

**AGENDA**  
*BLENDED OCCUPANCY MANAGEMENT*  
*LIHTC AND RAD PBV*

**DAY ONE**

- 8:00**      **Registration**
- 8:30**      **Welcome and Introductions**
- Course Introduction
  - Learning Outcomes
- Introduction to Blended Occupancy Projects**
- Low-Income Housing Tax Credit (LIHTC) Overview**
- Overview
  - Housing Finance Agencies
  - Important Time Periods
  - Minimum Set Aside
    - Income Averaging
    - Additional Set Asides
  - Building vs Project
  - Applicable Fraction
- 10:15**      **Break**
- 10:30**      **Low-Income Housing Tax Credit (LIHTC) Overview (continued)**
- Placed-in-Service Date
  - Rent Limits
  - Important Documents
  - Program Assessment
  - Property Inspections
- Post Test**
- 12:00**      **Lunch (on your own)**

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**DAY ONE (continued)**

- 1:00 RAD PBV Overview**
- Overview
    - Standard PBV
    - RAD PBV
  - Role of HUD, PHA, Owner, Families
  - Important Documents
  - PHA-Owned Units
  - Rent and Income Limits
- 2:30 Break**
- 2:45 RAD PBV Overview (continued)**
- The HAP Contract
  - Program Assessment
  - Inspections
- Post Test**
- Waiting List, Tenant Selection, and Occupancy**
- General Use Rule
  - Preferences
- 5:00 End of Day One**

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**DAY TWO**

- 8:00**      **Waiting List, Tenant Selection, and Occupancy (continued)**
- Occupancy Requirements and Standards
  - Tenant Selection
- Post Test**
- Managing Eligibility**
- Income Limits
  - Student Status
  - Citizenship Status
- Learning Activities**
- Post Test**
- 10:15**      **Break**
- 10:30**      **Managing Eligibility (continued)**
- Social Security Numbers
  - Equal Access Rule
  - Screening and Denials
- Learning Activities**
- Post Test**
- Calculating Gross Annual Income**
- Annualizing Income
- Learning Activity**
- 12:00**      **Lunch (on your own)**

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**DAY TWO (continued)**

- 1:00**      **Calculating Gross Annual Income (continued)**
- Income Inclusions and Exclusions
  - Income from Assets
  - Verification
- Post Test**
- 2:30**      **Break**
- 2:45**      **Preparing to Rent the Unit**
- Security Deposit Requirements
  - Accessible Units
  - Pets
  - Leases
  - Vacancy Payments in PBV
- Post Test**
- Rents**
- Unit Rents and Determining Household Rents
  - Utility Allowances
- Post Test**
- 5:00**      **End of Day Two**

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**DAY THREE**

- 8:00**      **Recertifications**
- Annual Recertifications
  - Interim Recertifications in PBV
- Post Test**
- Managing the Unit Mix**
- Next Available Unit Rule in LIHTC
  - Zero HAP in PBV
- 10:15**      **Break**
- 10:30**      **Moves, Transfers, and Terminations**
- Moves and Transfers
  - Terminations
- Post Test**
- Review**
- Certificates of Participation Awarded**
- Seminar Evaluations**
- 12:00**      **Lunch (on your own)**
- 1:00**      **Blended Occupancy Management (LIHTC and RAD PBV)**  
**Certification Examination**
- 3:00**      **End of Examination and Seminar**