

AGENDA
BLENDED OCCUPANCY MANAGEMENT
LIHTC AND RAD PBRA

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)**

AGENDA
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LIHTC AND RAD PBRA

DAY ONE (continued)

- 1:00 RAD PBRA Overview**
- Overview
 - Standard PBRA
 - RAD PBRA
 - CAs/PBCAs
 - Important Documents
 - Rent and Income Limits
- 2:30 Break**
- 2:45 RAD PBRA Overview (continued)**
- The HPA Contract
 - Program Assessment
 - Inspections
- Post Test**
- Waiting List, Tenant Selection, and Occupancy**
- General Use Rule
 - Preferences
- 5:00 End of Day One**

AGENDA
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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)**

AGENDA
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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
- 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 PBRA
- Post Test**
- Managing the Unit Mix**
- Next Available Unit Rule in LIHTC
 - Increases in Income in RAD PBRA
- 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 PBRA)**
Certification Examination
- 3:00** **End of Examination and Seminar**