict, or exigent circumstance exists. Any updated building codes will not be effective until 180 days after rulemaking. IAA was also able to add into the bill that local governments cannot have their own building codes and standards. If a local government wants to modify the statewide code or modify something based on a local condition, it can once per year petition the commission for consideration to modify the statewide code. Thus, building trades and design professionals will only have to look at the statewide building codes when designing and constructing buildings.

Despite negotiating all of this in good faith, prior to the Senate Local Government Committee hearing, IAA heard DHS was working against the bill behind the scenes and trying to prohibit its hearing. However, despite their efforts, IAA amended the bill to include the language we agreed to with the Administration after learning the Governor's office was poised to veto the bill as it passed the House. The amended bill received a hearing and passed committee 7-3, despite several members expressing concerns over restricting local governments. In the Senate, after vigorous debate and opposition among democrats, the bill passed 33-15. The House ultimately concurred with the Senate's changes 67-27, where IAA picked up the support of two additional democrats.

On May 1, the bill was ultimately signed into law, despite rumors the Holcomb Administration and DHS still disliked the bill. Beginning August 1, the FPBSC will include an equal voice for building interests. IAA believes this is a huge victory for the industry and thanks those members who provided input throughout the process.



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## Fair Housing Best Practices for Prospect Tours: Ensuring Compliance

*This article was prepared by the Fair Housing Institute*

As a leasing professional, conducting prospect tours is an everyday task that requires you to be mindful of fair housing laws. Discrimination in housing is illegal and can result in severe legal consequences. Therefore, implementing fair housing best practices can help ensure that you and your team remain compliant at all times.

### Consistent Tour Policy

Having a consistent policy on how and when tours are offered is essential to avoid potential fair housing violations. Discrimination can occur if one prospect is offered a tour while another is not based on their protected class. Another thing to keep in mind is what is shown on the tour.

For example, you shouldn't give a tour of the grounds, amenities, and units to Prospect A and then only show the grounds and units to Prospect B. Any disparity in how you conduct your tours is leaving you open for potential fair housing complaints.

### Documentation

Why is documentation a critical part of prospect tours? Consider the following scenario:

Several tours have been scheduled, but the leasing agent was called away before they could complete them. What should you do?

We all know that a leasing office can be incredibly busy at times and potentially short-staffed. Documentation is crucial when situations arise and you must reschedule a tour or have another leasing agent step in. Ensure that all information about what happened, why it happened, and what alternatives were offered are clearly noted. If there is ever a question as to why some tours were done and not others, you will have clear documentation to show precisely what happened.

### Unit Tours

Having a policy regarding which units are shown is also essential. Of course, we want to show potential residents what we think will interest them based on their guest card or conversations you have had. However, if leasing agents offer different units to different prospects, the reasons for showing those particular units must be noted to avoid any appearance of discrimination or illegal steering.

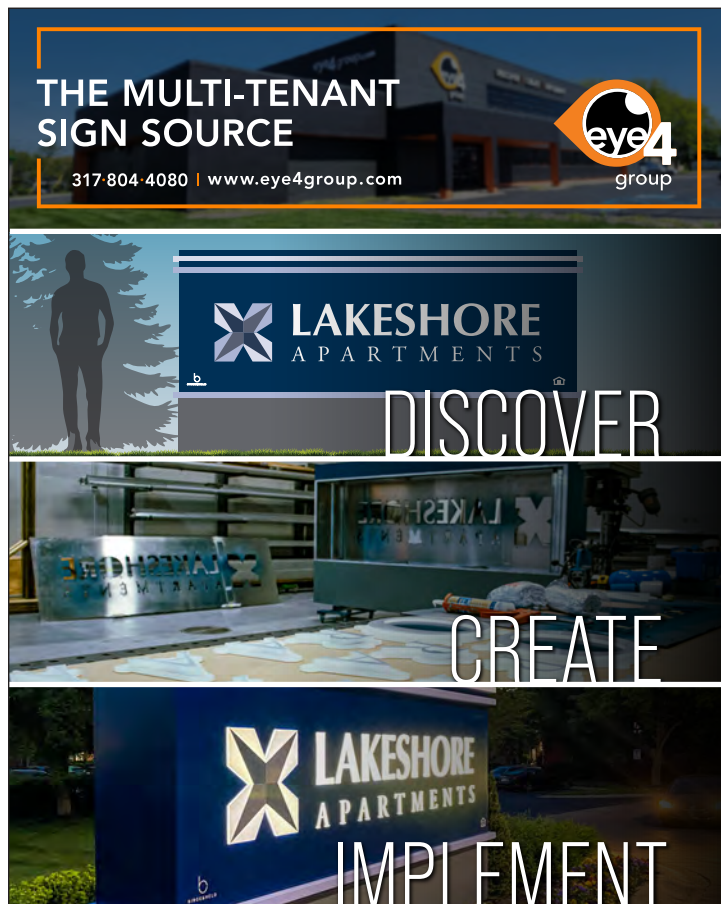
### Non-Accessible Units and Media Accessibility

