

**AGENDA**  
*BLENDED OCCUPANCY MANAGEMENT*  
*LIHTC/PBV/HOME*

**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 Exam**
- 12:00**      **Lunch (on your own)**
- 1:00**      **Certification Exam**
- 3:00**      **End of Seminar**