



Nan McKay & Associates

Seminar Catalog



*Providing training and certification for the
Housing Choice Voucher and Public Housing Programs*

Seminar Catalog

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Housing Choice Voucher (HCV) and Public Housing Seminars



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Advanced Inspection

PURPOSE: If you are going to be responsible for the bricks and mortar, this seminar will give you the basic understanding of how it all fits together. You will begin by learning the fundamentals of buildings from single family homes to multifamily buildings, in addition to green building technology and energy conservation. With these under your belt, you will then learn the building systems of a housing unit and problem signs that can help you detect possible failures early. The seminar ends with an exploration of how you and your department can increase agency performance through an understanding how inspections affect residents, staff, the community, and overall PHA success. Ensure the sustainability of your key asset; join us for our Advanced Inspection Seminar.

LEARNING OUTCOMES: Upon completion of the **Advanced Inspection Seminar**, using current building sciences best practices and HUD guidance, you should understand:

- How building construction affects the long-term viability of your portfolio, including:
 - Maintenance delivery
 - Modernization priorities
 - Inspection standards
- An overview of building systems, which covers:
 - Site
 - Foundations: type, materials, and failures
 - Building envelope (roof, siding, windows): materials and failures
 - Electrical systems: materials and equipment
 - Plumbing systems: materials; equipment (municipal and private) supply; and drain, waste, vent (DWV)
 - Heating and ventilation: equipment and safety
- How green building design relates to your choices in building systems

SEMINAR NO: 101-039

PRICE: \$675 per person

MATERIALS: *Advanced Inspector Training Course Book*, NMA pen, pencil, and bag

METHOD: A group-live seminar featuring PowerPoint, case studies, videos, group discussion, seminar materials (course book), and Q & A

LENGTH: Two days

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AUDIENCE: Housing choice voucher and public housing program administrators, asset and site managers, inspectors, inspection supervisors, modernization and rehabilitation managers, and maintenance staff

EXAM: A certification exam is available for \$150

CREDITS: **CPE** units w/ exam = 15 **CEU** units w/ exam = 1.2. No prerequisites or advanced preparation required for this seminar.

Effective Interviewing & Fraud Prevention

PURPOSE: Successful fraud prevention and error reduction strategies begin with interviewing. This seminar provides the know-how to produce skilled, well-trained interviewing staff, utilize effective tools for communication and data collection, and bring into being a standardized staff interviewing methodology. Throughout the seminar, you will examine hands-on case studies that will better bring to light topics such as conducting eligibility interviews, resolving discrepancies, questions to prevent fraud, and ideas for data collection and verification forms.

LEARNING OUTCOMES: Upon completion of the **Effective Interviewing & Fraud Prevention Seminar**, using HUD regulations and guidance, you should be able to:

- Identify the skills needed for interviewing effectively
- Learn a planned approach to interviewing
- Improve your questioning techniques:
 - What makes one question better than another?
 - What questions should you avoid?
 - How do you bridge questions to gather maximum information?
- Utilize interview tools and forms for program integrity
- Improve your listening skills
- Deal more effectively with “zero income” families
- Recognize deception indicators
 - Identify when someone might be withholding information
- Identify policy issues to improve program integrity

SEMINAR NO: 101-058

PRICE: \$675 per person

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- MATERIALS:** *Effective Interviewing* workbook, handouts including a laminated “Income” sign, “Assets” sign and “My Job/Your Job” sign, NMA pen, pencil, and bag
- METHOD:** A group-live seminar featuring PowerPoint, case studies, group discussion, seminar materials (workbook, course book or master book), brainstorming, and Q & A
- LENGTH:** Two days
- AUDIENCE:** Occupancy staff and anyone conducting tenant interviews
- EXAM:** No exam available for this seminar
- CREDITS:** **CPE** units w/ exam = 16 **CEU** units w/ exam = 1.4
No prerequisites or advanced preparation required for this seminar

Essentials for Commissioners

PURPOSE: If a board is clear about its role and responsibilities, the housing authority is on the track to success. Essential for new and veteran board members, and for executive directors, this seminar offers a solid overview of commissioner legal responsibilities. This is your opportunity to come together and think strategically. Included are topics such as understanding and approving all PHA policies, what those policies are and how to monitor them, and the relationships between the board members, executive director, staff, HUD, and the community. What does the board need to know about asset management? What are the fundamentals of performance measures, finances, and management controls all commissioners should understand? The answers to these questions and other concerns such as avoiding lawsuits, principles of effective meetings, and strategic planning will be covered in this seminar.

LEARNING OUTCOMES: Upon completion of the **Essentials for Commissioners Seminar**, using HUD regulations and guidance, you should understand:

- The day-to-day operations of a PHA
- The relationships between the key players and the PHA
- The roles of the board, the executive director, and the PHA staff
- The basics of the housing choice voucher program
- The basics of the public housing program
- Budgeting and controls
- How to avoid lawsuits
- What constitutes good public policy
- The fundamentals of managing the board
- Strategic planning for the PHA

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- SEMINAR NO:** 101-040
- PRICE:** \$675 per person
- MATERIALS:** *Essentials for Commissioners Workbook, Essentials for Commissioners Handbook, Strength Deployment Inventory, NMA pen, pencil, and bag*
- METHOD:** A group-live seminar featuring PowerPoint, case studies, group discussion, seminar materials (workbook, course book or master book), brainstorming, and Q & A
- LENGTH:** Two days
- AUDIENCE:** Commissioners and executive directors
- EXAM:** No exam available for this seminar
- CREDITS:** **CPE** units w/ exam = 15 **CEU** units w/ exam = 1.2
No prerequisites or advanced preparation required for this seminar

Fair Housing & Reasonable Accommodation

PURPOSE: This seminar is a comprehensive overview of all essential federal fair housing laws relevant to public housing and HCV program operations. Upon completion, participants will leave with not only a better understanding of federal fair housing laws, HUD regulations, and fair housing resources, but also the ability to apply the laws and regulations to PHA work, which assures your best efforts with compliance.

Topics addressed will include:

- How are reasonable accommodation requests handled at your PHA?
- Is your PHA prepared for upcoming HUD and FHEO civil rights monitoring fair housing reviews?
- Has your agency thought through possible VAWA situations and best practices?

This seminar was developed to educate and support PHA staff members and administrators on fair housing issues that every PHA should be aware of and have a plan to address. Case study activities are developed from current, real life fair housing legal actions against PHAs and through review of recent HUD VCA agreements and PHA fair housing audits.

LEARNING OUTCOMES: Upon completion of the **Fair Housing & Reasonable Accommodation Seminar**, using HUD regulations and guidance, you should be able to:

- Understand how fair housing laws apply to public housing authority (PHA) admission, occupancy, and termination policies, procedures, and decision-making processes

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- This includes discussion of what discrimination means in application and the role of the PHA in the community to affirmatively further fair housing.
 - This also includes a brief discussion of customer service, language use, and disability related communication etiquette.
- From practice through case study examples, apply the reasonable accommodation process at all program levels including application, occupancy, and termination
- Recognize the difference between HUD's definition of *disability* as it relates to PHA eligibility, rent calculation, PIC reporting, and the Fair Housing Act's broader definition of *disability* as it relates to reasonable accommodation by reviewing the HUD regulations and HUD/DOJ joint statements
- Understand PHA legal mandates under the Violence against Women Reauthorization Act (VAWA) by reading parts of VAWA legislation and participating in group discussions of VAWA scenarios
- Demonstrate a working knowledge through discussion and assessment of HUD's factors for compliance assessment under HUD's limited English proficiency (LEP) guidance, including examination of the four factor analysis as well as development and implementation options for language assistance plans
- Exhibit awareness of PHA issues regarding hate crimes (using DOJ resources), race, sexual harassment (using HUD's recent guidance), disability, and familial status discrimination (using recent news reports and HUD charges)
- Be aware of fair housing PHA best practice models and common PHA errors that have resulted in lawsuits, voluntary compliance agreements, and PHA monetary loss by discussing and reading real life legal actions brought by HUD, DOJ, and legal aid groups
- Be able to locate and use critical fair housing resources, including:
 - HUD/DOJ joint statements on reasonable accommodations and modifications
 - HUD PIH notices on reasonable accommodation including Notice PIH 2006-13 (extended by Letter 2007-05)
 - HUD guidance on sexual harassment and housing
 - DOJ resources for LEP and disability rights information
 - HUD regulations including Part 8 and Part 100
- Discuss and identify issues specific to the HCV and public housing programs including renting from relatives, exception payment standards, UFAS, and transfer of accessible units

SEMINAR NO: 101-018

PRICE: \$675 per person

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MATERIALS: *Fair Housing and Reasonable Accommodation Workbook*, NMA pen, pencil, and bag

METHOD: A group-live seminar featuring PowerPoint, case studies, group discussion, seminar materials (workbook, course book or master book), brainstorming, and Q & A

LENGTH: Two days

AUDIENCE: All PHA staff

EXAM: A certification exam is available for \$150

CREDITS: **CPE** units w/ exam = 14 **CEU** units w/ exam = 1.2

Prerequisites: Basic knowledge of housing programs and issues

HCV & Public Housing Rent Calculation

PURPOSE: The purpose of this seminar is to teach rent calculation for both the public housing and housing choice voucher programs. The seminar has been carefully structured for combination areas to be trained together.

LEARNING OUTCOMES: Upon completion of the **Housing Choice Voucher (HCV) & Public Housing Rent Calculation Seminar**, using HUD regulations and guidance, you should be able to:

Annual Income

- Identify the types of income that must be included in or excluded from annual income using 24 CFR 5.609, Section 7 of the 50058, learning activities, and narrative instruction
 - Identify types of income that are included and types that are excluded from annual income, including federally mandated exclusions
 - Determine when to impute sanctioned welfare, calculate the amount, and how to offset imputed welfare with new income
 - Determine how to treat different types of income including self employment, seasonal, sporadic, periodic payments, and lump sums
 - Calculate the incremental increase for training program income and understand when to exclude that incremental increase
 - Calculate annual income including annualizing income figures, rounding, and net vs. gross income

EID

- Calculate and track the earned income disallowance (EID) using 24 CFR, NMA's EID worksheet, learning activities, discussion, and narrative instruction

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- Identify the three qualifying criteria to receive the EID as well as the differences in initial qualification for persons in the HCV and public housing programs
- Calculate the incremental increase
- Identify challenges and strategies for tracking EID in both the initial exclusion period and the phase-in

Assets

- Identify assets and calculate income from assets using 24 CFR, Section 6 of the 50058, learning activities, and narrative instruction
 - Calculate the cash value, market value, and anticipated income of assets
 - Calculate imputed asset income when the total cash value of assets exceeds \$5000
 - Identify which assets are included and which are not
 - Calculate the market and cash values and the net rental income for rental property
 - Identify assets disposed of for less than fair market value and calculate the amount to be imputed for two years from the date of sale

Adjusted Income

- Calculate adjusted income by correctly deducting HUD-defined allowances and expenses from annual income using 24 CFR, Section 8 of the 50058, learning activities and narrative instruction
 - Identify who qualifies for the dependent and elderly/disabled allowances
 - Calculate the childcare allowance, the income cap (when it applies), and identify who qualifies and what expenses qualify for the deduction
 - Calculate the disability assistance expense, income cap, 3% threshold, and identify who qualifies and what expenses qualify for the deduction
 - Calculate the medical expense deduction, 3% threshold, and identify who qualifies and how to set policies for what expenses qualify
 - Determine how family composition effects qualifications for a deduction and calculate adjusted income using the 5 major HUD deductions