Showing units that are on a second floor or higher to a disabled prospect can prove to be a challenge, notably if the building happens to be older and does not have elevators. You cannot just shrug your shoulders and only show units on the first floor, as this is blatant discrimination.

Offering an alternative tour is crucial. A video or picture book can be used as a substitute as long as it provides a complete description of the unit. Additionally, when using videos or offering virtual tours, it is crucial to ensure that the media is accessible to people with visual or auditory impairments. All media must include full-text descriptions and audio components.

### Final Thoughts

Implementing fair housing best practices in your leasing operations is essential. This article reviewed four fundamental areas that need to be regularly reviewed for fair housing compliance. With a little bit of thought, thorough documentation, and a clear tour policy, you can avoid potential fair housing problems. And as always, remember: fair housing training for all staff is critical to help everyone stay compliant.



# Outing the Fraud Economy

*How your customers have emerged as a creeping threat to your business*

By Daniel Berlind, CEO of Snappt and President of Berlind Properties

Almost overnight, fraud has become a pervasive – and even celebrated – part of our daily lives.

On a new Netflix program, contestants are rewarded not for knowing the right answer, but for being able to convince other players their answer is right, especially when it's wrong. The New York Times described it as a “post-truth” game show that embodies our times by showing us what it's good to be good at: deceiving others.

In business, deception and fraud have risen to crisis levels. Fraud was already burgeoning pre-COVID-19. But since the pandemic, it has mushroomed, costing businesses \$5.4 trillion globally, more than twice the gross domestic product of the UK. Global consultancy Crowe has called fraud “the last great unreduced business cost.”

In the U.S., reports of fraud, identity theft and other deceptions spiked by 67% between 2019 and 2021, according to the Federal

Trade Commission. The grifts range from cyber and payment fraud to lying on bank loan applications, and more recently, supply chain and ESG reporting fraud, according to PwC.

## The Rise of the Fraud Economy

While many of these schemes are orchestrated by professional criminals, evidence suggests an increasing number of these perpetrators are casual practitioners of deception.

For example, Lexis Nexis found over 30,000 fraud rings engaged in forgery, filing false claims, identity theft, identity manipulation and fake checks. Many groups comprised family members or circles of friends who collaborated to improve their collective fraud success rates.

A cottage industry has sprung up online to help consumers buy fabricated documents, including bogus paystubs and bank statements, to fraudulently qualify for loans, mortgages, car purchases and apartment leases, among other transactions.

These businesses claim to simply provide the documents as “novelties,” and explicitly state they're not distributing their wares to aid and abet illegal activity.

I first learned about this when, after retiring from professional baseball, I invested in a small portfolio of apartments in Los Angeles. Almost immediately, my partner and I saw bogus pay documents submitted with lease applications.

We thought there had to be a better way.

Your own personal fraud coach

You can see crowd-sourced, digital fraud collaboration firsthand with a simple Google search.

For example, a Youtube video from a fraud “coach” who warned her followers to steer clear of apartment communities that use my technology firm's fraud detection software, so as not to get caught trying to falsify their income on rental applications with the help of fake paystubs.

The host of the video advises her followers that she's not presenting her information to help them commit a crime. “We are not here to help you defraud the banks, government or creditors in any way,” she says. “We are just educating.”

She then goes on to “teach” watchers how to avoid getting caught – namely by advising them get someone else to commit

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fraud on their behalf by adding the user's name to a legitimate company's payroll without actually being an employee.

### *Cause and Effect*

The reasons behind the growth of the fraud economy are multifaceted. They include increased digitization in all walks of life normalizing a sense of anonymity – and the inherent lack of accountability that goes with it – in our interactions with others.

The hardship of many frontline workers during the pandemic, mixed with soaring inflation, are additional factors. Eroding trust in institutions and rising dissatisfaction with public life, as well as a surge in crime may also contribute.

