Topics, Schedule, and Events Subject to Change

2019 Conference Class Descriptions

= Eligible for Certificate of Completion

= Certification Exam Available

= Commissioner Class

Governance (Commissioners) Training

9 Principles of Policy Governance
(Wed. 1:15pm – 2:45pm)
Learn these 9 proven principles that are utilized by hundreds of Public Housing and Section 8 Agency Boards across the country. These principles will help you understand the best way to function within federal, state and local regulations. You will gain an understanding of policy formulation and how to make decisions based on policy criteria.

Robert's Rules of Order
(Wed. 3:00pm – 4:30pm)
Learn the roles of officers and board members, as well as, "how to" implement your responsibilities in the governance process. Other topics covered include: how to run a meeting, taking minutes, and setting agendas. Additionally, the instructor will provide training on Robert's Rules of Order. Learn the proper way to make motions, stop discussions, postpone matters, and much more.

Resolving Board Conflicts: Differences Between Healthy Discourse and Disruptive Behavior
(Thurs. 8:30am – 10:00am)
When a group of individuals come together, there is the possibility of conflict and disagreement. However, there are many healthy ways to resolve these conflicts. The instructor will present a six-step process that can be used to resolve conflicts of any nature. Participants will also learn conflict resolution skills, dealing with anger, and other disruptive behaviors.

Governance (Commissioners) Training

Understanding Your Agency's Budget
(Thurs. 10:15am – 11:45am)
Financials made easy! Learn the essentials about Agency budget reports. Learn how to identify where, and how your Agency spends its funds and resources. Gain an understanding of your Agency's operating costs. Learn the red flags in budget reports so you know when to request additional information from your Executive Director.

Effective Strategic Planning
(Thurs. 1:45pm – 3:00pm)
Having a vision and a plan for the future is vital for Agency success. In this class, participants will learn how to create a vision for their Agency's future and what needs to be evaluated for crafting a good 5-Year Plan. Topics include:

- How to clearly define the strategic planning process
- Explain how to create and execute a strategic plan
- Provide strategic planning tools
- Explain how the outcomes of strategic planning are incorporated into the PHA's Five-Year and Annual Plans
- Discuss principles of positive change

Rental Assistance Demonstration (RAD): What Commissioners Need to Know
(Thurs. 3:15pm – 4:45pm)
Is your agency considering the Rental Assistance Demonstration (RAD) Program? RAD allows agencies to convert Public Housing and Moderate Rehabilitation developments into Section 8 Project-Based Voucher or HUD Multifamily Project-Based Rental Assistance. However, many agencies are still unclear if RAD is a good fit for them. Attend this class and see if it is a good fit for your agency.

Agency Boards vs. Non-Profit Housing Boards: Similarities and Differences
(Fri. 8:30am – 10:00am)
Can agency commissioners serve on a non-profit housing board, as well as, their agency board? What are the differences between these two boards? How do commissioners avoid conflicts of interests? This class will deal with these questions and address: board appointment, governing authority, board service, procurement processes, funding sources, and more.

Assessing Your Agency
(Fri. 10:15am – 11:45am)
Agencies have reporting requirements each year they must submit to HUD indicating operations are compliant. For Public Housing, the program is called PHAS, or Public Housing Assessment System. In the Section 8 Housing Choice Voucher Program it is called SEMAP, or Section 8 Management Assessment Program. Attendees of this class will learn the basics of PHAS and SEMAP and what responsibilities commissioners have with these programs.

General Interest Training

(Commissioners, Executives, and Supervisors)

To RAD or Not To RAD? Assessing Your Agency's Interest
(Wed. 1:15pm – 2:45pm)
Making the decision to RADicalize your agency can be complicated, as sometimes the "devil is in the details". Learn effective processes other agencies used to make their decisions. Receive the critical questions your staff should ask themselves. Decide on what development role the Agency should play in the process.

