AGENDA
PUBLIC HOUSING EXECUTIVE MANAGEMENT

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)
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

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

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
AGENDA
PUBLIC HOUSING EXECUTIVE MANAGEMENT

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)

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)
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

2:15    Break

2:30    Review and Study
        Certificates of Participation Awarded

3:00    Public Housing Executive Management Certification Exam

5:00    End of Exam and Seminar