Regardless of its cause, the result is a growing laissez faire attitude -- if not outright acceptance -- toward less-than-honest behavior on the part of consumers, particularly when it comes to interacting with businesses online.

Who hasn't fudged the reason for an online return in order to dodge reverse shipping charges? Or simply not said anything when an online purchase was bungled in their favor, perhaps by two items showing up instead of one?

While those examples seem innocuous, a portion of today's consumers are increasingly justifying blatantly fraudulent behavior. Just look at a survey of renters that my company commissioned during the pandemic to measure apartment application fraud.

When asked their view of altering financial documents to apply for an apartment, nearly a quarter – 24% -- said doing so was either "somewhat" or "extremely" acceptable. But what's even more telling was the response of property managers themselves: one-sixth of them, or 16%, had the same view.

That acceptance among apartment pros, whose livelihood depends on accurately vetting applicants so they don't incur a \$7,500 expense for a preventable eviction down the road, is a headscratcher.

It may simply come from how often landlords see fraud today – 85% now report being targeted by application fraudsters, compared to 66% pre-pandemic.

While it's an area I'm intimately familiar with, it's also just a small snapshot of the growing prevalence of fraud schemes customers use to target businesses today.

The good news is, companies can combat this trend.

Educating teams to be on the lookout for fraud is the first step. Training them to request more documentation, and how to spot a fake, is another.

You can also align your employees' financial incentives to stop fraud before it starts by tying incentives to post-transaction outcomes, such as qualified sales metrics.

Finally, providing your employees digital and AI tools to mount a defense can provides the resources they need to win this fight.

While the trend is troubling, business owners can take a stand against the growing acceptance and legitimization of "post-truth" consumerism.

*Daniel Berling is a real estate executive and the CEO of proptech firm Snappt, which instantly flags financial fraud in the multifamily housing industry.*



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## 2023 Refrigerant Update and What to Expect

By Greg Potts, Proctor for Esco Institute

I'm sure you have heard or read about additional updates regarding the EPA's continued phase down of Global Warming Potential (GWP) refrigerants. This article will address the phase down of R-410A and the new A2L refrigerants.

R-410A is being phased DOWN, not phased OUT like we saw with R-22.

On January 1, 2022, the US Environmental Protection Agency (EPA) began the first part of the HFC phase down which was 10% based on the American Innovation & Manufacturing (AIM) Act, which stipulates the transition from harmful hydrofluorocarbons to more environmentally friendly alternatives in the United States. Manufactures of R-410A will have to adhere to the following date and reduction rates to be compliant with the phasedown mandate.

- January 1, 2022 by 10%
- January 1, 2024 by 40%



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- January 1, 2029 by 70%
- January 1, 2034 by 80%
- January 1, 2035 by 85%

As you can see, it will be several years to complete the phasedown. During this time, refrigerant and equipment manufacturers along with consumers can formulate plans on how to introduce new replacement refrigerants into the market. Obviously, the biggest impact on the multi-family housing industry will be "comfort cooling" equipment.

New comfort cooling equipment will utilize A2L refrigerants, which are a class of refrigerants that have higher efficiency and lower GWP (Global Warming Potential) of 750 or less and are slightly flammable. Global Warming Potential (GWP) is used to measure a refrigerant's environmental impact on greenhouse gases. CO<sub>2</sub> is used as the baseline. The two foremost replacements A2L refrigerants are R-32 and R-454B. \*These new refrigerants CANNOT be used in existing R-410A equipment.

In regards to existing R-410A systems, R-410A is still going to be manufactured through 2036, meaning it will be available for many years. R-410A is NOT being banned, but you will see limited production. Each year through 2036, the amount being produced will decrease which means more than likely the price will increase as the supply decreases.

You do not have to replace any existing R-410A equipment because of the phasedown as long as you still have R-410A refrigerant on hand for servicing and repair. A well-maintained AC system will last 15 to 20 years. Moving forward, Recovery, Recycling and Reclaiming of your R-410A could have a significant impact on your HVAC budgets for years to come.

### R-32

- Readily available (R32 is used in the manufacture of R410A which is a blend of 50% R32 & 50% R125)
- R-32 is currently used with other refrigerant gases to make R-410A.

**Note:** R-32 is technically listed as flammable. Studies have shown, however, that the conditions needed to ignite R-32 are so specific and extremely unlikely to exist and as such it is not



something concerning in the vast majority of residential or commercial applications.