Overview of the 8 Stage RAD Conversion Process
(Wed. 3:00pm – 4:30pm)
RAD is easier to understand once the chronological steps in the process are understood. An explanation of each of the 8 steps in the RAD conversion process will be reviewed, from Strategic Planning to actual Conversion.

Human Resource Essentials Part I: Progressive Discipline
(Thurs. 8:30am – 10:00am)
The main objective of this session is to teach you the steps in progressive discipline and help you use this disciplinary system consistently and fairly to manage employee behavior and performance. By the time the session is over, you should be able to: apply progressive discipline fairly and consistently, identify laws and policy requirements affecting discipline, conduct effective disciplinary meetings, and document disciplinary action properly.

Human Resource Essentials Part II: Onboarding New Employees
(Thurs. 10:15am – 11:45am)
Why invest in an onboarding process rather than just a one-day orientation? A continuous onboarding process not only ensures that new hires have the necessary paperwork filled out and start the job on the right foot, but helps to socialize the new hire into the organization. A quality onboarding process helps to promote employee retention, which both provides cost savings, and contributes to greater continuity among the work team.

Human Resource Essentials Part III: Recordkeeping Requirements
(Thurs. 1:45pm – 3:00pm)
Which documents should be kept? How long do you keep each type document? What information should be recorded on the Destruction Log? Who can have access to Human Resource Documents? What has to be maintained in separate files from the employee's personnel file? Learn the answers to these questions and more from your instructor, a certified professional specializing in Public Housing Agency Human Resources.

HUD Update! Review Latest Issued Guidance and New Initiatives from HUD and Other Federal Programs
(Thurs. 3:15pm – 4:45pm)
RAD? HOTMA? Major changes to daily operations, as well as reporting requirements, are anticipated in 2019. The instructor will review the latest guidance pertaining to Public Housing and Section 8, and RAD programs. Additionally, updates on other HUD demonstration programs, and projected funding for these initiatives will be discussed.

General Interest Training

(Commissioners, Executives, and Supervisors)

Principles of Effective Leadership
(Fri. 8:30am – 10:00am)
Every Agency should have a Leadership Development Program to identify and nurture leaders at every level who can execute strategy and can motivate and foster learning in others. While each leader chooses their unique formula of success, there are keys to authentic leadership that can't be ignored. Attendees will gain insight on how good leaders impact Agency operations. Each attendee will receive a 6-step Leadership Competency Development Cycle worksheet to use at your Agency.

Agency Reporting Requirements: How, When, and Where
(Fri. 10:15am – 11:45 am)
The Calendar of Due Dates, accessed through HUD.gov, lists all PIH reporting requirements for Agencies. Links to forms and instructions for submission are also provided. This class will show you how to access this information and ensure you are reporting timely.

Section 8 Training

(HCV, PBV, PBRA)

Portability Part I: Initial PHA Actions ***(Wed. 1:15pm – 2:45pm)***
In this class the instructor will address the required actions the Initial PHA must take to properly port a Housing Choice Voucher. The process will address how to determine if the family is eligible to port all the way through determining if the Receiving PHA is going to bill or absorb.

Portability Part II: Receiving PHA Actions ***(Wed. 3:00pm – 4:30pm)***
Attendees of this session will gain an insight on processing the receipt of a portable voucher. Steps needed to resolve billing issues will be addressed. The instructor will also cover how to submit, and report portability actions required by the Receiving PHA.

Project-Based Vouchers: 4 Stages Towards Implementation ***(Thurs. 8:30am – 10:00am)***
Changes in regulations make it possible for agencies to convert Public Housing units into PBV units. However, the PBV process can be complicated, some agencies are receiving findings and monetary penalties during OIG audits and PIH reviews. New and experienced PBV staff will learn everything needed to coordinate the Project-Based Voucher process in four, easy-to-understand stages.

