

**“The Training Conference dedicated to  
improving your Agency Operations”**

**February 17<sup>th</sup> & 18<sup>th</sup>, 2010**

**The Golden Nugget Hotel – Las Vegas, NV**

**REGISTER  
NOW!**

**14 WORKSHOPS & Mini-Workshops**  
Attend One or More For the Same Price

**Workshop 1: Commissioners Training Board Governance** (2 sessions)

**Who should attend:** Board Chairpersons, Vice-Chairpersons, Commissioners

Based on a policy governance model specifically designed for Public Housing Agencies, commissioners will learn their roles and responsibilities and how to conduct effective board meetings. This workshop is comprised of two sessions:

- Level 1 - The 9 Principles of Policy Governance
- Level 2 - The Chairperson's and Secretary's Roles and Effective Board Meetings
- Public Information Act & Open Meetings Act Training and Certification for *Texas Commissioners*

**Workshop 2: Capital Fund**

(4 sessions)



**Who should attend:** Executive Directors, Modernization staff, Asset Managers, Maintenance staff

Back by popular demand, this one day workshop will provide guidance on new American Recovery and Reinvestment Act (ARRA) requirements, planning, recordkeeping, reporting, monitoring, obligations, expenditures, and replacement housing factor eligibility.

The Capital Fund Workshop sessions will include:

- The Nuts and Bolts of Managing a Capital Funds Program
- Program Regulations, Requirements and Eligible Activities

- Program Administration: Procurement, Funds Requests and Closeouts
- Development and Financing
- ARRA Requirements and Reporting

**Mini - Workshop 3: New PHAS**

(1 session)

**Who should attend:** Asset Managers, Property Managers, Maintenance staff, Accounting staff, Resident Services staff

Plan now and prepare an easily followed paper trail for the new project-based Management Operations reviews. Requirements and scoring for each of the new indicators, sub-indicators and components will be reviewed. Participants will gain knowledge needed for achieving high performer scores at each project, as well as, an overall high score for the PHA. Planning, tracking and sample report forms will be provided to document activities. Topics to be covered include:

- PHAS on the AMP level – Emphasis on individual property performance
- Review of the new FASS (financial) and MASS (management) sub-indicators and criteria for achieving high scores for each component of the sub-indicator
- Policies and Procedures needed to achieve and maintain high performer status
- Tools for tracking and documenting each Indicator, sub-indicator and component



**Workshop 4: Human Resources** (5 sessions)

**Who should attend:** Executive Directors, Personnel Directors/Managers, Human Resource and supervisory staff

Participants in this 4- part workshop will learn how to interview and select the right people; determine what file documentation is required by law and what will protect you if challenged; and procedures for effective disciplinary actions. Topics include:

- Interviewing and Hiring the Right People
- File Requirements – The *Musts* and *Must Nots* of HR File Maintenance
- Progressive Discipline and Documentation
- Need and Benefits of a Retirement Plan

**Workshop 5: Maintenance Technical Skills** (7 sessions)



**Who should attend:** Maintenance Directors, Maintenance staff

These 2 days of hands-on workshops, designed for both new and experienced (non-certified and non-licensed) maintenance personnel, will cover the following topics:

- Air Conditioning Systems: (1 day) This workshop utilizes a computer generated air conditioning system. Students will analyze, diagnose and repair typical problems of A/C system operations. Material handouts will include a very detailed troubleshooting chart.
- Three-Way Switch Circuits: (1/2 day) Working from a live circuit board, the trainer will demonstrate a foolproof, step-by-step technique to identify and resolve related problems.

- Refrigerator Controls: (1/2 Day) Participants are taught simplified procedures to troubleshoot and test the entire controls system of basic model refrigerators. The workshop training will be performed using testing equipment on an actual refrigerator.

### **Workshop 6: Income and Rent Determination** (2 sessions)

**Who should attend:** Executive Directors, Property Managers, PH and HCVP Case Managers

Applicable to both Public Housing and the Housing Choice Voucher Program, this workshop will highlight new requirements related to the EIV System 9.0 Updates, the newest Refinement of Income and Rent Final Rule, and on-going challenges in Rent Determinations. Procedures for implementing HUD's newest Housing Choice Voucher Program guidance on changes in utility allowances/payment standards and terminations due to insufficient funding will be presented.