**Disadvantages:** Different from R22 and R410A, the R32 is slightly flammable. But combustion will not occur unless three critical conditions are met, refrigerant concentration, constant oxygen, and an ignition source. In real practice, it's hard to meet all the combustion conditions.

### R-454B

- Higher efficiency for heating than R-32
- Requires less refrigerant by 5-10% than equipment using R-410a uses
- R-454B has a lower GWP (Global Warming Potential) at 465-GWP than does R-32 at 675-GWP
- The close operating pressures and temperatures of R-454B when compared with R-410A allows manufacturers to build equipment using parameters that are very close to that of equipment that uses R-410A.

**Note:** R-454B is technically listed as flammable much like R-32, although to a lesser degree. Studies have shown, however, that the conditions needed to ignite R-454B are likewise so specific and extremely unlikely to exist and as such it is not something concerning in the vast majority of residential or commercial applications.



As A2Ls are phased in, training is recommended so the employee understands how to handle these refrigerants since they are potentially more flammable. A review regarding refrigerant recovery is also something to consider. Additional equipment may need to be purchased such as HVAC gauges that read A2L refrigerants and recovery equipment specific for A2L refrigerants.

As of now, MO99 (R-438-A) and NU22 (R-422-B) are not being phased out. They are still a viable option for R-22 units as a replacement refrigerant.

It is not recommended to mix refrigerants. Mixed refrigerants can cause increased system pressures and temperatures changing them for the worse. This can result in ineffective compressor cooling and possible compressor damage, ineffective cooling, and metering device malfunction. Different types of refrigerants are not meant to be mixed and should be avoided. The refrigerant should be recovered and replaced and not “topped” off.

### To Recap:

- January 2022 – R-410A refrigerant phase down begins and ends 2036. R-410A will be available through 2036.
- January 2025 – A2L refrigerants will be in NEW condensers (R-32 and R-454B). You are NOT required to purchase new condensers as long as your existing systems work and you have either R-22 or R-410A refrigerant available.
- A2L refrigerants are more flammable but more than likely will not explode if used correctly
- Training is recommended pertaining to the A2L refrigerants
- New recovery equipment and gauges may need to be ordered
- MO99 (R-438-A) and NU22 (R-422-B) are still in production and a viable replacement for existing R-22 units
- Mixing of refrigerants is strongly discouraged as it can potentially shorten the life of the condensing unit



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### CAPS

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Improve your: employee performance and retention; communications, ethics, and emotional intelligence; annual operating budgets and owner performance objectives; property and portfolio results; managing risk through inspections, follow-up procedures, and incident responses; AND MUCH MORE!

To earn the CAPS certification, students must complete the coursework, and pass the exam within six months of declaring candidacy. Minimum experience requirement of 24 months in multi-site property management or be a CAM, ARM, RAM credential holder in good standing.



**DATES:** 7/11 – 7/13

**INSTRUCTOR:** Pam Pederson

**COST:** \$1,550

### EPA Section 608 Certification

EPA regulations under Section 608 of the Clean Air Act require that technicians who maintain, service, repair, or dispose of equipment that could release refrigerants into the atmosphere must be certified. Enroll in this course to comply with regulations essential for supporting an apartment community.



Passing the **CORE** section of the exam (covering topics such as Montreal Protocol, Clean Air Act, refrigerant characteristics, and safety) is required to obtain one of the four levels of certifications:

**TYPE I:** Persons who maintain, service, or repair small appliances must be certified as a Type I technician.

**TYPE II:** Persons who maintain, service, repair, or dispose of high or very high-pressure appliances, except small appliances and motor vehicle air condition systems, must be certified as a Type II technician.

**TYPE III:** Persons who maintain, service, repair, or dispose of low-pressure appliances must be certified as a Type III technician.

PASS ALL FOUR SECTIONS AND RECEIVE YOUR UNIVERSAL CERTIFICATION

**UNIVERSAL:** Persons who maintain, service, or repair both low and high-pressure equipment and small appliances must be certified as a Universal Technician.

**EPA/CFC TEST PREP DATE\*:** 7/13

**INSTRUCTOR:** Joe Powell

**COST:** \$190

\*The CFC Universal Exam Prep course teaches you the dates, terminology, rules, and regulations. Hence, knowing this is necessary to be prepared to take and pass the EPA/CFC Section 608 Certification Exam. **This mandatory certification is necessary to be able to purchase and handle refrigerants.** Students will select a date they wish to take the certification exam following the completion of a test prep course.