Project-Based Vouchers: RAD Conversion Occupancy Requirements ***(Thurs. 10:15am – 11:45am)***
Whether agencies are in the RAD planning stages or they have converted to RAD Project-Based Vouchers, staff need to know several occupancy requirements that are designed solely for RAD PBV conversions. This session will review the 15 most important requirements as well as best practice procedures to be in compliance. Topics include, but are not limited to: establishing the Waiting List, Tenant Rent Phase-in, Mobility, Resident Rights, and RAD Lease Requirements. A RAD Conversion Occupancy Compliance Checklist will be provided.

Section 8 Training

(HCV, PBV, PBRA)

Occupancy Basics Part I: Admissions Process

(Thurs. 1:45pm – 3:00pm)

Participants will learn the key requirements for Section 8 HCVP Admission Process and applicant/participant file folder management. Staff will gain insight on how to properly "pull" applicants off the waiting list and determine initial eligibility. Procedures for conserving files that contain the proper documentation from time of application, to admission, to the program, will also be covered. Emphasis is placed on procedures for consistent documentation, so that files are compliant with HUD and other audit requirements.

Occupancy Basics Part II: Lease-Up Process

(Thurs. 3:15pm – 4:45pm)

From Voucher Issuance to HAP Contract execution, this class will walk you through each step. The instructor will address issues with processing Requests for Tenancy Approvals (RFTA) as well.

Occupancy Basics Part III: Annual and Interim Reexaminations

(Fri. 8:30am – 10:00am)

Attendees of this class will learn the best practices and review appropriate timelines that case managers should use to quickly and correctly complete annual exams. One of the most performed tasks at the Agency is Annual/Interim Reexams. Having a good plan and set of procedures can make this task a lot easier.

Occupancy Basics Part IV: Terminations

(Fri. 10:15am – 11:45am)

Few people like to deal with complaints and grievances. Unfortunately, it is a fact of life in administering a Housing Choice Voucher Program. Attendees will learn the documentation needed before taking adverse actions against participants. Procedures are provided for processing terminations and informal hearings from start to finish. All attendees will receive a Housing Choice Voucher Hearing Officer Resource Guide.

Public Housing Training

PH Occupancy Basics Part I: Admissions Process

(Wed. 1:15pm – 2:45pm)

Participants will gain insight on how to properly select applicants off the waiting list and how to document the waiting list when applicants are "skipped". Guidance will be provided on how to determine which takes precedence – transfers or new admissions. Screening procedures for determining eligibility and suitability will also be covered. Organization and required contents of applicant/tenant files will be addressed along with "Best Practices" for successful and compliant file management.

Public Housing Training

PH Occupancy Basics Part II: Leasing and Continued Occupancy
(Wed. 3:00pm – 4:30pm)
This class will instruct participants on the procedures for applying HUD occupancy requirements and the options adopted by your agency for leasing and continued occupancy. Tips will also be shared for approaching situations that are challenging. Topics include:

- Lease-up Process
- Interviews and Verifications
- Community Service
- And, Much More

PH Occupancy Basics Part III: Annual and Interim Reexaminations
(Thurs. 8:30am – 10:00am)
One of the most performed tasks at the Agency is Annual/Interim Reexams. Having a good plan and set of procedures can make life a lot easier. Attendees of this class will learn the best practices and review appropriate timelines that case managers should use to quickly, and correctly complete annual exams.

PH Occupancy Basics Part IV: Procedures for Adverse Actions (Evictions, Charges, etc.)
(Thurs. 10:15am – 11:45am)
The grievance and eviction process can be easy if the proper documentation and procedures are followed consistently. Participants will learn step-by-step procedures for conducting and documenting Informal Hearings, Informal Settlements, and Grievance Hearings that encourage positive outcomes and are compliant with regulations.
Topics covered include:

- Processing Denials of Admission
- Processing Terminations
- Preparing Termination/Eviction Notices (Review of Most Common State Laws)
- Due Process Determinations
- Types of Hearings & Applicability
- Hearing Officer Checklist
- Implementing Policies and Procedures
- Grievance Hearing Process
- Effect of Decision on PHA

Adopting, Changing, and Managing Preferences
(Thurs. 1:45pm – 3:00pm)
Learn which documents must be updated when adopting, modifying, and applying preferences in Public Housing and Section 8 HCV programs. The instructor will also address procedures for updating waiting lists when preferences change and how to properly select applicants from the waiting lists.