Verification

- Recognize the requirements for verification of income, allowances, and expenses using the HUD verification guidebook and narrative instruction
 - Discuss HUD's verification hierarchy and how it relates to PHA practice
 - Understand the importance of documentation in the verification process
 - Identify the role of HUD's EIV system and when to use it in the verification process

Rent Calculation

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- Calculate rent using annual and adjusted income in learning activities using Sections 9, 10, and 12 of the 50058 as well as narrative instruction
 - Calculate TTP using total monthly income, minimum rent, welfare rent, and adjusted monthly income
 - Determine the role of the utility allowance and when a family would receive a utility reimbursement payment
 - Demonstrate an awareness of the minimum rent range and the process for minimum rent hardship exemptions
 - Calculate and identify the components of rent for the public housing program including tenant rent, flat rent, and ceiling rents
 - Calculate the components of rent for the HCV program including payment standards, HAP, affordability, and family share
 - Calculate prorated rent for mixed families

SEMINAR NO: 101-104

PRICE: \$800 per person

MATERIALS: *Rent Calculation for HCV and Public Housing Workbook, Rent Calculation References Course Book*, and NMA pen, pencil, calculator, and bag

METHOD: A group-live seminar featuring PowerPoint, case studies, group discussion, seminar materials (workbook, course book or master book), brainstorming, and Q & A

LENGTH: Three days

AUDIENCE: Occupancy and reexam staff and supervisors

EXAM: Certification exams available for HCV, public housing, or combined for \$150

CREDITS: **CPE** units w/ exam = 21 **CEU** units w/ exam = 1.75

No prerequisites or advanced preparation required for this seminar

Indoor Air Quality

PURPOSE: There are over 10,000 mold and asbestos related cases currently pending in the judicial system. The number of such suits, from property owners, the private sector, voucher programs, and public housing authorities in general, is growing. This seminar provides detailed instruction on how to identify, prevent, and remediate these indoor air quality hazards like mold, asbestos, lead-based paint, and radon. Learn to develop a proactive approach that will help reduce your liability exposure.

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LEARNING OUTCOMES: Upon completion of the **Indoor Air Quality Seminar**, using HUD regulations and guidance, you should be able to:

- Recognize the risks of inaction
- Identify how the hazards are created, and the core reasons for the problems
- Implement preventative measures to put an end to recurring problems and hazard exposure
- Apply best practice solutions to the problems, including execution and follow-up.

SEMINAR NO: 101-043

PRICE: Onsite only – call for pricing

MATERIALS: *Indoor Air Quality Workbook*, “The Facts about Mold” pamphlet, mold poster, NMA pen, pencil, and bag

METHOD: A group-live seminar featuring PowerPoint, case studies, videos, group discussion, seminar materials (workbook), and Q & A

LENGTH: One day

AUDIENCE: Housing choice voucher and public housing program administrators, maintenance staff, asset and site managers, inspectors, inspection supervisors, and modernization and rehabilitation managers

EXAM: No exam available for this seminar

CREDITS: **CPE** units w/ exam = 7 **CEU** units w/ exam = 1.3

No prerequisites or advanced preparation required for this seminar

Procurement & Contract Management

PURPOSE: NMA’s **Procurement & Contract Management Seminar** focuses on HUD’s handbook 7460.8 REV 2, which includes essential information for PHAs to comply with HUD regulations. This seminar will help your PHA establish an up-to-date and comprehensive procurement policy. Understanding the handbook and how it relates to project-based accounting, budgeting, and management will help you delegate more procurement and contract management responsibilities and accountability to your sites. By the end of this seminar, you should understand how to obtain the highest quality goods and services for the right cost, delivered on time, and in compliance with applicable laws and policies. In addition, you can learn to estimate costs of goods and services, develop criteria for the analysis of proposals, and realize cost savings in your procurement operation. The seminar will also cover temporary regulatory changes resulting from ARRA, stimulus dollars, and the “Buy American” provision.

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Understanding the handbook and implementing changes in PHA procurement policy is essential because the handbook:

- Provides very clear direction on what is mandatory and what is not
- Provides important definitions, including *micro purchase*, intended to “drill down” procurement to the site
- Simplifies and streamlines requirements to encourage more decentralization of procurement
- Contains strong guidance on ethics in procurement and contract management

LEARNING OUTCOMES: Upon completion of the **Procurement and Contract Management Seminar**, using HUD regulations and guidance, you should be able to:

- Identify the procurement requirements the PHA must follow
- Recognize the various methods of procurement and contracting available to the PHA
- Understand how procurement can become more decentralized
- Apply good contract management principles

SEMINAR NO: 101-048

PRICE: \$675 per person

MATERIALS: *Procurement and Contract Management Course Book*, NMA pen, pencil, and bag

METHOD: A group-live seminar featuring PowerPoint, case studies, group discussion, seminar materials (course book), and Q & A

LENGTH: Two days

AUDIENCE: Procurement and contract management staff

EXAM: A certification exam is available for \$150

CREDITS: **CPE** units w/ exam = 14 **CEU** units w/ exam = 1.2

No prerequisites or advanced preparation required for this seminar

Supervisory Management

PURPOSE: This three-day highly interactive workshop gives learners a broad understanding of the role of the supervisor, the skills necessary to succeed, and the ability to recognize an effective supervisory management system at the PHA. Highlights include managing to the HCV and public housing budgets, identifying and addressing performance problems, hiring, training and evaluating staff, monitoring and tracking work to key performance standards, and managing for productivity. Each learner will design a

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personal supervisory career plan to ensure continued success. The seminar also offers a certification examination.

LEARNING OBJECTIVES: Upon completion of the **Supervisory Management Seminar**, using HUD regulations and guidance, you will know the:

- Role of the supervisor in a PHA
- Knowledge, skills, and abilities needed for successful supervision
- Role of a PHAs vision, mission, and goals in effective supervision
- Steps in effective time management, motivation, delegation, decision-making (including the progressive corrective process), and conflict management
- Criteria for effective job descriptions, performance standards, and training
- Criteria for developing, monitoring, and managing to the HCV budget and public housing budget
- Concepts necessary to make ethical decisions and avoid discriminatory actions
- Role of quality control in supervision

You will be able to recognize effective techniques to:

- Communicate to both the team and individuals verbally, in writing, and in meetings
- Manage diversity and avoid discrimination
- Coach employees
- Assess performance problems to identify appropriate action
- Conduct performance evaluations

SEMINAR NO: 101-060

PRICE: \$800 per person

MATERIALS: *Supervisory Management Workbook*, NMA pen, pencil, and bag

METHOD: A group-live seminar featuring PowerPoint, case studies, group discussion, seminar materials (workbook, course book or master book), brainstorming, and Q & A

LENGTH: Three days

AUDIENCE: Frontline supervisors, middle managers, and executive managers; learners new to supervising staff and seasoned managers seeking to improve target skills; managers seeking to establish a quality supervisory management environment at the PHA to achieve business objectives

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EXAM: A certification exam is available for \$150

CREDITS: **CPE** units w/ exam = 14 **CEU** units w/ exam = 1.2

No prerequisites or advanced preparation required for this seminar. Prerequisites: Basic knowledge of housing programs and issues.

RELATED COURSES: HCV Executive Management, Asset Management for Public Housing Executives, Public Housing Management, Project-Based Essentials for Property Managers, Project-Based Maintenance Management, Family Self-Sufficiency, and Self-Sufficiency Case Management

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Housing Choice Voucher (HCV) Seminars



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HCV Eligibility

PURPOSE: Maximize SEMAP points for selection from the waiting list and ensure you and your staff understand the critical basics of housing choice voucher eligibility by enrolling in this 2-day seminar.

LEARNING OUTCOMES: Upon completion of the **HCV Eligibility Seminar**, using HUD regulations and guidance, you should be able to:

- Demonstrate knowledge of basic HCV program information through discussion and directed instruction
 - Identify the key roles and relationships in the HCV program
 - Read HUD notices, regulations, and other resources with a focus on critical information
 - Be aware of PHA responsibilities and owner responsibilities throughout the program
- Apply HUD requirements regarding fair housing to the HCV program operations using case studies, discussion, and narrative instruction
- Recognize all of the factors of eligibility and how they affect families as they apply to the PHA by narrative instruction, case study, and discussion
 - Identify the different family types that HUD defines
 - Understand and utilize required HUD forms
 - Discuss and demonstrate understanding of the process to verify social security numbers or the absence of those numbers
 - Categorize the different types of citizenship status of applicants as well as the resulting types of families
 - Discuss income limits and how they play a role in the eligibility process
 - Review the student rule and discuss how it applies to eligibility in the HCV program
- Discuss wait list management as it applies to application, preferences, and removal through discussion, narrative instruction, and case studies
 - Discuss the initial application process and how it functions in the housing authority
 - Understand how to organize wait lists including special admissions and targeted funding
 - Follow the process for removal from the wait list
 - Examine the different preferences that the PHA can have for placement on the waiting list
- Examine the final eligibility determination stage through discussion, narrative instruction, case studies, and examination of the Screening and Eviction Rule
 - Examine the full application stage of final eligibility determination including the interview and timelines

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- Identify reasons to deny admission both mandatory and discretionary, including a discussion of the Screening and Eviction Rule
- Discuss the process leading up to conducting informal reviews

SEMINAR NO: 101-020

PRICE: \$675 per person

MATERIALS: *HCV Eligibility Workbook, HCV HUD References Course Book*, NMA pen, pencil, and bag

METHOD: A group-live seminar featuring PowerPoint, case studies, group discussion, seminar materials (workbook, course book or master book), brainstorming, and Q & A

LENGTH: Two days

AUDIENCE: Eligibility specialists, waiting list supervisors and HCV staff

EXAM: A certification exam is available for \$150

CREDITS: **CPE** units w/ exam = 12 **CEU** units w/ exam = 1.0
No prerequisites or advanced preparation required for this seminar

HCV Executive Management

PURPOSE: Succeed in today's environment of reform and innovation with the help of this in-depth 5-day training seminar. Gain critical insight into developing policies and procedures that work well for your agency. You can learn to develop program integrity policies that will prevent and detect fraud effectively. You can also gain valuable ideas and tools to develop quality control systems that measure key areas of program performance for improved SEMAP performance and RIM reviews. This seminar provides material to manage staff performance and tools to meet staff development needs. Managers can come away with a basic understanding of program financing, budgets, fees, forecasting, and monitoring tools.