### CAMT

Earning a CAMT designation validates a level of professional knowledge, enhances reputation and credibility, boosts confidence, and leads to respect. Earn career advancement by expanding knowledge in fair housing, environmental responsibility, regulatory compliance and inspections, preventative techniques, communication, and growing practical skills in plumbing, HVAC, electrical, paint, and more.

CAMT candidates must complete the classroom and virtual coursework then pass the exam within six months of declaring candidacy. Minimum experience requirement is 12 months of apartment or rental housing maintenance work. (This can be obtained while taking the course, you will receive a provisional certificate until this requirement is met)

**DATES:** 9/7, 9/14, 9/21, 9/28, 10/12, 11/2, 11/7 – 11/8 (hands-on)

**INSTRUCTOR:** Tom Whetsel

**COST:** \$1090 [Full Course], or \$525 [2-day HVAC Module], or \$320 Per Session



### CAM SLAM

CAM SLAM is the same course as CAM, just faster! Earning a CAM designation allows mid-level staff to demonstrate that they have the knowledge and ability to manage an apartment community and achieve owners' investment goals. This course is recommended for multifamily professionals with strong financial backgrounds and those ready to take the next step in their careers. Course topics include occupancy rates, comprehensive marketing plans, the equitable treatment of current and potential residents, property inspections, preventive maintenance programs, accounting principles and practices and maximizing net income. CAM candidates must complete the coursework and exam within 6 months of declaring candidacy. A minimum of 12 months of onsite property management experience is required.



**DATES:** October 9-13

**INSTRUCTOR:** Pam Pederson

**COST:** \$1290

Information coming soon on these 2024 classes:

**CALP • Virtual Leasing Professional (VLP)**  
**SAL Leadership Program • CPO**



# Upcoming Free Education

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## Maintenance Fair Housing

**DATE:** 7/18/2023

**TIME:** 10:00am – 12:00pm

**INSTRUCTOR:** Gavin Greene, Director of Management Systems with Flaherty & Collins Properties

### ZOOM WEBINAR

It's likely the onsite maintenance professionals interact the most with residents completing work orders and helping with grounds around the community. It is essential maintenance professionals are prepared and aware of state and federal fair housing laws when interacting with residents! Let's cut the legal jargon and get to need-to-know of fair housing for maintenance professionals.

## 5 Step Decision Making Formula

**DATE:** 7/27/2023

**TIME:** 9:00am – 10:30am

**INSTRUCTOR:** Shanenn Bryant, Director of Learning & Development at Buckingham Companies

**HYBRID:** Can attend in person OR via Zoom

With the ever-growing feelings of overwhelm, clear decision-making is the ultimate form of self-care. This course will bring clarity and actionable steps to determine what problem you are trying to solve and how to make the decisions, through critical thinking, to solve any workplace problem.

## How to Approach Difficult Conversations

**DATE:** 8/22/2023

**TIME:** 10:00am – 11:00am

**INSTRUCTOR:** Christie Upp, Director of Training at AMP Residential

### ZOOM WEBINAR

In the multifamily industry, we face many instances where an uncomfortable issue must be addressed. This course will cover how to approach those conversations for the best outcome.

## Fair Housing Trends

**DATE:** 8/29/2023

**TIME:** 1:00pm – 2:00pm

**INSTRUCTOR:** Brian Adkins, Attorney at Buchalter's Real Estate Practice

### ZOOM WEBINAR

Plaintiff's lawyers are always looking for opportunities to target businesses with expensive lawsuits and settlement demands. In this course, Attorney Brian Adkins, based in California, has built a practice defending property owners and will review the hot-button issues and trends impacting property owners nationwide. He will also cover some issues California property owners face, which inevitably find their way to the Hoosier state.



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**CONGRATULATIONS to IAA members who earned a new designation between March 20 and May 19, 2023!**



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Buckingham Companies

**Dara Grady,**  
Continental Management LLC

**Laura Garrison,**  
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**Charlotte Wilson,**  
RealAmerica Management, LLC

**Stacia Self,**  
Birge & Held Asset Management

**Donald Lamberson,**  
Edward Rose & Sons

**Victor Buquer,**  
KPM Multifamily LLC.

**Cassie Payonk,**  
Van Rooy Properties

**Ja'Van Smith,**  
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**Makenzie Garcia,**  
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**Jennifer Harkcom,**  
NTS Development Co.

