

Training Offerings



Blueprint
HOUSING SOLUTIONS

2017 - 2018

Delivery Options

Blueprint Housing Solutions offers a variety of training programs that can be effectively delivered via live webinar or on-site training sessions - whichever method is more appropriate and convenient for the client.

Level of Difficulty

We train on a variety of topics that are well-suited for those new to the industry and looking to establish fundamental skills, as well as those looking for intermediate and advanced level compliance topics.

As new industry regulatory changes are introduced, curriculum is modified to incorporate updated content to keep you informed.

To help navigate our offerings, course listings are conveniently categorized as:

- Fundamental
- Intermediate
- Advanced

Pricing

Publicly offered webinar trainings are priced at **\$99/session**.

Pricing for private training engagements is negotiated on an individual basis, taking into consideration the following factors:

- * *Webinar vs. on-site delivery*
- * *Number of participants*
- * *Length and nature of training*
- * *Proximity to requested training date at the time of inquiry*
- * *Estimated travel expenses (if applicable)*

About the Trainer

Jenny DeSilva, COS, TaCCs, CMH

Jenny is a recognized compliance expert/speaker with extensive training experience. She provides consulting & customized compliance products for housing entities opting to outsource policy and procedure development. She is an active member of multiple HUD working groups to develop consistent regulatory oversight practices nationwide.



What's **NEW** at Blueprint

Our goal as trainers is to keep you informed on the latest changes in HUD compliance that directly impact your daily tasks. Please see below for our newest class offerings.

Understanding Your New VAWA Compliance Obligations (for HUD Properties) 1.5 hours

In November 2016, HUD published the **VAWA Final Rule**, implementing housing protections authorized in the Violence Against Women Reauthorization Act of 2013 (VAWA) in all of HUD's covered programs. Did you appropriately react to this new requirement by making the necessary adjustments to your written policies, forms, and recertification procedures?

While some regulatory requirements went into effect on December 16, 2016, owners were provided until June 14, 2017 to implement other requirements like Emergency Transfer Plans. Do you have a game plan to meet this deadline for implementation?

This interactive webinar will teach participants what protections and options must be provided to VAWA victims regarding their application or current housing assistance. Learn what adjustments must be made in the policies, interview, screening, recertification, and termination processes to comply with this new regulation.

Understanding the Impact of TRACS 2.0.3.A (for HUD Properties) 1.5 hours

HUD plans to release TRACS version 2.0.3.A on August 1, 2017 with an implementation deadline of October 31, 2017. Do you know how this update will affect site-level staff or centralized compliance staff using TRACS software? During this session, we will outline the most significant enhancements that will have a direct impact on your leasing operations to include:

- Expanded reporting categories
- New procedures for social security number reporting for some household members
- New subsidy suspension codes available for temporary tenant relocations
- New expanded reporting requirements for ongoing tenant subsidy repayment agreements

The way that you present is very easy to understand and the case studies are good examples. I learned a lot from you today!

-Noral, San Francisco

Awesome teacher. First time I've stayed engaged the entire class and retained information from start to finish. I'm amazed and excited!

-Charity, Arizona

Fundamental Offerings

Fundamentals of Tenant Interviews *1.5 hours*

This introductory session is geared toward new staff that interview tenants at move-in and during recertification. When done right, a thorough interview can save managers' time and frustration down the road. How organized is your interview process? Are your application and recertification questionnaires compliant with current regulations, or have these documents become stale? Are you asking all the right questions during the initial interview, or do you have to seek clarification from the tenant days later?

In this class, you will learn how to fine tune your interviewing skills and support your final income determinations during an efficient interview.

Fundamentals of Calculating Annual Income for 50059s *1.5 hours*

This class is geared towards new staff that interview tenants and perform income calculations for HUD 50059s. Learn what types of income do and don't count and how to correctly annualize these figures. We will explore when you can utilize EIV Income Reports as the sole source of income verification and when other methods of verification are required. This is a fundamental class for managers new to the affordable housing industry needing to establish this critical skill set for appropriate eligibility determination and rent calculations.

Fundamental Exercises With Asset Cash Value *1.5 hours*

Navigating through complex asset documentation is tricky and a less frequently exercised skill for many managers. This introductory -level class is designed for staff that interview tenants during the certification need to know what does and does not count as an asset. How often must assets be verified? What is the difference between cash value and market value? How do you estimate the value of real estate or insurance policies? We will use real-life examples to illustrate different types of assets and their correct valuation while teaching the participants techniques to ensure assets are being identified by the households.