LEARNING OUTCOMES: Upon completion of the **HCV Executive Management Seminar**, using HUD regulations and guidance, you should understand:

- An HCV organizational overview, including an overview of subsidized housing programs, the functions of HUD, congress, and the PHA, the general structure of a PHA, and HCV director job descriptions
- Policy and policy development, including required agency plans, and policy and procedure development

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- Managing nondiscrimination, including reasonable accommodation, limited English proficiency (LEP) persons, and the Violence against Women Act (VAWA)
- Financial management and program utilization, including the key points of HAP funding, the key points of fees funding, reporting requirements, financial audit requirements, monitoring your funding, managing your funding, the voucher issuance program (VIP), maximizing administrating resources, and HCV fee for service
- Managing the program elements, including leasing, annual and interim activities, moves, unit inspections, portability, terminations, informal reviews, and hearings
- Quality control and planning including making success measurable through quality control, types of quality control, designing a quality control program, and quality control strategy
- Program integrity, including internal controls, preventing unintentional errors, and managing income integrity improvement
- Managing SEMAP, including the SEMAP process, PHA supervisory audits, and HUD indicators verified by PIC
- Managing the family self-sufficiency program
- Project-based vouchers, including general requirements, owner proposals, inspections under PBV, housing assistance payments, selection of PBV program participants, determining rent to owner, and payments to owner
- Organizational development, including mission and vision statements, organization culture, organizational structure, and staffing
- Ethics, leadership, and managing staff, including transition to manager, communication skills, motivating staff, delegation, discipline, meeting management, selecting and training personnel, and performance evaluations
- Strategic thinking and planning

SEMINAR NO: 101-025

PRICE: \$1300 per person

MATERIALS: *HCV Executive Management Master Book, HCV Executive Manager Workbook, HCV HUD References Course Book, HCV management independent project, "Improving Test Taking Skills," NMA pen, pencil, calculator, and bag*

METHOD: A group-live seminar featuring PowerPoint, case studies, group discussion, seminar materials (workbook, course book or master book), brainstorming, and Q & A

LENGTH: Five days

AUDIENCE: Executive directors, HCV directors, HCV supervisors, and analysts

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EXAM: Registration includes certification exam

CREDITS: **CPE** units w/ exam = 35 **CEU** units w/ exam = 2.9

Prerequisites: Knowledge of housing programs and of basic management principles.

HCV Financial Management & Reporting

PURPOSE: This three-day seminar is the most comprehensive seminar on HCV financial management available. With funding tight as ever, it has never been more important to understand how the program is funded and how to monitor financial performance. This seminar will provide you with the knowledge and tools needed to understand how to determine funding, monitor financial performance, and report financial results to HUD. In this seminar, you can learn not only about GAAP accounting requirements, but about the regulations affecting financial management and reporting as well. Additionally, you can learn HUD's requirements for VMS and REAC reporting. This session will be most beneficial to accounting and finance staff charged with the day-to-day financial management of the HCV program, executive directors, and other nonfinancial staff who are interested in understanding the big picture of HCV financial management.

LEARNING OUTCOMES: Upon completion of the **HCV Financial Management & Reporting Seminar**, using HUD regulations and guidance, you should understand:

- Annual contributions contract documents
- Program funding for calendar year (CY) 2009
- HCV regulatory accounting requirements
- Specific GAAP issues in the HCV program
- Allocation of indirect costs in the HCV program
- HUD HCV program chart of accounts
- Special accounting issues in the HCV program such as fraud recovery, accounting for portability, and accounting for FSS activity
- Budgeting and program monitoring
- VMS reporting
- The year-end reporting requirement to REAC

SEMINAR NO: 101-024

PRICE: \$800 per person

MATERIALS: *HCV Financial Management Master Book*, NMA pen, pencil, calculator, and bag

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- METHOD:** A group-live seminar featuring PowerPoint, case studies, group discussion, seminar materials (workbook, course book or master book), brainstorming, and Q & A
- LENGTH:** Three days
- AUDIENCE:** Accounting and finance staff and executive directors
- EXAM:** A certification exam is available for \$150
- CREDITS:** **CPE** units w/ exam = 20 **CEU** units w/ exam = 1.6
No prerequisites or advanced preparation required for this seminar

HCV Housing Quality Standards (HQS)

PURPOSE: Maintain strong ties with owners and the community by ensuring inspectors thoroughly understand the required elements of HQS. This 3-day seminar provides information on general room standards, kitchens, bathrooms, electricity, plumbing, and security, including the lead-based paint regulations. Day 3 involves a site inspection and analysis of inspection results focusing on the four SEMAP indicators that relate to HQS inspections.

LEARNING OUTCOMES: Upon completion of the **Housing Choice Voucher (HCV) Housing Quality Standards Seminar**, using HUD regulations and guidance, you should understand:

- What constitutes a decent, safe, and sanitary unit
- Developing local standards and the responsibilities of the inspector
- HUD's requirements for inspectors
- Common Office of Inspector General (OIG) findings in recent audits
- Electricity and security
- Windows, walls, ceilings, floors, interior, and kitchen
- Bathrooms
- Building exterior
- Heating and plumbing
- General health and safety
- Lead-based paint regulations
- SEMAP performance indicators for HQS
- How to conduct an on-site inspection

SEMINAR NO: 101-027

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- PRICE:** \$800 per person
- MATERIALS:** *HCV Housing Quality Standards Master Book*, *A Good Place to Live* book, housing quality standards study guide and answer sheet, HUD inspection form (HUD-52580-a) (OCE), "Improving Test Taking Skills," NMA pen, pencil, and bag
- METHOD:** A group-live seminar featuring PowerPoint, case studies, videos, group discussion, seminar materials (master book and HUD regulations book), and Q & A. Also includes an on-site inspection.
- LENGTH:** Three days
- AUDIENCE:** HQS Staff
- EXAM:** A certification exam is available for \$150
- CREDITS:** **CPE** units w/ exam = 22 **CEU** units w/ exam = 1.8
No prerequisites or advanced preparation required for this seminar

HCV Occupancy

PURPOSE: This is a core 3-day seminar designed to help you meet HUD requirements for the daily case management and administration of all occupancy functions from voucher assistance through terminations.

LEARNING OUTCOMES: Upon completion of the **HCV Occupancy Seminar**, using HUD regulations and guidance, you should be able to:

When you have completed the **Occupancy** portion of the seminar, you should be able to:

- Demonstrate knowledge of the process of voucher issuance from discussion, case study, and narrative instruction
 - Determine how subsidy standards affect voucher size
 - Discuss mandatory and optional practices for voucher issuance, extensions, and suspensions
 - Identify the family briefing requirements including oral briefing, briefing packet, and family responsibilities
- Understand the leasing process in its entirety through narrative instruction, a hands-on learning activity, discussion, and reading
 - Understand pre-leasing requirements for families and owners including RFTA, inspections, and time limits
 - Discuss the mandatory and optional pieces of an owner's lease

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- Analyze the components of the tenancy addendum
 - Discuss mandatory and optional disapproval of owner
 - Analyze the components of the HAP contract
- Evaluate rent to owner using narrative instruction, calculation, and discussion
 - Calculate maximum rent at initial occupancy
 - Discuss different processes for determining rent reasonableness
- List and define annual activities through discussion and narrative instruction
 - Determine PHA and family responsibilities regarding annual re-exams and interims
 - Discuss how PHA policy and HUD regulations affect moves
 - Identify when inspections must occur and the mandatory pieces of these inspections
- Analyze reasons for terminations and the informal hearing process through discussion and narrative instruction
 - Discuss the “musts” and the “mays” of termination in the HCV program
 - Understand reasons for termination of HAP payments or contracts
 - Understand reasons for informal hearings and how to conduct them
- Demonstrate knowledge of portability, the challenges it presents, and the expectations for housing authorities on both ends of the process through narrative instruction, a learning activity, using form 52665, and discussion
 - Identify restrictions on portability including the residency restriction and income limits
 - Determine reasons to deny portability as well as improper denials and their consequences
 - Identify and discuss the responsibilities of the family, IHA, and RHA through the portability process
 - Discuss the proper billing schedule including consequences for violation of HUD billing guidelines

SEMINAR NO: 101-022

PRICE: \$800 per person

MATERIALS: *HCV Occupancy Workbook*, *HUD References Course Book*, portability forms, NMA pen, pencil, and bag

METHOD: A group-live seminar featuring PowerPoint, case studies, group discussion, seminar materials (workbook, course book or master book), brainstorming, and Q & A.

LENGTH: Three days

AUDIENCE: Occupancy specialists, HCV managers, and HCV supervisors

Seminar Catalog

- EXAM:** A certification exam is available for \$150
- CREDITS:** **CPE** units w/ exam = 21 **CEU** units w/ exam = 1.8
- No prerequisites or advanced preparation required for this seminar

HCV Regulatory Management

PURPOSE: This seminar has been completely revised and updated! With so many program areas receiving such scrutiny today, how can housing agencies effectively juggle priorities? This comprehensive 5-day seminar can help. Focusing on key program regulations, requirements, and measurements, managers can learn to monitor agency performance more effectively and respond more quickly to housing agency needs. This intense seminar covers a broad range of program requirements including:

- Eligibility
- Occupancy
- Calculations
- Portability
- SEMAP
- Quality control and more

LEARNING OUTCOMES: Upon completion of the **Housing Choice Voucher (HCV) Regulatory Management Seminar**, using HUD regulations and guidance, you should be able to:

- Apply new management knowledge to the HCV Program
- Administer regulations governing the operation of the program
- Understand key program regulations, requirements, and measurements
- Manage the program in compliance with HUD requirements

SEMINAR NO: 101-045

PRICE: \$1300 per person

MATERIALS: CD with NMA's exclusive program administration tools, *HCV Regulatory Management Workbook*, "Improving Test Taking Skills," NMA pen, pencil, calculator, and bag

METHOD: A group-live seminar featuring PowerPoint, case studies, group discussion, seminar materials (workbook, course book or master book), brainstorming, and Q & A

LENGTH: Five days

AUDIENCE: HCV managers, HCV supervisors, and occupancy specialists

EXAM: Registration includes certification exam

Seminar Catalog

CREDITS: CPE units w/ exam = 48 CEU units w/ exam = 3.4
No prerequisites or advanced preparation required for this seminar

HCV Rent Calculation

PURPOSE: With this solid, hands-on 3-day seminar in better rent calculation performance, you and your staff can beat the clock of HUD's nationwide visits by RIM (Rental Integrity Monitoring) and improve your PHA's scores on two SEMAP indicators.

LEARNING OUTCOMES: Upon completion of the **Housing Choice Voucher (HCV) Rent Calculation Seminar**, using HUD regulations and guidance, you should be able to:

Annual Income

- Identify the types of income that must be included in or excluded from annual income using 24 CFR 5.609, Section 7 of the 50058, learning activities, and narrative instruction
 - Identify types of income that are included and types that are excluded from annual income, including federally mandated exclusions
 - Determine when to impute sanctioned welfare, calculate the amount, and how to offset imputed welfare with new income
 - Determine how to treat different types of income including self employment, seasonal, sporadic, periodic payments, and lump sums
 - Calculate the incremental increase for training program income and understand when to exclude that incremental increase
 - Calculate annual income including annualizing income figures, rounding, and net vs. gross income

EID

- Calculate and track the earned income disallowance (EID) using 24 CFR, NMA's EID worksheet, learning activities, discussion, and narrative instruction
 - Identify the three qualifying criteria to receive the EID as well as the differences in initial qualification for persons in the HCV and public housing programs
 - Calculate the incremental increase
 - Identify challenges and strategies for tracking EID in both the initial exclusion period and the phase-in

Seminar Catalog

Assets

- Identify assets and calculate income from assets using 24 CFR, Section 6 of the 50058, learning activities, and narrative instruction
 - Calculate the cash value, market value, and anticipated income of assets
 - Calculate imputed asset income when the total cash value of assets exceeds \$5000
 - Identify which assets are included and which are not
 - Calculate the market and cash values and the net rental income for rental property
 - Identify assets disposed of for less than fair market value and calculate the amount to be imputed for two years from the date of sale

