

AGENDA
BLENDED OCCUPANCY MANAGEMENT
LIHTC/PBV/HOME
WEB TRAINING

DAY ONE

- 8:00** **Registration**
- 8:30** **Welcome and Introductions**
- Course Introduction
 - Learning Outcomes
- Overview of Housing Programs**
- What is Blended Occupancy?
- Low-Income Housing Tax Credit Program Basics**
- Credits versus Deductions
 - Regulatory Agencies
 - LIHTC Basics
 - Rent limits
 - Income Limits
 - Minimum Set-Aside (MSA)
 - Definition of a Project
- 10:15** **Break**
- 10:30** **Important Compliance Time Periods**
- Credit Period
 - Federal Compliance Period
 - Extended Use Period
 - Placed-in-Service Date
- Regulatory Documents**
- 12:00** **Lunch (on your own)**

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DAY ONE (continued)

- 1:00 Section 8 Project-Based Vouchers (PBV)**
- Overview
 - The HAP Contract
 - Rent and Income Limits
 - Important Documents
 - Inspection Protocol
- HOME**
- Overview
 - Participating Jurisdictions (PJs)
 - Rent and Income Limits
 - Fixed vs. Floating Units
 - Important Documents
 - Inspection Protocol
- 2:30 Break**
- 2:45 Waiting List, Tenant Selection, and Occupancy**
- Waiting List Management
 - Preferences
 - Occupancy Requirements and Standards
- Managing Eligibility**
- Income Limits
- 5:00 End of Day One**

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DAY TWO

- 8:00** **Managing Eligibility (continued)**
- Student Status
 - Citizenship Status
 - Social Security Numbers
 - Equal Access Rule
 - Screening
- 10:15** **Break**
- 10:30** **Calculating Gross Annual Income**
- Annualizing Income
 - Income Inclusions and Exclusions
 - Income from Assets
 - Verification
- 12:00** **Lunch (on your own)**
- 1:00** **Preparing to Rent the Unit**
- Security Deposit Requirements
 - Accessible Units
 - Leases
- Rents**
- Unit Rents and Determining Household Rents
 - Utility Allowances
- 2:30** **Break**

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DAY TWO (continued)

- 2:45** **Recertifications**
- Annual Recertifications
 - Interim Recertifications
- Managing the Unit Mix**
- Next Available Unit Rule in LIHTC
 - Zero HAP in PBV
- 5:00** **End of Day Two**

DAY THREE

- 8:00** **Managing the Unit Mix (continued)**
- Managing the Unit Mix with Fixed HOME Units
 - Managing the Unit Mix with Floating HOME Unit
- Moves, Transfers, and Terminations**
- Moves and Transfers
 - Terminations
- Certificates of Participation**
- 10:15** **Break**
- 10:30** **Review**
- 12:00** **End of Seminar**

Certification Exam Available Online