Workshop sessions include:

- Making the EIV System Work for You
- Processing, Reporting and Calculating Rents When a Minimum Rent Hardship Exemption is Requested
- Processing Imputed Welfare Income (including reporting requirements when there is new income to the household)
- Overcoming Challenges in Processing Earned Income Disallowance

### **Workshop 7: Property Based Management** (2 sessions)

**Who should attend:** Executive Directors, Asset Managers, Property Managers, Accounting Staff

Whether operating under the Asset Management or traditional public housing management model, staff will learn skills that will enhance their housing knowledge and job performance. Training is a must for PHA employees who work in the property manager field. Sessions include:

- Property-based Budget Preparation and Monitoring
- Waiting List Management: Site Based vs. Community-Wide waiting list options and Fair Housing considerations
- How to develop a Smoke Free policy for Public Housing

### **Mini-Workshop 8: Going Green** (1 session)

**Who should attend:** Commissioners, Executive Staff, Property Managers, Maintenance Directors, Resident Service staff

This workshop will focus on the identification, development and implementation of prioritized Energy Conservation Measures that will assist PHAs in their efforts of "Going Green". The workshop will present the latest industry knowledge for energy conservation efforts covering the following topics:

- Building Envelope – Identifying physical areas of improvement for PHA properties that present opportunities for reduced Utility Consumption and increased Energy Efficiency.
- Cost-Effective Measures – Offering insight on the most cost effective measures for PHAs to budget and prioritize Energy Conservation Measures for short term and long term goals.
- Resident Education/Participation – Learn proven methods and programs that have been implemented and successfully used to encourage Resident participation in PHA energy conservation activities.

### **Mini-Workshop 9: Grievance Hearings, Informal Hearings and Informal Reviews** (1 session)

**Who should attend:** Executive Directors, PH and HCVP staff, Commissioners

Workshop topics will cover the critical regulatory requirements set forth by HUD for preparing, conducting and documenting hearings and reviews. Workshop material will focus on the increased importance of Fair Housing related issues and specific PHA program topics will include:

- Grievance Hearings – When they are and are not required by the PHA (PH Only)
- Informal Reviews/Hearings – Who can request them and when they are and are not required (HCV Only)
- Procedures for conducting hearings and reviews

### **Workshop 10: Commissioners and Executives Training** (4 sessions)

Workshop sessions will introduce PHA Commissioners and Executives to the new administration's initiatives for Public Housing and the Housing Choice Voucher Programs, Procurement Basics focusing on new Federal requirements implemented from Stimulus Monies, Strategic Planning for PHA missions and visions to better serve their communities and Fair Housing

related issues relative to Commissioners responsibilities.

### **Mini-Workshop 11: Information Technology** (1 session)

**Who should attend:** Executive Directors, PH and HCVP Directors, PH and HCV staff

This workshop will explore shortcuts for navigating HUD's new websites. Participants will be provided with vital bookmarks for resources to validate agency decisions and actions. Tips will be provided for using the new revised 2010 Housing Resource Library DVD with over 150,000 pages of searchable data.

Participants will also learn how to maximize their PHA's website with tips and best practices that can lessen the administrative burden on staff and make your website work for you!

### **Mini-Workshop 12: Resident Services** (1 session)

**Who should attend:** Asset Managers, Property Managers, Resident Service Coordinators

This workshop will cover the specifics of the new PHAS indicator requirements relative to Residents. Learn what activities qualify as Resident Participation in Property Administration, how to develop Economic Self Sufficiency activities and tips for tracking and documentation of Community Service. Training will also cover the enhanced and proposed Section 3 initiatives. Learn what opportunities are available under Section 3 for Residents and who qualifies for employment and training.

