

**AGENDA**  
*PROPERTY MANAGER ESSENTIALS*

**DAY ONE**

- 8:00 Registration**
- 8:30 Welcome and Introductions**
- 8:45 Introduction to the Role of the Property Manager**
- The new HUD model for public housing
  - Compliance with asset management – seven criteria
  - Organizational policies
- 10:15 Break**
- 10:30 PHA Case Study – Hilldale Housing Authority**
- Learning activities throughout
- Property Management**
- Marketing – filling your units
  - Attracting and selling
  - Site-based waiting lists
  - Maintenance supervision - keeping your project physically sound
  - Property control
  - Capital improvements
  - Security, risk management, and insurance
  - Self-graded quiz
- 12:00 Lunch (on your own)**
- 1:00 Nondiscrimination Compliance Pre-Test**
- PHAS and Project-Based Management**
- PHAS interim rule
  - Physical condition indicator
  - Financial condition indicator
  - Management indicator
- 2:30 Break**
- 2:45 PHAS and Project-Based Management (con't)**
- Capital Fund indicator
  - Self-graded quiz
- Nondiscrimination Compliance**
- Reasonable accommodation
- Review and Questions**
- 5:00 End of Day One**

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**DAY TWO**

- 8:00**      **Nondiscrimination Compliance (con't)**
- Limited English proficiency
  - Violence Against Women Act (VAWA)
- Understanding and Managing to the Budget**
- Learning activities throughout
    - Project-based budgets
    - Understanding budget terms – PUM
- 10:15**      **Break**
- 10:30**      **Understanding and Managing to the Budget (con't)**
- The budget process
    - Responsibilities of the property manager
  - The budget
    - Hilldale Housing Authority case study learning activities
  - Steps in budget preparation
- 12:00**      **Lunch (on your own)**
- 1:00**      **Understanding and Managing to the Budget (con't)**
- Budget monitoring
  - Paying for services
    - Delivery of services in best interest of property
    - Shared services
    - Frontline allocated costs
- 2:30**      **Break**
- 2:45**      **Understanding and Managing to the Budget (con't)**
- Fee-for-service
  - Fees paid by the project to the COCC
  - Budget monitoring and budget-to-actual
  - The balance sheet
  - Self-graded quiz
- Enforcing the Lease**
- Progressive steps in lease enforcement
  - Problematic lease provisions
  - Eviction
  - Self-graded quiz
- 5:00**      **End of Day Two**  
**Optional Study Group**

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**DAY THREE**

- 8:00 Procurement and Contract Management at the Project**
- Procuring goods and services for the project
  - Small purchases
    - Micro-purchases
    - Petty cash and purchase orders
    - Approving payments
  - Sealed bidding
  - Contract management and monitoring
- Project Reporting**
- Reporting responsibilities
  - Examples of reports to monitor project performance
- 10:15 Break**
- 10:30 Day-to-day Supervision at the Project**
- Role of the supervisor
  - Communication
  - Meeting management
  - Correcting problems
- 12:00 Lunch (on your own)**
- 1:00 Day-to-day Supervision at the Project (con't)**
- Managing conflict
  - Delegation
  - Quality control
  - Staff productivity
- 1:30 Review and Break**
- 1:45 Certificates of Participation Awarded**
- 2:00 Certification Examination (Online Exam at option of PHA)**
- 4:00 End of Seminar**