AGENDA
PUBLIC HOUSING EXECUTIVE MANAGEMENT
WEB TRAINING

DAY ONE

8:00 Registration
8:30 Welcome and Introductions
8:45 Organizational Overview
  - Overview of Programs – Moving to Work (MTW)
  - Legal Framework of Public Housing
  - The Executive Director, the Board, and Working Well with the Board
  - HUD’s Asset Management Model
  - Organizational Management – Assessing Current Organizational Operations, Culture, and Effectiveness
    - Sample Organizational Effectiveness Tool

The Director
  - The Director’s Role
  - Competencies of the Director and How to Develop Them
  - Director Functions, Competencies Required, and Activities

10:15 Break
10:30 The Director (continued)
  - Managing Yourself and Others – DISC©
  - Job Descriptions – Executive Director and Portfolio Director
  - Supervisory Management – Top Ten Supervisor Tasks and What Your Employees Need to Know
  - Developing Leadership Skills
  - Managing Change

12:00 Lunch (on your own)
DAY ONE (continued)

1:00  Policies and Policy Development
- Required PHA Policies
  - The Consolidated Plan
  - The PHA Plan and Process
  - Capital Fund 5-Year Plan and Process
  - Other Required Policies
- Policies Required in Public Housing
- Policy Checklist

Private Sector Principles in Public Housing Management
- PHA vs. Private Property Management
- Roles of the Asset Manager and Property Manager
- Functions and Competencies of Property Managers
  - Job Description

2:30  Break

2:45  Private Sector Principles in Public Housing (continued)
- Asset Management and Project Management
  - Sample Portfolio and Property Forms
- Risk Management and Insurance
- Marketing Techniques
- Filling Units and Collecting Rent

Finance for the Public Housing Director
- The Operating Subsidy Formula
- Project-Based Subsidy, Budgeting, and Accounting

5:00  End of Day One
AGENDA
PUBLIC HOUSING EXECUTIVE MANAGEMENT
WEB TRAINING

DAY TWO

8:00  Finance for the Public Housing Director (continued)
  • PHA Case Study and the Project’s Budget
  • Understanding Budget Requirements and Terms
    • PUM Calculation and Learning Activities
  • The Budget Process

10:15  Break

10:30  Finance for the Public Housing Director (continued)
  • Paying for Services – Frontline, Shared Resources, Frontline Allocated, and Fee-for-Service
  • Fees Paid by the Project to the COCC – Property Management Fees, Bookkeeping Fees, Asset Management Fees, and Capital Fund Program Management Fees

12:00  Lunch (on your own)

1:00  Finance for the Public Housing Director (continued)
  • Year-End Financial Reporting Overview
  • Capital Fund Program and Budgeting
    • Use of Capital Funds and Operating Funds
  • The Income Statement and Monitoring Budget to Actual
  • The Balance Sheet and Fungibility
  • Basics of Understanding the Audit Report

2:30  Break
AGENDA
PUBLIC HOUSING EXECUTIVE MANAGEMENT
WEB TRAINING

DAY TWO (continued)

2:45 Entrepreneurial Strategies
  ▪ Setting Up a Nonprofit Entity
  ▪ Mixed Income Housing and Mixed Use Development
  ▪ Leveraging the Capital Fund (CFFP)
  ▪ Mixed-Finance Development
    • HOME
    • CDBG Funds
    • Choice Neighborhoods Program
    • Bond Financing
    • Low Income Housing Tax Credit (LIHTC)
  ▪ Regionalization

5:00 End of Day Two
DAY THREE

8:00  Entrepreneurial Strategies (continued)
  ▪ Overview of the Real Estate Development Process
  ▪ Starting a New Business Venture

Rental Assistance Demonstration Program (RAD)
  ▪ Overview
  ▪ PBV vs. PBRA and Required Policies and Forms
  ▪ The RAD Process
  ▪ Programs Commonly in RAD Developments
  ▪ Special Provisions for PHA-Owned Properties

Asset Repositioning and Portfolio Planning
  ▪ Short-Term and Long-Term Assessment of Each Project
  ▪ Physical Needs Assessment (PNA) and Market Data
  ▪ Funding Sources
  ▪ Portfolio Planning and Asset Repositioning Strategies

10:15  Break

10:30  Managing Nondiscrimination
  ▪ The PHA’s Fair Housing Requirements
    • The Laws, Executive Orders, HUD Rules, and Supreme Court Decisions
    • Discriminatory Effects and Disparate Treatment

12:00  Lunch (on your own)
DAY THREE (continued)

1:00 Managing Nondiscrimination (continued)
  • Reasonable Accommodation
    • Definition of “Disabled”
    • The Reasonable Accommodation Process
    • Verification – What the PHA Can and Cannot Ask
    • Reasonableness of Request
    • Reasonable Accommodation Functions
      o Service Animals and Assistance Animals
  • Overview of Physical Accessibility

2:30 Break

2:45 Managing Nondiscrimination (continued)
  • Limited English Proficient (LEP) Persons
  • Violence Against Women Act (VAWA)
  • The 504 Coordinator – Monitoring
  • Sample Forms

PROCUREMENT
  • Regulations and Guidance
  • Basics of Procurement – Small Purchases, Sealed Bidding, Competitive Proposals, Noncompetitive Proposals
  • Types of Contracts and Contract Monitoring
  • Section 3 of the HUD Act of 1968

PHAS
  • 3-2-1 Schedule under the Interim Rule
  • PHAS Indicators, Subindicators, and Scoring
    • Physical Condition
    • Financial Condition
    • Management Operations
    • Capital Fund

5:00 End of Day Three
DAY FOUR

8:00  Managing the Program Elements
   ▪ Directing the Management and Supervision of Staff
   ▪ Overseeing the Management of Key Program Elements
     • Smoke-Free Public Housing
     • Mandatory vs. Discretionary Terminations
     • Hearings
     • Property Management
     • EIV
     • Records and Confidentiality
   ▪ Management Controls
   ▪ Tracking Performance (Quality Control)
     • Addressing Staff Capacity and Poor Performance
     • Sample Reports

10:15  Break

10:30  Program Integrity and Ethics
   ▪ Internal Controls
     • Risk Assessment, Control Activities, Monitoring, Communication
     • Behavior and Conduct of PHA Personnel, Preventing Unintentional Errors
     • Investigation of Possible Violations
   ▪ Ethics
     • Strong Ethics Policies and Practices
     • Principles of Personal Ethics
     • The Ethical Challenges
     • Sample Employee Standards of Conduct

12:00  Lunch (on your own)
AGENDA
PUBLIC HOUSING EXECUTIVE MANAGEMENT
WEB TRAINING

DAY FOUR (continued)

1:00 Strategic Planning
   - Planning the Process
   - Steps in the Strategic Planning Process
   - SWOT Analysis How-To
   - The Action Plan
   - Implementation, Dissemination, and Training
   - Emerging Strategic Issues
     - Succession Planning
     - The Multigenerational Workplace

2:30 Review

3:00 End of Seminar

Certification Exam Available Online