Adjusted Income

- Calculate adjusted income by correctly deducting HUD-defined allowances and expenses from annual income using 24 CFR, Section 8 of the 50058, learning activities and narrative instruction
 - Identify who qualifies for the dependent and elderly/disabled allowances
 - Calculate the childcare allowance, the income cap (when it applies), and identify who qualifies and what expenses qualify for the deduction
 - Calculate the disability assistance expense, income cap, 3% threshold, and identify who qualifies and what expenses qualify for the deduction
 - Calculate the medical expense deduction, 3% threshold, and identify who qualifies and how to set policies for what expenses qualify
 - Determine how family composition effects qualifications for a deduction and calculate adjusted income using the 5 major HUD deductions

Verification

- Recognize the requirements for verification of income, allowances, and expenses using the HUD verification guidebook and narrative instruction
 - Discuss HUD's verification hierarchy and how it relates to PHA practice
 - Understand the importance of documentation in the verification process
 - Identify the role of HUD's EIV system and when to use it in the verification process

Rent Calculation

- Calculate rent using annual and adjusted income in learning activities using Sections 9, 10, and 12 of the 50058 as well as narrative instruction
 - Calculate TTP using total monthly income, minimum rent, welfare rent, and adjusted monthly income

Seminar Catalog

- Determine the role of the utility allowance and when a family would receive a utility reimbursement payment
- Demonstrate an awareness of the minimum rent range and the process for minimum rent hardship exemptions
- Calculate the components of rent for the HCV program including payment standards, HAP, affordability, and family share
- Calculate prorated rent for mixed families

SEMINAR NO: 101-021

PRICE: \$800 per person

MATERIALS: *HCV Rent Calculation Workbook, HCV HUD References Course Book, 50058 forms for HCV rent calculation, NMA pen, pencil, calculator, and bag*

METHOD: A group-live seminar featuring PowerPoint, case studies, group discussion, seminar materials (workbook, course book or master book), brainstorming, and Q & A

LENGTH: Three days

AUDIENCE: Occupancy specialists, reexamination specialists, and quality control officers

EXAM: A certification exam is available for \$150

CREDITS: **CPE** units w/ exam = 18 **CEU** units w/ exam = 1.5

No prerequisites or advanced preparation required for this seminar

HCV Specialist

PURPOSE: Get three NMA seminars: eligibility, rent calculation, and occupancy, all rolled into one! In one week, participants can acquire the knowledge they need to do their job. This is a must-attend for your staff.

Upon completion of the **HCV Specialist Seminar**, using HUD regulations and guidance, you should be able to:

- Correctly determine family eligibility for the HCV program
- Perform required occupancy activities for families participating in the HCV program
- Calculate rent for families participating in the HCV program

When you have completed the **Eligibility** portion of the seminar, you should be able to:

- Demonstrate knowledge of basic HCV program information through discussion and directed instruction

Seminar Catalog

- Identify the key roles and relationships in the HCV program
 - Read HUD notices, regulations, and other resources with a focus on critical information
 - Be aware of PHA responsibilities and owner responsibilities throughout the program
- Apply HUD requirements regarding fair housing to the HCV program operations using case studies, discussion, and narrative instruction
- Recognize all of the factors of eligibility and how they affect families as they apply to the PHA by narrative instruction, case study, and discussion
 - Identify the different family types that HUD defines
 - Understand and utilize required HUD forms
 - Discuss and demonstrate understanding of the process to verify social security numbers or the absence of those numbers
 - Categorize the different types of citizenship status of applicants as well as the resulting types of families
 - Discuss income limits and how they play a role in the eligibility process
 - Review the student rule and discuss how it applies to eligibility in the HCV program
- Discuss wait list management as it applies to application, preferences, and removal through discussion, narrative instruction, and case studies
 - Discuss the initial application process and how it functions in the housing authority
 - Understand how to organize wait lists including special admissions and targeted funding
 - Follow the process for removal from the wait list
 - Examine the different preferences that the PHA can have for placement on the waiting list
- Examine the final eligibility determination stage through discussion, narrative instruction, case studies, and examination of the Screening and Eviction Rule
 - Examine the full application stage of final eligibility determination including the interview and timelines
 - Identify reasons to deny admission both mandatory and discretionary, including a discussion of the Screening and Eviction Rule
 - Discuss the process leading up to conducting informal reviews

When you have completed the **Occupancy** portion of the seminar, you should be able to:

- Demonstrate knowledge of the process of voucher issuance from discussion, case study, and narrative instruction
 - Determine how subsidy standards affect voucher size

Seminar Catalog

- Discuss mandatory and optional practices for voucher issuance, extensions, and suspensions
 - Identify the family briefing requirements including oral briefing, briefing packet, and family responsibilities
- Understand the leasing process in its entirety through narrative instruction, a hands-on learning activity, discussion, and reading
 - Understand pre-leasing requirements for families and owners including RFTA, inspections, and time limits
 - Discuss the mandatory and optional pieces of an owner's lease
 - Analyze the components of the tenancy addendum
 - Discuss mandatory and optional disapproval of owner
 - Analyze the components of the HAP contract
- Evaluate rent to owner using narrative instruction, calculation, and discussion
 - Calculate maximum rent at initial occupancy
 - Discuss different processes for determining rent reasonableness
- List and define annual activities through discussion and narrative instruction
 - Determine PHA and family responsibilities regarding annual re-exams and interims
 - Discuss how PHA policy and HUD regulations affect moves
 - Identify when inspections must occur and the mandatory pieces of these inspections
- Analyze reasons for terminations and the informal hearing process through discussion and narrative instruction
 - Discuss the “musts” and the “mays” of termination in the HCV program
 - Understand reasons for termination of HAP payments or contracts
 - Understand reasons for informal hearings and how to conduct them
- Demonstrate knowledge of portability, the challenges it presents, and the expectations for housing authorities on both ends of the process through narrative instruction, a learning activity, using form 52665, and discussion
 - Identify restrictions on portability including the residency restriction and income limits
 - Determine reasons to deny portability as well as improper denials and their consequences
 - Identify and discuss the responsibilities of the family, IHA, and RHA through the portability process
 - Discuss the proper billing schedule including consequences for violation of HUD billing guidelines

Seminar Catalog

When you have completed the **Rent Calculation** portion of the seminar, you should be able to:

- Identify the types of income that must be included in or excluded from annual income using 24 CFR 5.609, Section 7 of the 50058, learning activities, and narrative instruction
 - Identify types of income that are included and types that are excluded from annual income, including federally mandated exclusions
 - Determine when to impute sanctioned welfare, calculate the imputed amount, and understand how to offset imputed welfare with new income
 - Determine how to treat different types of income including self-employment, seasonal, sporadic, periodic payments, and lump sums
 - Calculate the incremental increase for state and local training program income and understand when to exclude that incremental increase
 - Calculate annual income including annualizing income figures, rounding, and net vs. gross income
- Calculate and track the earned income disallowance (EID) using 24 CFR, NMA's EID worksheet, learning activities, discussion, and narrative instruction
 - Identify the three individual qualifying criteria to receive the EID as well as the differences in initial qualification for persons in the HCV and public housing programs
 - Calculate the incremental increase
 - Identify challenges and strategies for tracking EID in both the initial exclusion period and the phase-in
- Identify assets and calculate income from assets using 24 CFR, Section 6 of the 50058, learning activities, and narrative instruction
 - Calculate the cash value, market value, and anticipated income of assets
 - Calculate imputed asset income when the total cash value of assets exceeds \$5000
 - Identify which assets are included and which are not
 - Calculate the market and cash values and the net rental income for rental property
 - Identify assets disposed of for less than fair market value and calculate the amount to be imputed for two years from the date of sale
- Calculate adjusted income by correctly deducting HUD-defined allowances and expenses from annual income using 24 CFR, Section 8 of the 50058, learning activities, and narrative instruction
 - Identify who qualifies for the dependent and elderly/disabled allowances
 - Calculate the childcare allowance, the income cap (when it applies) and identify who qualifies and what expenses qualify for the deduction

Seminar Catalog

- Calculate the disability assistance expense, income cap, 3% threshold, and identify who qualifies and what expenses qualify for the deduction
- Calculate the medical expense deduction, 3% threshold, and identify who qualifies and how to set policies for what expenses qualify
- Determine how family composition affects qualifications for a deduction and calculate adjusted income using the 5 major HUD deductions
- Recognize the requirements for verification of income, allowances, and expenses using the HUD verification guidebook and narrative instruction
 - Discuss HUD's verification hierarchy and how it relates to PHA practice
 - Understand the importance of documentation in the verification process
 - Identify the role of HUD's EIV system and when to use it in the verification process
- Calculate rent using annual and adjusted income in learning activities using Sections 9, 10, and 12 of the 50058 as well as narrative instruction
 - Calculate TTP using total monthly income, minimum rent, welfare rent, and adjusted monthly income
 - Determine the role of the utility allowance and when a family would receive a utility reimbursement payment
 - Demonstrate an awareness of the minimum rent range and the process for minimum rent hardship exemptions
 - Calculate the components of rent for the HCV program including payment standards, HAP, affordability, and family share
 - Calculate prorated rent for mixed families

SEMINAR NO: 101-100

PRICE: \$1300 per person

MATERIALS: *HCV Specialist Workbook 1: Eligibility and Occupancy, HCV Specialist Workbook 2: Rent Calculation, HCV HUD References Course Book, 50058 forms, NMA pen, pencil, calculator, and bag*

METHOD: A group-live seminar featuring PowerPoint, case studies, group discussion, seminar materials (workbook, course book or master book), brainstorming, and Q & A

LENGTH: Five days

AUDIENCE: Occupancy specialists, reexamination specialists, eligibility specialists, waiting list specialists, HCV supervisors, and HCV managers

EXAM: Registration includes certification exam

CREDITS: **CPE** units w/ exam = 39 **CEU** units w/ exam = 3.2

Seminar Catalog

No prerequisites or advanced preparation required for this seminar

Seminar Catalog

Public Housing Seminars



Seminar Catalog

Calculating & Planning for Operating Subsidy

PURPOSE: The transformation of public housing from entity-wide management to asset management represents one of the biggest changes in the operation of public housing since its inception. A fundamental change because of PHA conversion to asset management is the focus on projects. As part of this change, you must calculate and fund operating subsidy at the project level. Given by true experts on the transition to project-based management, our team consists of an exemplary accounting group, including Ray Adair, CGFM and Ron Urlaub, CPA. This two-day seminar provides the essentials you will need in order to calculate operating subsidy at the project level.

SEMINAR NO: 101-014

PRICE: \$675 per person

MATERIALS: *Public Housing Operating Fund Workbook*, NMA pen, pencil, calculator, and bag

METHOD: A group-live seminar featuring PowerPoint, case studies, group discussion, seminar materials (workbook, course book or master book), brainstorming, and Q & A

LENGTH: Two days

AUDIENCE: Accounting and finance professionals

EXAM: No exam available for this seminar

CREDITS: **CPE** units w/o exam = 16 **CEU** units w/ exam = 1.4

No prerequisites or advanced preparation required for this seminar

Capital Improvement Fund

PURPOSE: If you are a public housing asset/site manager, modernization coordinator, physical needs assessment inspector, maintenance supervisor, or AMP manager, this 2-day seminar is essential. Learn how to administer capital funds with new, improved techniques for allocations, identifying program requirements, cost eligibilities, PHA analysis, rehabilitation and maintenance goals, working with contractors and architects, bidding, and more. It has never been more important to understand the concepts of asset sustainability as budgets continue to shrink.