Fees, Fines, and Deposits: Are Yours Compliant
(Thurs. 3:15pm – 4:45pm)
Over 15 types of fines, fees, and deposits will be reviewed. Participants will learn: what fees, fines and deposits can be billed and collected, what the PHA should consider in determining various fee structures, what charges cannot be assessed, what charges are limited by State laws, when payment of charges is due, and what information must be included in billings for charges other than rent.

Public Housing Training

Project-Based Rental Assistance (PBRA) Basics Part I: Tenant Selection Plan (TSP) and Other Required Policies *(Fri. 8:30am – 10:00am)*
If your agency is implementing a PBRA or Section 8 New Construction program, or is considering PBRA as part of a RAD program conversion, a TSP and the Earned Income Verification (EIV) Operations/Security Policy must be developed. This class will review what is needed to have compliant TSP and EIV policies. Participants will develop an understanding of what must be included in the PBRA/New Construction TSP, the EIV Operations/Security Policy, and the PBRA Pet Policy/Pet Rules.

Project-Based Rental Assistance (PBRA) Basics Part II: Documenting Compliance for Comprehensive Management and Occupancy Review (MOR)
(Fri. 10:15am – 11:45am)
Properties participating in the HUD Multifamily Office PBRA, RAD PBRA, and Section 8 New Construction programs are undergoing HUD Management and Occupancy Reviews. Contract Administrators must complete the 40-page Form HUD 9834 for each review. Agencies and property owners who do not have good documentation to prove compliance are receiving findings and financial penalties. This class will focus on how to establish a paper trail to document compliance, including a 25-point handout about how to prepare for the MOR review.

Income & Rent Determinations Training

(Certification Exam Course)

Income and Rent Calc Part I: Rent Determination Requirements and Options
(Wed. 1:15pm – 2:45pm)
This class will introduce the key principles of performing rent calculations, as well as the basic background requirements of the rent calculation process. Topics will include Fair Housing considerations all the way though what discretionary items need to be considered when performing calculations.

Income and Rent Calc Part II: Included and Excluded Income
(Wed. 3:00pm – 4:30pm)
With so many variations to income reporting sources, it's hard to know if certain incomes are to be included or excluded. Participants of this class will learn which income sources are to be excluded, and receive a helpful checklist for referencing income sources at the Agency.

Income and Rent Calc Part III: Identifying and Calculating Assets
(Thurs. 8:30am – 10:00am)
Assets are not as "routine" as other income sources and are commonly calculated incorrectly. Class attendees will learn, through case studies, how to properly identify and calculate these seldom seen types of income sources.

Income and Rent Calc Part IV: Calculating Deductions and Allowances
(Thurs. 10:15am – 11:45am)
Who is eligible for deductions, how to verify deductions, and sample calculations will be addressed. Learn what situations provide deductions for specific family members and/or the whole family. Case studies will be used to enhance the learning experience.

Income and Rent Calc Part V: Calculating Total Tenant Payment (TTP)
(Thurs. 1:45pm – 3:00pm)
One of the most critical calculation factors is the TTP. This class will review the regulatory formula for calculating TTP as well as how this figure relates to other calculation factors like Tenant Rent and Family Share. Case studies will be utilized to emphasize the key aspects of TTP calculation.

Income and Rent Calc Part VI: HUD's Verification and Documentation Hierarchy
(Thurs. 3:15pm – 4:45pm)
How you process verifications can vary greatly depending on the income source and frequency. Each scenario requires different actions and calculations. Attendees of this session will learn to identify and correctly perform such verifications as needed. Case Studies will be used to show compliant verification processes required by HUD.

