



# New Executive Director Training

## Core Essentials for First-time Executive Directors

Tentative Agenda

October 6, 8, 13, 15, & 20, 2020 (Tuesdays & Thursdays)

9:00 a.m.– 4:00 p.m. (CST) Lunch: 12:00 noon – 1:00 p.m.

(Certification Exam starts Wednesday, Oct. 21 at 10:00 a.m.)

Part I: Tuesday, Oct. 6	Part II: Thursday, Oct. 8	Part III: Tuesday, Oct.13	Part IV: Thursday, Oct. 15	Part V: Tuesday, Oct. 20
<p><b>The Housing Agency</b></p> <ul style="list-style-type: none"> <li>• Applicable Laws and Regulations</li> <li>• HUD, PHA, and Local Governing Body</li> <li>• ACC and the Cooperation Agreement</li> <li>• Asset Management</li> <li>• Stakeholders</li> <li>• Organizational Structure</li> </ul> <p><b>The Board</b></p> <ul style="list-style-type: none"> <li>• Role of the Board</li> <li>• By-Laws</li> <li>• Board Meetings</li> <li>• Do’s and Don’ts</li> </ul> <p><b>Policies and Postings</b></p> <ul style="list-style-type: none"> <li>• Administrative</li> <li>• Operational</li> <li>• Legal Requirements</li> <li>• Reporting Requirements</li> <li>• PHA Plan Basics</li> </ul> <p><b>Personnel Policies</b></p> <ul style="list-style-type: none"> <li>• Personnel Policy</li> <li>• Job Descriptions</li> <li>• Training</li> <li>• Performance Appraisal</li> <li>• Salary and Benefits</li> <li>• Succession Planning</li> </ul>	<p><b>Agency Financials</b></p> <ul style="list-style-type: none"> <li>• Sources of Funding</li> <li>• Budgeting</li> <li>• Operating Statements</li> <li>• Balance Sheets</li> <li>• Financial Reports</li> <li>• Financial Policies</li> <li>• Financial Data Schedule (FDS)</li> <li>• Audits</li> </ul> <p><b>Capital Fund Program</b></p> <ul style="list-style-type: none"> <li>• How the CFP is Funded</li> <li>• Overview of Changes to CFP Rule</li> <li>• 2 CFR 200 Overview</li> <li>• Budgeting and Line Items</li> <li>• Eligible and Ineligible Expenses</li> <li>• Obligation and Expenditure Requirements</li> <li>• Section 3</li> <li>• Planning</li> <li>• Compliance</li> </ul>	<p><b>Procurement</b></p> <ul style="list-style-type: none"> <li>• Regulations and Resources</li> <li>• Contracting Officer Responsibilities</li> <li>• Ethics in Contracting</li> <li>• Local Policy and Procedures</li> <li>• Purchasing Thresholds</li> <li>• Micro-Purchases</li> <li>• Small Purchases</li> <li>• Competitive Purchases</li> <li>• Non-Competitive Purchases</li> <li>• Cooperative Purchasing</li> <li>• HUD Forms and Sample Forms</li> <li>• Contract Administration</li> <li>• Records Maintenance</li> </ul>	<p><b>Public Housing Program Occupancy Overview</b></p> <ul style="list-style-type: none"> <li>• Waiting List</li> <li>• Tenant Selection and Assignment</li> <li>• Occupancy Lifecycle</li> <li>• Basics of Rent Determinations</li> <li>• Rent and Other Charges</li> <li>• Resident Relations</li> </ul> <p><b>Maintenance</b></p> <ul style="list-style-type: none"> <li>• Maintenance Plan</li> <li>• Maintenance Supervision</li> <li>• Work Orders</li> <li>• Inspections</li> <li>• Inventory</li> </ul> <p><b>Fair Housing</b></p> <ul style="list-style-type: none"> <li>• Equal Opportunity</li> <li>• Discrimination</li> <li>• Reasonable Accommodations</li> <li>• Reasonable Modifications</li> <li>• LEP</li> <li>• VAWA Requirements</li> </ul> <p><b>PHAS</b></p> <ul style="list-style-type: none"> <li>• Sub-Indicators</li> <li>• Scoring</li> <li>• Tips to Succeed</li> </ul>	<p><b>Housing Choice Voucher Program</b></p> <ul style="list-style-type: none"> <li>• Program Overview</li> <li>• Eligibility</li> <li>• Funding and Financial Management</li> <li>• Issuing Vouchers and Conducting Briefings</li> <li>• Portability</li> <li>• HAP Contract</li> <li>• Payment Standards</li> <li>• Utility Allowances</li> <li>• Rent Reasonableness</li> <li>• VMS</li> <li>• HQS and UPCS-V</li> </ul> <p><b>SEMAP</b></p> <ul style="list-style-type: none"> <li>• Roles Under SEMAP</li> <li>• SEMAP Indicators</li> <li>• Documentation</li> <li>• Tips for Success</li> </ul>