LEARNING OUTCOMES: Upon completion of the **Capital Improvement Fund Seminar**, using HUD regulations and guidance, you should understand:

- An overview of capital improvements
- Project-based considerations, including the planning process
- Long-term planning for viability and sustainability

Seminar Catalog

- Physical needs assessments
- The asset management model for modernization needs
- How “green” fits into modernization
- Prioritizing needed work, including lifecycle and cost estimates
- Developing a cost benefit analysis for materials selection
- The project-based plan, including maintenance and management goals
- Forms and documents
- How to use project tracking tools (i.e., Microsoft Project)
- The nuts and bolts, including construction specifications, inspections of work, and construction standards
- The temporary regulatory requirements resulting from ARRA, stimulus funds, and the “Buy American” provision
- Working with residents and community groups, architects, contractors, and building departments

SEMINAR NO: 101-011

PRICE: \$675 per person

MATERIALS: *Capital Fund Program Course Book, Capital Fund Program Appendices Course Book, NMA pen, pencil, and bag*

METHOD: A group-live seminar featuring PowerPoint, case studies, group discussion, seminar materials (course books), group exercise, and Q & A

LENGTH: Two days

AUDIENCE: Public housing asset/site managers, modernization coordinators, senior inspectors, and maintenance supervisors, and AMP managers

EXAM: A certification exam is available for \$150

CREDITS: **CPE** units w/ exam = 14 **CEU** units w/ exam = 1.2

No prerequisites or advanced preparation required for this seminar

PHAS & AMP Performance Measures

PURPOSE: This seminar covers the covers the proposed PHAS and project-based performance measures. HUD has informed PHAs that the final rule, expected to be published in early 2010, will be very close to the proposed rule. Housing authorities need to drill relevant PHAS indicators down to the project level, and property managers need to understand these indicators and report on their project's performance. HUD's new PHAS tool will be introduced. Knowing how your projects and your agency are

Seminar Catalog

really doing must be based on quality data. This quality data includes PHAS tracking, with essential source documents that are accurate and timely. The new PHAS will force the PHA to strategically apply a comprehensive set of criteria to the projects and the program as a whole. This seminar offers strategies for improving all performance criteria.

LEARNING OBJECTIVES: Upon completion of the **PHAS and PHA Performance Measures Seminar**, using HUD regulations and guidance, you should understand:

- The new project-based PHAS as proposed (final rule expected early 2010).
- PHAS assessment, referral and enforcement
- Physical condition, including assessment and standards, Uniform Physical Condition Standards (UPCS), scoring, and physical condition from a project-based perspective
- Financial condition, including assessment, standards (quick ratio, number of months expendable net assets ratio, debt service coverage ratio), and financial condition from a project-based perspective
- Management operations, including assessment, performance standards (vacancy rate, turnaround time, tenant-generated work orders, unit inspections, security, economic self-sufficiency, rent collection, utility consumption, resident involvement in project administration, appearance and market appeal), and management operations from a project-based perspective
- The capital fund obligation and expenditure as the fourth indicator under the new PHAS
- HUD audits and reviews, including FHEO audits (reasonable accommodation and VAWA), RIM reviews, and community service
- Quality data and source documentation, including PHA policies and plans at the property level.

SEMINAR NO: 101-007

PRICE: \$675 per person

MATERIALS: *AMP Performance Measures Workbook, Public Housing Assessment System (PHAS) Master Book*, NMA pen, pencil, calculator, and bag

METHOD: A group-live seminar featuring PowerPoint, case studies, group discussion, seminar materials (workbook, course book or master book), brainstorming, and Q & A

LENGTH: Two days

AUDIENCE: PHAS coordinators, public housing directors, public housing managers, and public housing supervisors

EXAM: No certification exam for this seminar

Seminar Catalog

CREDITS: CPE units w/o exam = 16 CEU units w/o exam = 1.4
No prerequisites or advanced preparation required for this seminar

Project-Based Accounting for PHAs

PURPOSE: This four-day seminar is packed with the latest information regarding project-based budgeting, accounting, and reporting. With a focus on the practical application of project-based financial management and reporting, you can learn how to prepare project-based budgets, how fee-for-service will be applied, the concept of central office cost center (COCC) vs. cost pool, and how to determine front line costs vs. fee costs, including how these costs are recovered. You can also learn how excess cash will be determined and how it may be used, the requirements for capital fund reporting, and the year-end project level reporting requirements to REAC. In addition, this seminar covers the new operating fund formula with the goal of helping you understand how HUD will determine your operating subsidy. If you are looking for a comprehensive seminar, this seminar will provide you with the latest information regarding project-based budgeting, accounting, and year-end closing.

About Our Trainers: Given by true experts on the transition to project-based management, this seminar is taught by an exemplary accounting group, including Ray Adair, CGFM, and Ron Urlaub, CPA. This team assisted HUD in writing the accounting and financial reporting handbook for the implementation of project based budgeting, accounting, and reporting.

SEMINAR NO: 101-003

PRICE: \$925 per person

MATERIALS: *Project-Based Accounting for PHAs Master Book*, FDS line definitions and crosswalk guide, NMA pen, pencil, calculator, and bag

METHOD: A group-live seminar featuring PowerPoint, case studies, group discussion, seminar materials (master book), and Q & A

LENGTH: Four days

AUDIENCE: Finance staff, executive directors, project and asset managers, and non-financial staff

EXAM: A certification exam is available for \$150

CREDITS: CPE units w/ exam = 31 CEU units w/ exam = 2.6
No prerequisites or advanced preparation required for this seminar

Seminar Catalog

Project-Based Management (PBM) Essentials for Property Managers

PURPOSE: As PHAs transition to project-based accounting, budgeting, and management (PBM), highly skilled staff at the sites are going to be a “make-it or break it” factor of success for the project and the public housing program. In order to ensure a viable project, property managers need to be business managers: they must know how to analyze and monitor financial reports and the budget, understand the importance of keeping units leased and rents collected, apply effective marketing strategies, and manage project-based PHAS criteria. Effective supervision at the project, including quality control, is crucial to ensure productivity. In this seminar, you can learn all this in addition to other valuable topics such as lease enforcement, terminations, property management, PHAS, and nondiscrimination requirements.

LEARNING OUTCOMES: Upon completion of the **Project-Based Management (PBM) Essentials for Property Managers Seminar**, using HUD regulations and guidance, you should be able to:

- Recognize the fundamentals of property management
- Apply HUD’s new project-based model to your program
- Define HUD’s nondiscrimination requirements as they relate to public housing
- Explain the presence and use of different lease provisions
- Apply PHAS performance measurements to daily project operations
- Use the basics of the project’s finances and identify types fees paid by the project
- Analyze budget decisions
- Apply the fundamentals of contract management using the basics of procurement
- Identify key reports of project performance
- Identify the elements of effective supervision

SEMINAR NO: 101-056

MATERIALS: *Project-Based Management Essentials Workbook*, PBM for Property Managers Reference Material, NMA pen, pencil, calculator, and bag

METHOD: A group-live seminar featuring PowerPoint, case studies, group discussion, seminar materials (workbook, course book or master book), brainstorming, and Q & A

LENGTH: Three days

AUDIENCE: Project, asset, and property managers

EXAM: A certification exam is available for \$150

CREDITS: **CPE** units w/ exam = 23 **CEU** units w/ exam = 1.9

Prerequisites: Basic knowledge of property management.

Seminar Catalog

Public Housing Asset Management for Executives

PURPOSE: This seminar is the perfect launch for a PHA leader and a timely strategic check-up for veterans. Putting it all together in a project-based and asset management model, this seminar can teach you to reevaluate your public housing portfolio and plan strategically. Leverage and expand your resources through entrepreneurial business development, including setting up nonprofit, public and private partnerships, and developing new types of housing such as mixed income and tax credit housing. Master and manage project-based PHAS and asset management criteria. Understanding how the projects pay for all services and central offices costs is a must to oversee management of the projects, the portfolio as a whole, and to strategically position your PHA for financial viability. This seminar is an intensive four days with a certification examination on the fifth day.

LEARNING OUTCOMES: Upon completion of the **Public Housing Asset Management for Executives Seminar**, using HUD regulations and guidance, you should understand:

- An organizational overview
- Policies and policy development
- Private sector principles in public housing management
- Finance for the public housing director – the operating subsidy
- Entrepreneurial strategies
- Managing nondiscrimination and improving customer service
- The new project-based PHAS
- Managing income integrity improvement
- Strategic thinking and quality control
- Ethics and leadership

SEMINAR NO: 101-047

PRICE: \$1300 per person

MATERIALS: *Public Housing Asset Management for Executives Course Book*, PH executive management independent project, “Improving Test Taking Skills,” Strength Deployment Inventory, NMA pen, pencil, calculator, and bag

METHOD: A group-live seminar featuring PowerPoint, case studies, group discussion, seminar materials (workbook, course book or master book), brainstorming, and Q & A

LENGTH: Five days

AUDIENCE: Executive directors, PH directors, asset managers, supervisors, and analysts

EXAM: Registration includes certification exam

Seminar Catalog

CREDITS: CPE units w/ exam = 37 CEU units w/ exam = 3.1
Prerequisites: Knowledge of public housing programs and or basic management principles

Public Housing Eligibility

PURPOSE: The purpose of this seminar is to teach students how to determine the correct family eligibility for public housing.

LEARNING OUTCOMES: Upon completion of the **Public Housing Eligibility Seminar**, you should be able to:

- Demonstrate knowledge of basic public housing program information through discussion and directed instruction
 - Identify the key roles and relationships in public housing
 - Read HUD notices, regulations, and other resources with a focus on critical information
 - Discuss internal documents that govern PHA practice such as the ACOP, PHA plan, and lease
 - Examine an overview of the housing process
- Apply HUD requirements regarding fair housing to public housing program operations using case studies, discussion, and narrative instruction
- Recognize all of the factors of eligibility and how they affect families as they apply to the PHA by narrative instruction, case study, and discussion
 - Identify the different family types that HUD defines
 - Discuss and demonstrate an understanding of the process to verify social security numbers or the absence of those numbers
 - Categorize the different types of citizenship status of applicants as well as the resulting types of families
 - Discuss income limits and how they play a role in the eligibility process
 - Determine how occupancy standards dictate the type of project, size of unit, and type of unit
- Discuss waiting list management as it applies to application, preferences, and removal through discussion, narrative instruction, and case studies
 - Discuss the initial application process and how it functions in your housing authority
 - Follow the process for removal from the waiting list

Seminar Catalog

- Understand how to organize waiting lists including site-based waiting lists
- Examine the different preferences that your housing authority can have for placement on the waiting list
- Examine tenant selection including income targeting and deconcentration of poverty
- Examine the final eligibility determination stage through discussion, narrative instruction, case studies, and examination of the Screening and Eviction Rule
 - Recognize the forms that are involved in the eligibility process
 - Identify both mandatory and discretionary reasons to deny admission, including a discussion of the Screening and Eviction Rule
 - Evaluate suitability using standards and prohibitions for admission
 - Describe the process of obtaining and using criminal records under the Screening and Eviction Rule for determining eligibility and suitability
 - Discuss the process leading up to conducting informal hearings
 - Determine the admission process including unit offer systems

SEMINAR NO: 101-012

PRICE: \$675 per person

MATERIALS: *Public Housing Eligibility Workbook, Public Housing HUD References Course Book, NMA pen, pencil, and bag*

METHOD: A group-live seminar featuring PowerPoint, case studies, group discussion, seminar materials (workbook, course book or master book), brainstorming, and Q & A

LENGTH: Two days

AUDIENCE: Eligibility specialists, waiting list supervisors, and public housing staff

EXAM: A certification exam is available for \$150

CREDITS: **CPE** units w/ exam = 13 **CEU** units w/ exam = 1.1

No prerequisites or advanced preparation required for this seminar

Project-Based Maintenance Management

PURPOSE: Are you managing maintenance or is maintenance managing you? This 3-day interactive seminar will help you take control of the maintenance monster. From the basics of setting standards and expectations and developing preventative maintenance systems to completing a HUD required maintenance plan, this is a must-have learning experience. Information you need to run a successful maintenance operation is covered in this seminar, including labor repair time standards, quality control, mold, lead-based paint, and automated systems.