**Courtney Brown,**  
Flaherty & Collins Properties

**Haleigh Cunningham,**  
Van Rooy Properties

**Taylor Moulton,**  
Flaherty & Collins Properties



**Sean Saunders Sr,**  
Real Estate Equities

## Michelle Norman Named SAL Visionary Leadership Program Scholarship Winner

IAA recently announced its 2023 SAL Visionary Leadership Program scholarship winner, Michelle Norman. Michelle is a Community Manager with J.C. Hart, where she has worked for over nine years. She received her CAM certification in 2019. She is a passionate leader, committed to continuing her education and coaching her team members to excel in their roles. We cannot wait to see Michelle's growth through the SAL program!



SAL Scholarship winner Norman



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# IAA Kicks off Membership Drive: JUNE 1 – AUGUST 31

IAA's Industry Insights and Ambassador Committee kicked off a Membership Drive between June 1 and August 31. The membership drive focuses on multifamily management companies and suppliers who provide services and products to the multifamily housing industry. If you know of a management company or a supplier who is not a member, there has never been a better time to encourage them to join because you could earn \$500 CASH!!!

For each management company or supplier you recruit, your name is entered into a drawing for the prize money. This year, we're once again drawing TWO names!

## CONTEST DETAILS:

### Supplier Recruitment

Member Referral	1 Entry
Member Joined	3 Entries
Member Joined and MMC Booth Purchased	5 Entries

### Management Company Recruitment

Member Referral	1 Entry
Member Joined 0-299 Units	3 Entries
Member Joined 300 + Units	5 Entries

*You are already a member, and you know why it is important to join the Indiana Apartment Association. You, and your team, take advantage of the benefits. Now it is time to tell non-members to join!*

## HOW TO PARTICPATE:

### REFER A MEMBER

- Refer a supplier member or management company by sending an email to [Jordan@iaaonline.net](mailto:Jordan@iaaonline.net)!

### RECRUIT A MEMBER

- Go to [IAAonline.net/membership](http://IAAonline.net/membership)
- Print out a membership application
- Give to prospective member to fill out the application
- Make sure your name is listed in the referral line on the application
- Recruit a new member and send the completed application to [iaaonline.net](http://iaaonline.net)

***We appreciate your help and tireless promotion of the Indiana Apartment Association – which directly supports the multifamily housing industry.***

***Among those already competing*** are our amazing Ambassador Committee, comprised of Chair **Tim Hentrup**, Englert Mgmt Corp.; **Liz Taylor**, GreenWay Waste & Recycling; **Todd Moretto**, Carpetbaggers, Inc.; **Scott Troglen**, Ferguson Facilities Supply; **Sarah Ransom**, MultiVersity Housing Partners; **Ryan Skinner**, The Justus Companies; **Matt Hicks**, ONiT Painting; **Kyle Sharpe**, First Onsite Restoration; **Mark Pennings**, ALN Apartment Data; **John Tarr**, Garrett Residential; **Hayley Vandermark**, Thompson Thrift Residential; **Heidi Rooney**, Leonardo247, Inc.; **Eric Bushue**, Cox Roofing; **Beth Roberts**, Englert Mgmt Corp.; and **Ali Kaid**, ChekpointID

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If you are doing business with vendors who are not members of IAA, or who have not renewed their membership, please consider using a member or encourage them to join today!



## Welcome New Supplier Members

IAA values the membership of Supplier Members and welcomes new members who provide products, services and expertise in the multifamily industry. Please consider using one of these new members for your next bid.

**Don't forget to let them know you were referred by IAA!**



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# Maintenance Mania

Maintenance professionals from across the state gathered once again for the 2023 Maintenance Mania competition. Maintenance Mania is an action-packed competition dedicated to the hardworking maintenance staff in the multifamily industry. This year's competition had over 135 maintenance professionals participate.

The competitors raced against the clock to complete seven industry-related challenges, including AO Smith water heater installation, Frigidaire icemaker installation, Halstead click lock plank installation, Kidde fire & carbon monoxide safety installation, Kwikset key control deadbolt test, Pfister drain installation, and a race car competition with cars made from at least three maintenance supply parts.

## Congratulations to the 2023 winners:

### Overall Winners

- 1st Place Overall:  
Luis Castillo, Van Rooy Properties
- 2nd Place Overall:  
David Garcia, Van Rooy Properties
- 3rd Place Overall:  
Israel Cruz, Van Rooy Properties



Overall winners (left to right) Luis Castillo, David Garcia, and Israel Cruz

### AO Smith Water Heater Installation

- 1st Place: Eduardo Cervantes, Van Rooy Properties
- 2nd Place: Eric Poole, Gene B. Glick Company, Inc.
- 3rd Place: Daniel Moss, Gene B. Glick Company, Inc.

