

AGENDA
PUBLIC HOUSING EXECUTIVE MANAGEMENT

DAY ONE

- 8:00** **Registration**
- 8:30** **Welcome and Introductions**
- 8:45** **Organizational Overview**
- Overview of Programs – Moving to Work (MTW)
 - Legal Framework of Public Housing
 - The Executive Director, the Board, and Working Well with the Board
 - HUD’s Asset Management Model
 - Organizational Management – Assessing Current Organizational Operations, Culture, and Effectiveness
 - Sample Organizational Effectiveness Tool
- The Director**
- The Director’s Role
 - Competencies of the Director and How to Develop Them
 - Director Functions, Competencies Required, and Activities
- 10:15** **Break**
- 10:30** **The Director (continued)**
- Managing Yourself and Others – DISC®
 - Job Descriptions – Executive Director and Portfolio Director
 - Supervisory Management – Top Ten Supervisor Tasks and What Your Employees Need to Know
 - Developing Leadership Skills
 - Managing Change
- 12:00** **Lunch (on your own)**

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- 1:00 Policies and Policy Development**
- Required PHA Policies
 - The Consolidated Plan
 - The PHA Plan and Process
 - Capital Fund 5-Year Plan and Process
 - Other Required Policies
 - Policies Required in Public Housing
 - Policy Checklist
- Private Sector Principles in Public Housing Management**
- PHA vs. Private Property Management
 - Roles of the Asset Manager and Property Manager
 - Functions and Competencies of Property Managers
 - Job Description
- 2:30 Break**
- 2:45 Private Sector Principles in Public Housing (continued)**
- Asset Management and Project Management
 - Sample Portfolio and Property Forms
 - Risk Management and Insurance
 - Marketing Techniques
 - Filling Units and Collecting Rent
- Finance for the Public Housing Director**
- The Operating Subsidy Formula
 - Project-Based Subsidy, Budgeting, and Accounting
- 5:00 End of Day One**

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DAY TWO

- 8:00** **Finance for the Public Housing Director** (continued)
- PHA Case Study and the Project's Budget
 - Understanding Budget Requirements and Terms
 - PUM Calculation and Learning Activities
 - The Budget Process
- 10:15** **Break**
- 10:30** **Finance for the Public Housing Director** (continued)
- Paying for Services – Frontline, Shared Resources, Frontline Allocated, and Fee-for-Service
 - Fees Paid by the Project to the COCC – Property Management Fees, Bookkeeping Fees, Asset Management Fees, and Capital Fund Program Management Fees
- 12:00** **Lunch** (on your own)
- 1:00** **Finance for the Public Housing Director** (continued)
- Year-End Financial Reporting Overview
 - Capital Fund Program and Budgeting
 - Use of Capital Funds and Operating Funds
 - The Income Statement and Monitoring Budget to Actual
 - The Balance Sheet and Fungibility
 - Basics of Understanding the Audit Report
- 2:30** **Break**

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- 2:45 Entrepreneurial Strategies**
- Setting Up a Nonprofit Entity
 - Mixed Income Housing and Mixed Use Development
 - Leveraging the Capital Fund (CFFP)
 - Mixed-Finance Development
 - HOME
 - CDBG Funds
 - Choice Neighborhoods Program
 - Bond Financing
 - Low Income Housing Tax Credit (LIHTC)
 - Regionalization
- 5:00 End of Day Two**

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DAY THREE

- 8:00 Entrepreneurial Strategies (continued)**
- Overview of the Real Estate Development Process
 - Starting a New Business Venture
- Rental Assistance Demonstration Program (RAD)**
- Overview
 - PBV vs. PBRA and Required Policies and Forms
 - The RAD Process
 - Programs Commonly in RAD Developments
 - Special Provisions for PHA-Owned Properties
- Asset Repositioning and Portfolio Planning**
- Short-Term and Long-Term Assessment of Each Project
 - Physical Needs Assessment (PNA) and Market Data
 - Funding Sources
 - Portfolio Planning and Asset Repositioning Strategies
- 10:15 Break**
- 10:30 Managing Nondiscrimination**
- The PHA's Fair Housing Requirements
 - The Laws, Executive Orders, HUD Rules, and Supreme Court Decisions
 - Discriminatory Effects and Disparate Treatment
- 12:00 Lunch (on your own)**
- 1:00 Managing Nondiscrimination (continued)**
- Reasonable Accommodation
 - Definition of "Disabled"
 - The Reasonable Accommodation Process
 - Verification – What the PHA Can and Cannot Ask
 - Reasonableness of Request
 - Reasonable Accommodation Functions
 - Service Animals and Assistance Animals
 - Overview of Physical Accessibility
- 2:30 Break**

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- 2:45** **Managing Nondiscrimination (continued))**
- Limited English Proficient (LEP) Persons
 - Violence Against Women Act (VAWA)
 - The 504 Coordinator – Monitoring
 - Sample Forms
- Procurement**
- Regulations and Guidance
 - Basics of Procurement – Small Purchases, Sealed Bidding, Competitive Proposals, Noncompetitive Proposals
 - Types of Contracts and Contract Monitoring
 - Section 3 of the HUD Act of 1968
- PHAS**
- 3-2-1 Schedule under the Interim Rule
 - PHAS Indicators, Subindicators, and Scoring
 - Physical Condition
 - Financial Condition
 - Management Operations
 - Capital Fund
- 5:00** **End of Day Three**

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DAY FOUR

- 8:00** **Managing the Program Elements**
- Directing the Management and Supervision of Staff
 - Overseeing the Management of Key Program Elements
 - Smoke-Free Public Housing
 - Mandatory vs. Discretionary Terminations
 - Hearings
 - Property Management
 - EIV
 - Records and Confidentiality
 - Management Controls
 - Tracking Performance (Quality Control)
 - Addressing Staff Capacity and Poor Performance
 - Sample Reports
- 10:15** **Break**
- 10:30** **Program Integrity and Ethics**
- Internal Controls
 - Risk Assessment, Control Activities, Monitoring, Communication
 - Behavior and Conduct of PHA Personnel, Preventing Unintentional Errors
 - Investigation of Possible Violations
 - Ethics
 - Strong Ethics Policies and Practices
 - Principles of Personal Ethics
 - The Ethical Challenges
 - Sample Employee Standards of Conduct
- 12:00** **Lunch** (on your own)

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- 1:00 Strategic Planning**
- Planning the Process
 - Steps in the Strategic Planning Process
 - SWOT Analysis How-To
 - The Action Plan
 - Implementation, Dissemination, and Training
 - Emerging Strategic Issues
 - Succession Planning
 - The Multigenerational Workplace
- 2:15 Break**
- 2:30 Review and Study**
- Certificates of Participation Awarded**
- 3:00 Public Housing Executive Management Certification Exam**
- 5:00 End of Exam and Seminar**