Seminar Catalog

LEARNING OUTCOMES: Upon completion of the **Project-Based Maintenance Management Seminar**, you should understand:

- The Site/AMP manager's new roles and responsibilities for maintenance at their site
- Elements of maintenance and maintenance management
- Outcomes of good maintenance management
- Planning and focusing your work
- Work standards, such as UPCS and industry standards
- Funding and budgeting
- Asset management/capital improvement fund
- Customer service
- How to communicate to and motivate maintenance staff
- Personnel, including selection, testing, training, and directing
- Personal safety on the job, including power tools, chemicals, climbing and lifting, and insurance/reporting
- Tracking and documentation – automated/manual, including work orders, purchasing, inventory, and PHAS
- Property management and maintenance management, including objectives, priorities, and the big picture
- Maintenance plan development

SEMINAR NO: 101-049

PRICE: \$675 per person

MATERIALS: *Project-Based Maintenance Management Course Book*, NMA pen, pencil, and bag

METHOD: A group-live seminar featuring PowerPoint, case studies, videos, group discussion, group exercises, seminar materials (course book), and Q & A

LENGTH: Two days

AUDIENCE: Asset/site managers and managers responsible for development maintenance

EXAM: A certification exam is available for \$150

CREDITS: **CPE** units w/ exam = 23 **CEU** units w/ exam = 1.9

No prerequisites or advanced preparation required for this seminar

Seminar Catalog

Public Housing Management

PURPOSE: This seminar, more than ever, is important for every new director or asset manager and for all property managers. Under project-based and asset management, the role of the property manager will require many additional skills, more responsibility, and more accountability. PHM provides an overview of all the HUD regulations and requirements needed to manage the project and the program as a whole. Financial aspects and the physical performance of your projects are emphasized. These include the basics of project budgets and accounts, understanding the fees paid by the projects, the collection of receivables, and vacancy reduction. As a property manager, you need to understand project-based PHAS performance measures and how to assess them. By attending, you will also learn HUD regulations concerning eligibility and rent calculation and learn the practical steps to avoid discriminatory practices, to enforce the lease (and community service), and to supervise.

LEARNING OUTCOMES: Upon completion of the **Public Housing Management Seminar**, you should be able to:

- **Demonstrate knowledge of basic public housing program information.**
 - Identify the key roles and relationships in public housing.
 - Explore the program within the context of historically significant events and legislation such as the Brooke Amendment and QHWRA.
 - Learn to read HUD notices, regulations and other resources with a focus on critical information.
 - Discuss internal documents that govern PHA practice such as the ACOP, PHA plan, and lease.
 - Examine an overview of the housing process with a focus on management roles.
 - Look at the process for the asset management model with a focus on the project.
- **Apply HUD requirements regarding fair housing to public housing program operations using case studies and discussion.**
 - Examine and discuss principles of civil rights and fair housing laws.
 - Explore the requirements, elements, and process of requests for accommodation on behalf of or by persons with disabilities.
 - Recognize the difference between HUD's definition of disability and the ADA's broader definition of disability.
 - Identify and think through the reasonable accommodation process through discussion and examples.

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- Demonstrate a working knowledge of HUD's factors for compliance assessment under HUD's Limited English Proficiency (LEP) guidance.
- Understand PHA legal mandates under the Violence against Women Reauthorization Act (VAWA) by reading parts of the VAWA legislation.
- **Recognize the factors of eligibility and how they affect families when they apply to the PHA.**
 - Identify the different family types defined by HUD.
 - Demonstrate an understanding of the process to verify social security numbers or the absence of those numbers.
 - Categorize the different types of citizenship status of applicants as well as the resulting categories of families.
 - Discuss income limits and their role in the eligibility process.
 - Determine how occupancy standards guide project type, size of unit and the type of unit offered.
 - Examine optional preferences PHAs may establish for placement on the waiting list.
 - Identify the functions of managing the waiting list, including site-based waiting lists.
- **Discuss tenant selection as it applies to application and removal from the waiting list.**
 - Examine tenant selection including income targeting and deconcentration of poverty.
 - Identify reasons to deny admission, both mandatory and discretionary.
 - Evaluate suitability, using standards and prohibitions for admission.
 - Discuss procedures and requirements regarding how to handle criminal background records.
 - Discuss the process leading up to conducting informal hearings.
 - Explore the requirements and processes of making unit offers.
- **Calculate rent in accordance with 24 CFR and individual PHA policy.**
 - Identify the types of income that must be included in or excluded from annual income using 24 CFR 5.609 and section 7 of the 50058
 - Calculate and track the earned income disallowance (EID) using NMA's EID worksheet.
 - Identify assets and calculate income from assets using section 6 of the 50058.
 - Calculate adjusted income by correctly deducting HUD-defined allowances and expenses from annual income using 24 CFR and section 8 of the 50058.
 - Calculate rent using annual and adjusted income in learning activities using sections 9 and 10 of the 50058.
- **Understand the leasing process from orientation to move-in.**

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- Determine how to prepare for lease up including resident orientation and inspections.
- Identify key provisions of the lease in order to explain and fulfill PHA obligations, educate tenants regarding their obligations, and enforce the lease.
- Understand the lease enforcement process.
- Identify requirements and restrictions for pets in public housing, including a discussion of service animals.
- **Discuss the occupancy cycle as it relates to public housing.**
 - Determine PHA and family responsibilities regarding annual reexaminations and interim examinations.
 - Discuss transfers as they relate to PHA policy.
 - Examine community service requirements under QHWRA and how they relate to PHA practice, including types of community service and economic self-sufficiency activities, exemptions, and consequences of noncompliance.
 - Identify mandatory and discretionary criteria for termination of the lease, and identify key functions and steps in the eviction process.
 - Understand the reasons for grievances and the procedures that follow.
- **Identify resident relation strategies to encourage self-sufficiency.**
 - Discuss family self-sufficiency, community service, and economic self-sufficiency strategies and partnerships and their impact to enable families to gain skills, become employed, and achieve economic stability.
- **Understand key elements of managing the project's budget.**
 - Understand the purpose of the project's operating budget.
 - Examine the budget process and its development, including the importance and frequency of monitoring revenue versus expenses.
 - Identify various services provided to the project, and how centralized, allocated, and shared services are paid by the project.
 - Discuss the fees paid by the project to the central office cost center.
 - Understand how occupancy and rent collection impact the financial viability of the project.
 - Identify the decisions and performance of the property manager and staff affect the project's financial performance.
- **Recognize the key components of property management in a public housing setting.**
 - Distinguish the elements of managing the maintenance function, including work orders, preventive maintenance, and inspections.
 - Understand HUD's requirements for property control at the project.

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- Discuss effective capital improvement planning and implementation.
- Explore the role that effective security, emergency response preparedness, and risk management have on the health of a public housing development.
- **Discuss the role of the Public Housing Assessment System (PHAS) as a management tool and as a HUD monitoring system.**
 - Break down the components and performance indicators of PHAS, including physical condition, financial condition, management operations, and the capital fund indicator.
 - Discuss project-based PHAS and how the day-to-day performance of the project translates to PHAS scores.
 - Examine HUD's PHAS evaluation tool and how to incorporate PHAS assessments into the PHA's quality control functions process.
- **Identify the key elements of managing staff.**
 - Discuss the successful transition from employee to supervisor.
 - Emphasize the importance of communication and how to improve it in the management role.
 - Explore the elements and process of effective delegation, to get work done through others as a team.

SEMINAR NO: 101-004

PRICE: \$1300 per person

MATERIALS: *Public Housing Management Workbook, Public Housing Management Master Book, 50058 forms, NMA pen, pencil, calculator, and bag*

METHOD: A group-live seminar featuring PowerPoint, case studies, group discussion, seminar materials including a workbook and master book, and Q & A

LENGTH: Five days

AUDIENCE: Asset managers, property managers, occupancy specialists, and public housing supervisors

EXAM: Registration includes certification exam

CREDITS: **CPE** units w/ exam = 39 **CEU** units w/ exam = 3.2

No prerequisites or advanced preparation required for this seminar

Public Housing Occupancy

PURPOSE: To assist staff in correctly applying HUD regulations to all aspects of public housing tenancy and daily case management.

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LEARNING OUTCOMES: Upon completion of the **Public Housing Occupancy Seminar**, you should be able to:

- Understand the leasing process in its entirety through narrative instruction, a hands-on learning activity, discussion, and reading
 - Determine how to prepare for lease-up including resident orientation and inspections
 - Identify final steps in the leasing process including an explanation of PHA obligations, tenant obligations, and reasons for termination of tenancy
- List and define annual activities through discussion and narrative instruction
 - Determine PHA and family responsibilities regarding annual reexams and interims
 - Examine the community service requirements under QHWRA and how they relate to PHA practice, including types of community service and economic self-sufficiency activities, exemptions, and consequences of noncompliance
 - Discuss transfers as they relate to PHA policy
- Identify requirements and restrictions for pets in public housing through discussion and narrative instruction
 - Determine pet policies for general occupancy developments and identify exceptions for mixed and designated developments
 - Discuss reasonable pet requirements and restrictions
- Analyze reasons for terminations and the informal hearing process through discussion and narrative instruction
 - Determine the reasons for termination by either the PHA or the tenant including identifying definitions related to eviction
 - Discuss the “musts” and the “mays” of termination in the public housing program
 - Discuss the use of criminal records relating to terminations
 - Understand the reasons for grievances and the procedures that follow

SEMINAR NO: 101-002

PRICE: \$800 per person

MATERIALS: *Public Housing Occupancy Workbook Vol. 1, Public Housing Occupancy Workbook Vol. 2, Public Housing HUD References Course Book*, NMA pen, pencil, calculator, and bag

METHOD: A group-live seminar featuring PowerPoint, case studies, group discussion, seminar materials (workbook, course book or master book), brainstorming, and Q & A

LENGTH: Three days

AUDIENCE: Occupancy specialists, property managers, and public housing supervisors

Seminar Catalog

EXAM: A certification exam is available for \$150

CREDITS: **CPE** units w/ exam = 21 **CEU** units w/ exam = 1.8

No prerequisites or advanced preparation required for this seminar

Public Housing Rent Calculation

PURPOSE: This hands-on seminar covers income, assets, adjusted income, income exclusions, minimum rents, tenant rents and more.