### Frigidaire Icemaker Installation

- 1st Place: Eduardo Crisostomo, Van Rooy Properties
- 2nd Place: Israel Cruz, Van Rooy Properties
- 3rd Place: Eduardo Cervantes, Van Rooy Properties

### Halstead Click Lock Plank Installation

- 1st Place: Daniel Moss, Gene B. Glick Company, Inc.
- 2nd Place: Israel Cruz, Van Rooy Properties
- 3rd Place: Eric Poole, Gene B. Glick Company, Inc.

### Kidde Fire & Carbon Monoxide Safety Installation

- 1st Place: Daniel Moss, Gene B. Glick Company, Inc.
- 2nd Place: Jhonny Rivera, Van Rooy Properties
- 3rd Place: Raymond Raines, Barrett & Stokely, Inc.



Competitors lining up for practice before the competition.

### Kwikset Key Control Deadbolt Test

- 1st Place: Luis Castillo, Van Rooy Properties
- 2nd Place: JC Oropeza, Van Rooy Properties
- 3rd Place: Eric Poole, Gene B. Glick Company, Inc.

### Pfister Drain Installation

- 1st Place: Luis Castillo, Van Rooy Properties
- 2nd Place: David Garcia, Van Rooy Properties
- 3rd Place: Angel Herrera, Van Rooy Properties

### Race Car Competition

- 1st Place: Angel Herrera, Van Rooy Properties
- 2nd Place: John Bryan, Van Rooy Properties
- 3rd Place: Neptali Hernandez, Van Rooy Properties

### Best Use of Maintenance Supplies

- Ben Fryer, Fairlawn Real Estate

### People's Choice Award

- Jimmy Mattingly, Lauth Communities



Participant competes in Kwikset Key Control Deadbolt Test.



Participant competes in Frigidaire Icemaker Installation.



On June 7th, one of our winners competed head-to-head for the National Championship at NAA's Apartmentalize. Congratulations to **Luis Castillo with Van Rooy Properties** for qualifying in the wildcard rookie spot! It was great to see Luis take home two 1st place times at Apartmentalize. Luis placed in the Race Car Competition, Icemaker Installation, and Fire & Minoxide Safety Installation.

Alongside the competition, IAA promoted the 2023 Maintenance Appreciation Awards. The Awards recognize excellence and leadership in the maintenance sector of the multifamily industry. These awards celebrate the hard work these individuals do daily. Award nominations were open to any maintenance staff.

### ***Congratulations to the 2023 Maintenance Appreciation Award Winners:***

#### ***Best Maintenance Team***

This year's Best Maintenance Team is the team at 360 Market Square. This maintenance team does their best to show residents how much they appreciate them every day by leaving thank you notes inside resident homes, while also showing appreciation for the furry family members by leaving treats inside for pets. The 360 Market Square maintenance team comes to work every day with a positive attitude and is always willing to grow as they learn new skills!

#### ***Maintenance Above & Beyond***

Daniel Winston with TWG Management is our Maintenance Above & Beyond winner. For the last three years, Daniel has been responsible for 254 Section 42 units by himself, all while being on call each and every day. He has been known to go above and beyond at the property and never hesitates to help with snow removal or trash pickup when needed. Daniel is described as a "property manager's dream," and is not only knowledgeable, but also cooperative and devoted to his property!

#### ***Outstanding Achievement***

This year's Outstanding Achievement award went to Adnan Ali with AION Management. With the help of Adnan, the community has made a complete transformation with work orders going from 180 outstanding orders to just five at any given time and occupancy rising from 60% to 95% due to the help of this year's winner. Through it all, he came into work with a positive and upbeat attitude. The property truly could not have accomplished so much success without Adnan!

#### ***Spirit Award***

The attendees at this event really got into the competitive spirit as well. The following teams showed the best team spirit by dressing up and cheering on their team with unbeatable energy. Congratulations to our 2023 spirit award winners:

**BAM Management; TWG Management**



*Enthusiastic fans cheer on the BAM Management team.*

**Thank you to our sponsors:** All Pro Heating & Air, APCO Supply, Chadwell Supply, CRG Residential, DC Construction Services, Inc., Elite Remediation & Services, Falcon Carpet of Indiana, First Onsite Property Restoration, Gene B. Glick Company, Inc., Hays + Sons Complete Restoration, HD Supply, Holt Construction Group, OpenBox Roofing & Restoration, PPG Paints, Rees Restoration, Sherwin-Williams Company, SRM – ServiceMaster Recovery Management, Surface Connection, Surface Experts of Central Indiana, The Liberty Group



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## Property Bus Tour

IAA hosted the annual Property Bus Tour on May 17. Attendees toured five remarkable apartment communities in the Indianapolis market, with some being brand new properties and some that had been recently renovated.