Income and Rent Calc Part VII (Public Housing): Earned Income Disallowance (EID)
(Fri. 8:30am – 10:00am)
Are you aware of the recent changes to EID eligibility time frames? Family member eligibility for the disallowance and how to properly calculate EID will be addressed. Specific case studies will be used to highlight the learning experience.

Income and Rent Calc Part VII (Housing Choice Voucher): Payment Standards and Utility Allowances
(Fri. 8:30am – 10:00am)
If your jurisdiction services multiple zip codes or counties, you most likely have multiple Payment Standard and Utility Allowance schedules. Attendees of this class will learn how to correctly apply payment standards and utility allowances when performing rent calculations. Tips to ensure audit worthy calculations will be presented.

Income and Rent Calc Part VIII (Public Housing): Calculating Tenant Rent
(Fri. 10:15am – 11:45am)
Comprised of all the preceding work, this step is reliant on the quality of work done leading up to this part of the calculation process. A "Putting It All Together" case study will be presented to bring all the elements of the Public Housing rent calculation process together.

Income and Rent Calc Part VIII (Housing Choice Voucher): Calculating HAP and Tenant Rent to Owner
(Fri. 10:15am – 11:45am)
Utilizing a "Putting It All Together" case study, the instructor will bring all the elements of the Housing Choice Voucher rent calculation process together. Comprised of all the preceding work, this step is reliant on the quality of work performed leading up to this part of the calculation process.

Supervisory Maintenance Part I: The Elements of Maintenance
(Wed. 1:15pm – 2:45pm)
This session provides an overview of the principal elements of maintenance management necessary for a successful maintenance program. Applying each element for an effective maintenance program will be discussed.

Supervisory Maintenance Training
(Certification Exam Course)

Supervisory Maintenance Part II: Planning and Focusing Your Work
(Wed. 3:00pm – 4:30pm)
In this session, participants will learn how the principles for effective planning can positively impact their daily maintenance activities. Topics include: prioritizing and justifying capital improvement needs, developing work plans for routine and capital maintenance, and coordinating capital improvement plans with other maintenance activities. Focusing Your Work expands your analytical skills to effectively prioritize maintenance activities. These activities include focusing on work identification, work analysis, and work scheduling.

Supervisory Maintenance Part III: Work Standards
(Thurs. 8:30am – 10:00am)
The instructor will cover the principal standards established by HUD to ensure PHA performance and provide residents with decent housing. Methods for developing maintenance staff work standards that relate to overall good performance will be addressed. The focus of this session is how established standards affect analysis, prioritizing, planning, and scheduling maintenance responsibilities.

Supervisory Maintenance Part IV: In Search of Dollars and Using Your Money Wisely
(Thurs. 10:15am – 11:45am)
The basic purpose and policies for using the Capital Fund Program to enhance local maintenance management initiatives are outlined. Energy requirements and energy conservation cost savings are described, along with the need for implementation of an Integrated Pest Management Program (IPM). Participants will understand the purposes of the programs and the potential for their use as prescribed by policy.

Supervisory Maintenance Part V: Dealing With Your Customers (Residents, Staff, and Board)
(Thurs. 1:45pm – 3:00pm)
This session will show you the importance of your role in communication and customer service to the resident. Customer service and its key elements, along with the elements of communication, barriers to communication, and ways to overcome communication problems will be discussed.

Supervisory Maintenance Part VI: Understanding Who You Work With
(Thurs. 3:15pm – 4:45pm)
A maintenance supervisor is one of the few individuals who has direct and regular contact with the staff who maintain the units, the residents, and PHA management. You are a very important "link" in the communication loop at your PHA, and your feedback is valuable to your PHA's operational decisions. Attend this session and improve your understanding of who you work with.