LEARNING OUTCOMES: Upon completion of the **Public Housing Rent Calculation Seminar**, you should be able to:

Annual Income

- Identify the types of income that must be included in or excluded from annual income using 24 CFR 5.609, Section 7 of the 50058, learning activities, and narrative instruction
 - Identify types of income that are included and types that are excluded from annual income, including federally mandated exclusions
 - Determine when to impute sanctioned welfare, calculate the amount, and how to offset imputed welfare with new income
 - Determine how to treat different types of income including self employment, seasonal, sporadic, periodic payments, and lump sums
 - Calculate the incremental increase for training program income and understand when to exclude that incremental increase
 - Calculate annual income including annualizing income figures, rounding, and net vs. gross income

EID

- Calculate and track the earned income disallowance (EID) using 24 CFR, NMA's EID worksheet, learning activities, discussion, and narrative instruction
 - Identify the three qualifying criteria to receive the EID as well as the differences in initial qualification for persons in the HCV and public housing programs
 - Calculate the incremental increase
 - Identify challenges and strategies for tracking EID in both the initial exclusion period and the phase-in

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Assets

- Identify assets and calculate income from assets using 24 CFR, Section 6 of the 50058, learning activities, and narrative instruction
 - Calculate the cash value, market value, and anticipated income of assets
 - Calculate imputed asset income when the total cash value of assets exceeds \$5000
 - Identify which assets are included and which are not
 - Calculate the market and cash values and the net rental income for rental property
 - Identify assets disposed of for less than fair market value and calculate the amount to be imputed for two years from the date of sale

Adjusted Income

- Calculate adjusted income by correctly deducting HUD-defined allowances and expenses from annual income using 24 CFR, Section 8 of the 50058, learning activities and narrative instruction
 - Identify who qualifies for the dependent and elderly/disabled allowances
 - Calculate the childcare allowance, the income cap (when it applies), and identify who qualifies and what expenses qualify for the deduction
 - Calculate the disability assistance expense, income cap, 3% threshold, and identify who qualifies and what expenses qualify for the deduction
 - Calculate the medical expense deduction, 3% threshold, and identify who qualifies and how to set policies for what expenses qualify
 - Determine how family composition effects qualifications for a deduction and calculate adjusted income using the 5 major HUD deductions

Verification

- Recognize the requirements for verification of income, allowances, and expenses using the HUD verification guidebook and narrative instruction
 - Discuss HUD's verification hierarchy and how it relates to PHA practice
 - Understand the importance of documentation in the verification process
 - Identify the role of HUD's EIV system and when to use it in the verification process

Rent Calculation

- Calculate rent using annual and adjusted income in learning activities using Sections 9, 10, and 12 of the 50058 as well as narrative instruction

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- Calculate TTP using total monthly income, minimum rent, welfare rent, and adjusted monthly income
- Determine the role of the utility allowance and when a family would receive a utility reimbursement payment
- Demonstrate an awareness of the minimum rent range and the process for minimum rent hardship exemptions
- Calculate and identify the components of rent for the public housing program including tenant rent, flat rent, and ceiling rents
- Calculate prorated rent for mixed families

SEMINAR NO: 101-013

PRICE: \$800 per person

MATERIALS: *Public Housing Rent Calculation Workbook, Public Housing HUD References Course Book, and NMA pen, pencil, calculator, and bag*

METHOD: A group-live seminar featuring PowerPoint, case studies, group discussion, seminar materials (workbook, course book or master book), brainstorming, and Q & A

LENGTH: Three days

AUDIENCE: Occupancy specialists, reexam specialists, and property managers

EXAM: A certification exam is available for \$150

CREDITS: **CPE** units w/ exam = 20 **CEU** units w/ exam = 1.7

No prerequisites or advanced preparation required for this seminar

Public Housing Specialist

PURPOSE: This seminar allows you to learn three NMA seminars—eligibility, rent calculation, and occupancy—in one week! Instead of three separate certification exams, one exam at the end of the seminar allows participants to get high quality, up-to-date training on all three topics.

LEARNING OUTCOMES: Upon completion of the **Public Housing (PH) Specialist Seminar**, using HUD regulations and guidance, you should be able to:

- Correctly determine family eligibility for public housing
- Perform required occupancy activities for public housing residents
- Calculate rent for public housing tenants

When you have completed the **Eligibility** portion of the seminar, you should be able to:

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- Demonstrate knowledge of basic public housing program information through discussion and directed instruction
 - Identify the key roles and relationships in public housing
 - Read HUD notices, regulations, and other resources with a focus on critical information
 - Discuss internal documents that govern PHA practice such as the ACOP, PHA plan, and lease
 - Examine an overview of the housing process
- Apply HUD requirements regarding fair housing to public housing program operations using case studies, discussion, and narrative instruction
 - Recognize all of the factors of eligibility and how they affect families as they apply to the PHA by narrative instruction, case study, and discussion
 - Identify the different family types that HUD defines
 - Discuss and demonstrate an understanding of the process to verify social security numbers or the absence of those numbers
 - Categorize the different types of citizenship status of applicants as well as the resulting types of families
 - Discuss income limits and how they play a role in the eligibility process
 - Determine how occupancy standards dictate the type of project, size of unit, and type of unit
- Discuss waiting list management as it applies to application, preferences, and removal through discussion, narrative instruction, and case studies
 - Discuss the initial application process and how it functions in your housing authority
 - Follow the process for removal from the waiting list
 - Understand how to organize waiting lists including site-based waiting lists
 - Examine the different preferences that your housing authority can have for placement on the waiting list
 - Examine tenant selection including income targeting and deconcentration of poverty
- Examine the final eligibility determination stage through discussion, narrative instruction, case studies, and examination of the Screening and Eviction Rule
 - Recognize the forms that are involved in the eligibility process
 - Identify both mandatory and discretionary reasons to deny admission, including a discussion of the Screening and Eviction Rule
 - Evaluate suitability using standards and prohibitions for admission

Seminar Catalog

- Describe the process of obtaining and using criminal records under the Screening and Eviction Rule for determining eligibility and suitability
- Discuss the process leading up to conducting informal hearings
- Determine the admission process including unit offer systems

When you have completed the **Occupancy** portion of the seminar, you should be able to:

- Understand the leasing process in its entirety through narrative instruction, a hands-on learning activity, discussion, and reading
 - Determine how to prepare for lease-up including resident orientation and inspections
 - Identify final steps in the leasing process including an explanation of PHA obligations, tenant obligations, and reasons for termination of tenancy
- List and define annual activities through discussion and narrative instruction
 - Determine PHA and family responsibilities regarding annual reexams and interims
 - Examine the community service requirements under QHWRA and how they relate to PHA practice, including types of community service and economic self-sufficiency activities, exemptions, and consequences of noncompliance
 - Discuss transfers as they relate to PHA policy
- Identify requirements and restrictions for pets in public housing through discussion and narrative instruction
 - Determine pet policies for general occupancy developments and identify exceptions for mixed and designated developments
 - Discuss reasonable pet requirements and restrictions
- Analyze reasons for terminations and the informal hearing process through discussion and narrative instruction
 - Determine the reasons for termination by either the PHA or the tenant including identifying definitions related to eviction
 - Discuss the “musts” and the “mays” of termination in the public housing program
 - Discuss the use of criminal records relating to terminations
 - Understand the reasons for grievances and the procedures that follow

When you have completed the **Rent Calculation** portion of the seminar, you should be able to:

- Identify the types of income that must be included in or excluded from annual income using 24 CFR 5.609, Section 7 of the 50058, learning activities, and narrative instruction

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- Identify types of income that are included and types that are excluded from annual income, including federally mandated exclusions
- Determine when to impute sanctioned welfare, calculate the imputed amount, and understand how to offset imputed welfare with new income
- Determine how to treat different types of income including self-employment, seasonal income, sporadic income, periodic payments, and lump sums
- Calculate the incremental increase for state and local training program income; understand when to exclude that incremental increase
- Calculate annual income including annualizing income figures, rounding, and net vs. gross income
- Calculate and track the earned income disallowance (EID) using 24 CFR, NMA's EID worksheet, learning activities, discussion, and narrative instruction
 - Identify the three individual qualifying criteria to receive the EID as well as the differences in initial qualification for persons in the public housing program
 - Calculate the incremental increase
 - Identify challenges and strategies for tracking the EID in both the initial exclusion period and the phase-in
- Identify assets and calculate income from assets using 24 CFR, Section 6 of the 50058, learning activities, and narrative instruction
 - Calculate the cash value, market value, and anticipated income of assets
 - Calculate imputed asset income when the total cash value of assets exceeds \$5000
 - Identify which assets are included and which are not
 - Calculate the market and cash values and the net rental income for rental property
 - Identify assets disposed of for less than fair market value and calculate the amount to be imputed for two years from the date of sale
- Calculate adjusted income by correctly deducting HUD-defined allowances and expenses from annual income using 24 CFR, Section 8 of the 50058, learning activities, and narrative instruction
 - Identify who qualifies for the dependent and elderly/disabled allowances
 - Calculate the childcare allowance and the income cap (when it applies), and identify who qualifies and what expenses qualify for the deduction
 - Calculate the disability assistance expense, income cap, and 3 percent threshold, and identify who qualifies and what expenses qualify for the deduction
 - Calculate the medical expense deduction and 3 percent threshold, and identify who qualifies and how to set policies for what expenses qualify

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- Determine how family composition affects qualifications for a deduction and calculate adjusted income using the five major HUD deductions
- Recognize the requirements for verification of income, allowances, and expenses using the HUD verification guidebook and narrative instruction
 - Discuss HUD's verification hierarchy and how it relates to PHA practice
 - Understand the importance of documentation in the verification process
 - Identify the role of HUD's EIV system and when to use it in the verification process
- Calculate rent using annual and adjusted income in learning activities using Sections 9, 10, and 12 of the 50058 as well as narrative instruction
 - Calculate TTP using total monthly income, minimum rent, welfare rent, and adjusted monthly income
 - Determine the role of the utility allowance and when a family would receive a utility reimbursement payment
 - Demonstrate an awareness of the minimum rent range and the process for minimum rent hardship exemptions
 - Calculate and identify the components of rent for the public housing program including tenant rent, flat rent, and ceiling rents
 - Calculate prorated rent for mixed families

SEMINAR NO: 101-102

PRICE: \$1300 per person

MATERIALS: *Public Housing Specialist Workbook 1: Eligibility and Occupancy, Public Housing Specialist Workbook 2: Rent Calculation, Public Housing HUD References Course Book, NMA pen, pencil, calculator, and bag*

METHOD: A group-live seminar featuring PowerPoint, case studies, group discussion, seminar materials (workbook, course book or master book), brainstorming, and Q & A

LENGTH: Five days

AUDIENCE: All public housing staff and supervisors

EXAM: Registration includes certification exam

CREDITS: **CPE** units w/ exam = 39 **CEU** units w/ exam = 3.2

No prerequisites or advanced preparation required for this seminar

Seminar Catalog

Structural Accessibility / HUD-FHEO / 504-UFAS

PURPOSE: This one-day seminar focuses on the accessibility standards for all housing programs using any federal dollars. Federal monies spent on the development of the property, rehabilitation of structures in the real estate portfolio, or support of the residents, makes the property eligible for mandatory compliance under the 504-UFAS requirements. The seminar will also review the differences between fair housing standards for accessibility (used when no federal dollars are involved) and the various other accessibility standards for public buildings.

HUD/FHEO is actively auditing public housing authorities and multi-family developments in an effort to drive accessibility compliance on 504-UFAS and fair housing sites as applicable. In call, we will discuss the current voluntary compliance agreement (VCA) trends and look at a sample of lawsuits brought by HUD/FHEO and The Department of Justice (DOJ) in their efforts to drive compliance with housing providers.

The various tools used to teach this seminar include PowerPoint slides, videos, a workbook, and a CD with 504-UFAS Guidelines and the Inspection Checklist copied for the student to take with them.