### **Workshop 13: Section 8 Project Based Voucher Development** (2 sessions)

**Who should attend:** Executive Directors, HCVP Directors, Asset Managers, financial staff

This workshop will introduce HCV programs to Project Based property development. With step by step procedures participants will learn:

- When and why to project-base
- Tiered HAP Contract execution
- SEMAP review of project-based vouchers and filing strategies
- Location of long-term affordable units using industry analysis
- Building partnerships in the community with cities and affordable housing developers



## Workshop 14: Developing A Great Internal Compliance Program (2 sessions)

**Who should attend:** Executive Directors, Asset and Property Managers, HCVP Directors, Quality Assurance and/or Compliance Directors

Training topics will focus on the importance of developing or enhancing your agency's Internal Compliance Program. The step-by-step processes presented will enable your PHA to recognize and implement sound quality control procedures. Topics will include:

- Top down approach to detailing your Internal Compliance Program
- Effective development and use of policies and procedures
- Establishing objectives
- Risk assessment
- Internal control activities
- Ongoing and periodic monitoring
- Responses to PHA identified weaknesses

### Certification Challenge Tests

If you have taken training previously or if you feel that you have sufficient knowledge to pass a certification test without the training, you may take a certification test at the conclusion of the conference for \$149. Those passing will receive their certificate mounted on a marbled plaque. Testing will be available for: HQS Inspections, UPCS/Annual Inspections, Public Housing Rent Calculations, HCVP Rent Calculations, HCVP Occupancy, Public Housing Occupancy, Commissioner -Level I, Commissioner-Level II, and Supervisory Maintenance.

*"Your Conference was Fantastic! I've been telling everyone that has ears about the quality of the workshop I attended. I'm very eager to attend next year's event and will be bringing a few others as well."* K.S. – Madison HA, WI

*"I really enjoyed the Conference and thought all the workshops were great...I enjoyed the fellowship with the other Housing Authorities and sharing of ideas."* G.S. – North Charleston HA, SC

*"This was my first conference and I had a great time. I found the conference to be very worthwhile and informative. I would definitely recommend to others to attend."* Y.J. – Chesapeake Redevelopment HA, VA

### Nelson Rodriguez, President and CEO

Mr. Rodriguez has 39 years experience as a manager, administrator, writer, and trainer in the areas of Public Housing, Section 8, Capital Program, agency planning and much more. He and his firm have provided consulting services to over 3,780 agencies.



# Conference Trainers/Presenters

### Vicki Brower, Director of Training

Ms. Brower has more than 20 years experience as an Executive Director. One of the top housing curriculum authors and trainers in the country, she was also Operations Manager of HUD's Public and Indian Housing Information Resource Center (IRC) where she conducted extensive research in regulations, statutes and HUD guidance.



### Valencia Barber, Senior Director Nelrod D.C. Office

Ms. Barber has over 12 years of Public Housing experience in Resident Initiatives, Procurement and as a Grants Management trainer/writer. As Project Manager for HUD's Information Resource Center (IRC) for Public and Indian Housing (PIH), she worked closely with HUD Headquarters and Field Offices. She monitors HUD Washington changes to regulations and initiatives for the Consortium.



### Eileen Rogers, Trainer

Eileen Rogers retired from HUD with more than 35 years of service. Ms. Rogers was Director of the Fort Worth Office of Public Housing and managed two large Public Housing Offices: Los Angeles and San Francisco



### Roman Palomares, Trainer

Mr. Palomares retired from HUD with more than 28 years experience in directing, administering, and assessing Public and Assisted Housing Programs for over 300 local communities and has trained numerous Board of Commissioners concerning housing regulations, policies, and procedures.



### Joshua Rodriguez, Managing Partner JARCO Ventures

Mr. Rodriguez has developed automated systems geared towards efficiency and compliance and maintains the integrity of the existing systems for private sector companies and housing agencies. He utilizes a variety of technical and programming skills, including database design and web development.