Supervisory Maintenance Part VII: Safety On The Job
(Fri. 8:30am – 10:00am)
The purpose of this session is to make you aware of the need for a system of procedures that ensures maintenance personnel are protected from violence and unsafe working conditions while performing their maintenance duties.

Supervisory Maintenance Training

(Certification Exam Course)

Supervisory Maintenance Part VIII: The Paper Trail and Tracking Inventory
(Fri. 10:15am – 11:45am)
The "Paper Trail" describes the permanent records that are maintained to document expenses, materials, inventory, and unit histories associated with maintenance activities. Participants will learn the importance of keeping good records and the ways these records can be used to assist in operating a well-managed Agency. The basic principles of maintaining and tracking available inventory to develop a system which will adequately account for maintenance materials and appliances will be addressed. The instructor will also cover how to forecast the appropriate times for restocking inventory based upon in-stock quantities and warehousing space.

Fair Housing Training

(Certification Exam Course)

Fair Housing Part I: Introduction to Fair Housing
(Wed. 1:15pm – 2:45pm)
Special guest speaker, Assistant Secretary Anna Maria Farías Office of Fair Housing and Equal Opportunity (FHEO), will kick-off the training course by reviewing key historical perspectives on Fair Housing and providing insight to where FHEO and HUD are planning for the future.

Fair Housing Part II: Applicant Screening and Preferences
(Wed. 3:00pm – 4:30pm)
All pre-occupancy activities must be undertaken in a manner that does not discriminate on the basis of race, color, national origin, sex, religion, disability, or familial status. This session addresses nondiscrimination and equal opportunity requirements for accepting applications, screening, and applying preferences.

Fair Housing Part III: Section 3 – Requirements and Tips for Compliance
(Thurs. 8:30am – 10:00am)
Promoting and enforcing Section 3 requirements are among the top initiatives for HUD Secretary, Dr. Ben Carson. Participants in this session will learn the following: to identify Section 3 residents and Section 3 business concerns, what programs are covered under Section 3, the types of economic opportunities available, who receives priority under Section 3, and how the Agency can find residents and businesses eligible under Section 3.

Fair Housing Part IV: Record Keeping and Reporting
(Thurs. 10:15am – 11:45am)
HUD equals *"Have U Documented?"* When it comes to fair housing actions, there is no process that relies on documentation more. Learn how to easily set up an auditable paper trail of fair housing activities, from initial contact through termination of assistance.

Fair Housing Training

(Certification Exam Course)

Fair Housing Part V: Processing Reasonable Accommodation Requests
(Thurs. 1:45pm – 3:00pm)
While the guidelines for verification of Reasonable Accommodations are well established, Agencies still encounter issues with processing these requests. Attendees of this class will learn the procedures and appropriate timelines for specific actions needed to properly process Reasonable Accommodations.

Fair Housing Part VI: Physical Modifications Requirements and the Visitability Concept
(Thurs. 3:15pm – 4:45pm)
Although not a requirement, it is recommended that all design, construction, and alterations incorporate, whenever practical, the concept of visitability, in addition to the requirements under Section 504 and the Fair Housing Act. Learn the basics of this design concept, which for very little or no additional cost, enhances the ability of people with disabilities to interact with their neighbors, friends, and associates in the community.

Fair Housing Part VII: Pet Versus Assistance Animals (Processing Requests)
(Fri. 8:30am – 10:00am)
This class will provide you the knowledge and resources to make the correct determination each time. Each participant will receive an Assistance Animal Flow Chart electronically. This chart outlines each step in the process to ensure you compliantly determine if an animal is a household pet or a service animal.

Fair Housing Part VIII: Marketing and Outreach
(Fri. 10:15am – 11:45am)
When it comes to meeting Fair Housing requirements, is your Agency trying to reach out to those in your community, that are *least likely to apply*? If so, can you document how? This class will help you answer that very question.