The bus full of attendees was greeted at the first stop at Parkside at Tarkington by the great staff of Flaherty & Collins Properties. After a quick group photo outside, attendees headed into the leasing office for mimosas and breakfast treats. Everyone then toured the model unit while popping into the amenity spaces along the way. It was great to tour this brand-new property to start our morning!

The next stop on the tour was Historic Marcy Village. We got a warm Van Rooy welcome by the staff members who were waiting outside with a large welcome banner! The tour started in the newly built clubhouse with Chick-fil-a breakfast and then continued outside to the pool deck for drinks. After an introduction, one group of attendees then headed off to view the newly renovated model while the other group toured additional amenities, including the fitness room, grilling and firepit area, a variety of outdoor games and fitness equipment, and a pickleball court.

After a stop back at the IAA office for lunch and networking, we loaded the bus and headed to Zionsville to tour The Alinium of Zionsville, a newly renovated property owned by Birge & Held Asset Management. Attendees enjoyed snacks and beverages in the leasing office before heading out to see the awesome amenities that have been added to the property, such as the increasingly popular golf simulator and puppy porches added to select units.

Next up was Greenview Apartments, just five minutes down the road in Whitestown. The always friendly Birge & Held staff welcomed us to their brand-new property in their impressive leasing office where they offered up drinks, cookies and other snacks. Attendees got



2023's Property Bus Tour Attendees

to see spectacular kitchens and modern appliances and finishes throughout the model. With this property still in the process of adding on additional buildings and units, we know it will be absolutely stunning once 100% complete.

Our last stop of the day was The Gallery Apartments, owned and managed by BAM Management. This newly renovated property was able to showcase its spectacular leasing office, including the expanded fitness center that offers residents the perfect on-site gym. While enjoying their sandwiches and drinks, attendees were also able to check out the beautiful courtyard and fountain, a perfect spot for residents to relax and unwind.

This event truly provided the perfect opportunity for everyone to view unique floor plans, discover new industry trends and amenities, network with other multifamily professionals, and obtain great ideas for future renovations. A huge thank you goes to all of the wonderful properties who volunteered their time to be on this year's Property Bus Tour!

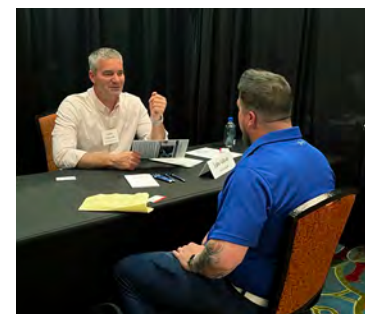
**Thank you to our sponsors:** Hays + Sons Complete Restoration, Valet Living, Eye 4 Group, 5 Star Pest Solutions, GreenWay Waste & Recycling, Zillow Rentals, & Near North Title Group

## Reverse Trade Show

Thank you for joining us for the 2023 Reverse Trade Show Presented by Feazel, Inc. & First Onsite Property Restoration.

On May 4, over 130 IAA vendors gathered for the opportunity to meet and have face-to-face conversations with owners and management executives representing over 102,300 units across the state of Indiana.

This event benefitted the NAAPAC, the bi-partisan political action committee that supports Congressional candidates who represent good government and understand the needs and concerns of the apartment housing industry. By the end of the event, we successfully raised over \$43,500!



Luke Gilliatt, VP of TGM Communities, speaks with vendor at the Reverse Trade Show.

### Thank you to the following management companies who participated:

AION Management  
Barrett & Stokely, Inc.  
Becovic Management  
Group of Indiana  
Birge & Held Asset Management  
Buckingham Companies  
Dominion Realty, Inc.

Edward Rose & Sons  
Englert Mgmt. Corp.  
Flaherty & Collins Properties  
Garrett Residential  
Gene B. Glick Company, Inc.  
Gray Residential  
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### Thank you to our overall sponsors:

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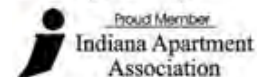
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