SEMINAR NO: 101-061

PRICE: \$450 per person

MATERIALS: CD with 504-UFAS guidelines, Inspection checklist, NMA pen, pencil and bag

METHOD: A group-live seminar featuring PowerPoint, videos, workbook, CD with 504-UFAS Guidelines and Inspection Checklists

LENGTH: One day

AUDIENCE: This seminar has been taught to housing authority and multi-family staff including department/program directors, Capital Fund/modernization directors, development directors, site (AMP) managers, maintenance staff, architects, contractors, attorneys, state finance development staff, non-profit disability advocacy groups, and other interested individuals

EXAM: No certification exam for this seminar

CREDITS: **CPE** units w/ exam = 8.4 **CEU** units w/ exam = 0.8

No prerequisites or advanced preparation required for this seminar

Seminar Catalog

Uniform Physical Condition Standards

PURPOSE: This seminar teaches you the Uniform Physical Condition Standards (UPCS) with a hands-on approach through two days of classroom learning, followed by a third day using a local unit for field inspection and reporting. During the seminar, you will learn how to perform the inspection using NMA's handheld computers. Your trainer will cover several integral topics, including the inspection definitions of UPCS, the REAC process, PASS software, data collection, the inspecting menu, scoring, appeals and more. Note: seminar size is limited, so register as soon as you can.

LEARNING OUTCOMES: Upon completion of the **Uniform Physical Condition Standards Seminar**, using HUD regulations and guidance, you should understand:

- UPCS definitions, including building exterior, systems, common areas, units, and health and safety
- How to plan your workload from inspection to maintenance workflow
- An annual inspection overview, including the physical inspection timetable, contractors or inspectors, preparing for the inspection, and the inspection itself
- The communication of defects including identifying defects to site management staff and site maintenance
- The technical review and appeals
- How to improve your HA/AMP physical PHAS score
- How to increase your odds of a successful scoring appeal

SEMINAR NO: 101-005

PRICE: \$800 per person

MATERIALS: *UPCS/PASS Master Book on CD-ROM, PASS DCD 2.3a User Guide*, UPCS seminar note pads, NMA pen, pencil, and bag

METHOD: A group-live seminar featuring PowerPoint, case studies, group discussion, seminar materials (workbook, course book or master book), Q & A, computer training on touch screen, convertible field computers, and an onsite trip

LENGTH: Three days

AUDIENCE: UPCS inspectors and supervisors, site maintenance, asset inspectors, asset managers and any staff responsible for the physical condition of the housing units

EXAM: A certification exam is available for \$150

CREDITS: **CPE** units w/ exam = 20 **CEU** units w/ exam = 1.6
No prerequisites or advanced preparation required for this seminar

Seminar Catalog

UPCS Fundamentals

PURPOSE: Improve your physical score, know the UPCS! This seminar covers the five areas of inspection items and the defect definitions for each item. You can learn about sites, building exterior, systems, common areas, units, and health and safety. This seminar covers the inspection timeline, the “code of conduct” all REAC inspectors are required to follow, and the technical review/appeal process.

LEARNING OUTCOMES: Upon completion of the **UPCS Fundamentals Seminar**, using HUD regulations and guidance, you should understand:

- UPCS definitions, including building exterior, systems, common areas, units, and health and safety
- How to plan your workload from inspection to maintenance workflow
- An annual inspection overview, including the physical inspection timetable, contractors or inspectors, preparing for the inspection, and the inspection itself
- The communication of defects including identifying defects to site management staff and site maintenance
- The technical review and appeals
- How to improve your HA/AMP physical PHAS score
- How to increase your odds of a successful scoring appeal

SEMINAR NO: 101-015

PRICE: \$675 per person

MATERIALS: *UPCS Quick Check Guide*, UPCS seminar note pads, UPCS handouts (OCE), NMA pen, pencil and bag

METHOD: A group-live seminar featuring PowerPoint, case studies, group discussion, seminar materials (quick check guide), and Q & A

LENGTH: Two days

AUDIENCE: UPCS inspectors and supervisors, site maintenance, asset inspectors, asset managers and any staff responsible for the physical condition of the housing units

EXAM: A certification exam is available online for \$150

CREDITS: **CPE** units w/ exam = 16 **CEU** units w/ exam = 1.3

No prerequisites or advanced preparation required for this seminar

Seminar Catalog

Family Self-Sufficiency Seminars



Seminar Catalog

Family Self-Sufficiency

PURPOSE: Come and explore FSS inside and out, covering the information critical to program success. This 3-day seminar for both HCV and public housing staff presents full program information, including HUD regulations, the coordinating committee, intake, and family selection, contracts, calculating escrow accounts, portability, marketing, and finding private sector resources.

LEARNING OUTCOMES: Upon completion of the **Family Self-Sufficiency (FSS) Seminar**, using HUD regulations and guidance, you should understand:

- Successful use of the program coordinating committee
- FSS intake and family selection, including eligible families, transfers, targeted selections, motivational screening, and denials
- Intake and family selection
- The contract of participation, including contract requirements, individual training and service plans, lease compliance, changes to the contract, and contract planning
- Escrow accounts, including how escrow works, income and rent calculations, impact of income limits, crediting the escrow account, escrow interim, and final disbursements
- Portability, including FSS rules for portability, responsibility of initial and receiving HAs, and contract and escrow account issues
- Case management, including characteristics of effective case managers, the role of the case manager, helping interview versus housing interview, questioning techniques, client intake, client evaluation, case planning, and case managing
- Marketing your FSS program, including finding private sector resources
- Multiple avenues and barriers to self-sufficiency

SEMINAR NO: 101-036

PRICE: \$800 per person

MATERIALS: *Family Self-Sufficiency Master Book*, Escrow Account Credit worksheet, NMA pen, pencil, calculator, and bag

METHOD: A group-live seminar featuring PowerPoint, case studies, group discussion, seminar materials (workbook, course book or master book), brainstorming, and Q & A

LENGTH: Three days

AUDIENCE: FSS coordinators, FSS managers, and case managers

EXAM: A certification exam is available for \$150

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CREDITS: CPE units w/ exam = 21 CEU units w/ exam = 1.7

Self-Sufficiency Case Management

PURPOSE: Provide self-sufficiency staff with the tools to help understand just what it takes to assist a family in moving to economic stability. This 3-day seminar can teach you the FSS basics, including a variety of topics such as key self-sufficiency strategies, community collaboration, problem solving, crisis management, resources and referrals, creative FSS programs, program assessment, and case studies.

LEARNING OUTCOMES: Upon completion of the **Self-Sufficiency Case Management Seminar**, using HUD regulations and guidance, you should understand:

- FSS self-sufficiency welfare reform
- Self-sufficiency in perspective
- Self-sufficiency defined
- Evaluating self-sufficiency programs
- Defining self-sufficiency case management
- The role of planning in case management
- The case management process, including intake and assessment, goal setting and resources, and monitoring and completion
- Effective communication in case management
- Crisis management for case managers
- Self-sufficiency community mandate and partners
- Self-sufficiency program design
- Creative FSS programs—cultural proficiency and collaboration
- Designing and redesigning your FSS programs

SEMINAR NO: 101-037

PRICE: \$800 per person

MATERIALS: *Family Self-Sufficiency Case Management Course Book*, Strength Deployment Inventory, FSS Case Management Practicum Quiz, NMA pen, pencil, calculator, and bag

METHOD: A group-live seminar featuring PowerPoint, case studies, group discussion, seminar materials (workbook, course book or master book), brainstorming, and Q & A

LENGTH: Three days

AUDIENCE: FSS coordinators, FSS managers, and case managers

Seminar Catalog

EXAM: A certification exam is available online for \$150
CREDITS: **CPE** units w/ exam = 26 **CEU** units w/ exam = 2.2
Prerequisites: Basic knowledge of the FSS program

Seminar Catalog

Standard and Custom Onsite Information

Bring NMA to Your Workplace

Join the industry's most innovative housing authorities and companies in receiving customized training from Nan McKay & Associates (NMA). On-site education is the quickest, most reliable way to infuse your agency with concise, up-to-date information on industry trends, regulations, and best practices.

The results are better problem solving, skills that are more advanced, and revitalized productivity. Employees also express greater job satisfaction by gaining valuable knowledge while earning continuing education units (CEUs).

Benefits of On-Site Custom Training

IACET & NASBA APPROVED

Coursework reflects the high learning standards of the International Association for Continuing Education and Training and allows NMA to offer CEUs to our clients. Nan McKay & Associates, Inc. is also registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors

FLEXIBLE & CONVENIENT

Courses are delivered to your employees, at your location, on your schedule. Our goal is to make on-site training easy for you. By listening to your needs and relying on our attentive staff, we can respond to you quickly and easily.

CUSTOMIZED CONTENT

Each custom on-site seminar is designed to match the size of your staff, the programs your housing authority implements, and your learning needs.

COST-EFFECTIVE

On-site training is competitively priced to fit your budget, eliminates travel time, and can directly affect the productivity of your organization. Working together, we will help you reduce your costs by recruiting students from nearby agencies.

TOP INSTRUCTORS

Our trainers are industry experts who bring real-world knowledge and experience to each training session.

Seminar Catalog

APPLICABLE KNOWLEDGE

Our goal is not just to teach you HUD regulations and guidance, but also to impart applicable knowledge that is practical, functional, and relevant to your everyday housing practices. We'll teach the knowledge necessary to increase your skills and abilities immediately.

STANDARD ON-SITE AT LEAST 10 - 15 STUDENTS:

For our standard on-site seminars, simply choose from any of our standard regional seminar topics to be taught at your agency.

OPEN ON-SITE - LESS THAN 10 STUDENTS:

Working with our subject matter experts, you will create a custom agenda to meet the needs of your staff. As with our custom on-site training, we'll help to stretch your training budget further, if desired, by assisting your agency in marketing and promoting your on-site training session to other local agencies. This will allow you to further reduce your per person costs.

Seminar Catalog

IACET & NASBA

Build your credentials with seminars and certification exams that include CPEs and CEUs.

IACET

Nan McKay & Associates, Inc. has been approved as an Authorized Provider by the International Association for Continuing Education and Training (IACET), 8405 Greensboro Drive, Suite 800, McLean, VA 22102.

NASBA

Nan McKay & Associates, Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North Suite 700, Nashville, TN, 37219-2417. Web site: www.nasba.org. Contact NMA for CEU and CPE policies.

Certification Exams

NMA offers in seminar and / or online certification exams for the following seminars:

- Advanced Inspection
- Capital Improvement Fund
- Fair Housing & Reasonable Accommodation
- Family Self-Sufficiency
- HCV & Public Housing Rent Calculation
- HCV Eligibility
- HCV Executive Management
- HCV Financial Management & Reporting
- HCV Housing Quality Standards
- HCV Occupancy
- HCV Regulatory Management
- HCV Rent Calculation
- HCV Specialist
- Procurement & Contract Management

Seminar Catalog

- Project Based Accounting for PHAs
- Project-Based Maintenance Management
- PBM Essentials for the Property Manager
- PH Asset Management for Executives
- Public Housing Eligibility
- Public Housing Management
- Public Housing Occupancy
- Public Housing Rent Calculation
- Public Housing Specialist
- Self-Sufficiency Case Management
- Supervisory Management
- Uniform Physical Condition Standards
- UPCS Fundamentals

Master Books & Revisions

Many of our seminars include Master Books. Our books are packed with important information you need and are the perfect desktop reference. *Purchase a seminar that includes a master book and receive 10% off the revision service when you order together!*