### Mark Vogeler, Vice-President of Operations

Mr. Vogeler offers over 28 years experience directing successful Section 8 housing operations, including providing guidance and technical assistance to many of the nation's largest Section 8 Housing Choice Voucher Programs



### Jeremy Spence, Trainer

Mr. Spence has provided training and technical assistance to numerous agencies on rent determinations, compliance and quality control issues. In addition he served as a call center supervisor for HUD's Public and Indian Housing Information and Resource Center.



**Other support trainers include: Georgia Towner, Cheryl Lord.**

### William (Bill) Thorson, Capital Fund Trainer

Mr. Thorson retired from the U.S. Department of Housing and Urban Development at HUD Headquarters with over 35 years of service and held many key management positions including Director of the Office of Capital Improvements where he managed the Capital Fund and Capital Fund Financing (CFFP) programs. He has trained extensively on the public housing Capital Fund, CFFP, procurement, and energy performance contracting.



### James Rodriguez, Vice – President of Fox Energy Specialists

Mr. Rodriguez is currently overseeing a "green" project for the U.S. Army which involves the air-sealing of facilities of two Army Reserve Centers. In addition to managing numerous energy improvement contracts, he is project director of a weatherization quality assurance contract with the City of Houston's low-income residential green initiative. He is a certified Green Building Accredited Verifier.



### Jim Waterman, Maintenance Technical Trainer

Mr. Waterman has over 20 years experience in providing maintenance technical training for the housing industry. He has an extensive background in technology and education and has taught numerous maintenance related curricula at a large university.



### Kiana Faucette, Trainer

Ms. Faucette is a program analyst at Nelrod's Washington, DC office and has extensive experience in administration, personnel, housing operations, research analysis and data management. Recently, she conducted Fair Housing and 504 Compliance Training for the Fulton County, GA and Millville, NJ housing agencies.



### Judson Brown, Trainer

Mr. Brown has experience in managing the HCV program and has successfully applied project-based units at several developments. He is a well-known trainer in project based vouchers and affordable housing development in California.



### Priscilla Higgins, Trainer

Ms. Higgins applies more than 30 years experience in business management and human resources in administering the Accu-Wage Salary Division. She has provided human resource technical assistance to corporate and housing agencies nationwide.



### Janice Gibbons, Trainer

Ms. Gibbons has over 19 years of public housing experience as an Executive Director. She is knowledgeable concerning all aspects of public housing occupancy and is proficient in public housing accounting, capital fund and maintenance requirements. In addition to training development, Ms. Gibbons provides on-site support to public housing agencies.



**FREE** to all Conference Participants

Updated 2010 version PHA Resource Library on DVD (provides Federal and State guidance that housing agencies need to operate). New for this year: Expanded Multifamily housing resources!

# REGISTER NOW!!

on line at [www.nelrod.com](http://www.nelrod.com)  
or contact by phone 817-922-9000  
Jeremy Spence ext. 122 email: [spencej@nelrod.com](mailto:spencej@nelrod.com)  
or Brandon Mendoza ext. 138 email: [brandon@nelrod.com](mailto:brandon@nelrod.com)

## Registration Fees

includes all 14 Workshops, Workbooks, Handouts & Slide Presentations on Disk.



**Consortium Partners**  
\$529 - Each (up to 2)  
\$449 - Each (3 or more)

**Non-Partners**  
\$599 - Each (up to 2)  
\$549 - Each (3 or more)

The Golden Nugget Hotel: Special Conference Room Package, Wednesday and Thursday nights....\$75.00 single or double (plus tax) which includes 2 lunches with entertainers and 2 light continental breakfasts.

*(Participants not using the Nelrod Group Golden Nugget Hotel Package will be charged an additional daily fee)*

For Hotel Information & Accommodations please visit [www.nelrod.com](http://www.nelrod.com)  
or contact Jeremy Spence at 817.922.9000 x 122 or by email at [spencej@nelrod.com](mailto:spencej@nelrod.com)

## Conference Entertainment

**THE MENTALIST**  
Experience the Impossible!

**BLUZMEN**  
Soul, Rythm & Blues and Blues  
Incomparably Performed  
"Like catching lightning in a bottle"

**BLUZMEN**... a Tribute to The Blues Brothers