Fundamentals of Expenses and Deductions *1.5 hours*

During this course, participants will learn about the different categories of deductions; which households are eligible for which deductions; and, of course, how to calculate them. We'll dive into the "gray area" a bit to cover inclusions and exclusions, and what types of verifications are required to support medical expenses. Learn when a wheelchair is a disability deduction and when it's a medical deduction. Get ready for interaction.....We will test your understanding of the regulations via real life scenarios.

Fundamental Asset Income Calculations *1.5 hours*

Asset income is calculated two ways: By computing the actual income earned and via imputed income calculations. Do you know the difference between the two and when to use which method? Are you comfortable imputing asset income using HUD's passbook rate? How do you calculate the income of assets when their value continuously fluctuates? At what point does an asset become an income source instead? Let's apply regulatory concepts related to assets to real-life examples to gauge your understanding of these important calculation methodologies.

EIV Fundamentals - Master Reports/ Existing Tenant Search (Multifamily System) *1.5 hours*

In this introductory EIV course, participants will be provided a concise overview of monthly and quarterly reports stored in the EIV Master File as well as the Existing Tenant Search. Learn when to print them, what they are telling us and where to store them. Example screenshots make this a superb class for visual learners! This fundamental class will give managers a clear summary of steps to ensure their tenant files and EIV Master File are organized and ready for assessment during an upcoming Management and Occupancy Review.

Intermediate Offerings

Verification Techniques that Promote Accuracy 1.5 hours

This intermediate level class is designed for leasing staff that regularly verify income, assets, and expenses. Are your verification forms effectively gathering the information you need? Are you asking the right questions? Have you incorporated the updated verification hierarchy into your recertifications? Are you continuing to see EIV income discrepancies, year after year, but don't know why?

In this energizing session, you will learn new, easy to use techniques to improve the accuracy of verifications to support accurate 50059 calculations.

The Mechanics of a HUD Management and Occupancy Review (MOR) 1.5 hours

This intermediate level class focuses on the MOR process and is perfect for new managers who have never undergone an MOR, as well as seasoned managers wanting a summary of how this process has changed.

What will the reviewer ask to review? How is my score determined? How often will these MORs occur?

We will cover each of the four stages of the MOR, new elements of the HUD Form 9834, the scoring methodology and HUD's risk-based approach to scheduling.

Think you don't have time for or need training on MORs? Can you really afford to say that?

So friendly, welcoming, clear, and helpful, especially for a beginner facing their first MOR!

-Stephanie, California

Everyday Income Calculation Scenarios 1.5 hours

This intermediate level class will present new calculation challenges to those that have mastered the fundamentals of annual income calculations. We will explore more complex student income, fluctuating income and self-employment scenarios and address when an asset converts to an income source. How does that impact the 50059? Finally, we will tackle those frustrating responses on verification forms that don't give critical information necessary to facilitate calculations. This class is a must have for managers looking to build upon their basic understanding to be successful in an imperfect world.

Wonderful program! Interesting, engaging, and I learned a lot!

-Becky, Arizona

Everyday Expense and Deduction Scenarios 1.5 hours

This intermediate class will focus on more complex scenarios that test your understanding of the regulations guiding expenses and their resulting deductions on 50059s. How do you accurately calculate medical expenses from a shoe box full of receipts? Where do you draw the line on "eligible medical expenses"? How accurately do you project child care expenses for school age kids? This session is filled with interview scenarios that keep you engaged and provide techniques to ensure your calculations are supported by documentation in the tenant file.

Resolution Secrets for EIV Income Discrepancies (Multifamily System) 1.5 hours

To accurately resolve discrepancies, you must be able to interpret the EIV Income Detail Report and the EIV Income Discrepancy Report. This session will teach participants what types of income EIV does and does not recognize. Next, we will explore the fundamentals of income discrepancies to uncover what triggers a discrepancy and how did EIV calculate the discrepancy amount? Why is the Period of Income (POI) so historical? How do I assess if the discrepancy is valid or not?

By the end of this interactive class, you will have answers to these questions and will be able to confidently dissect and resolve income discrepancies with ease.

Advanced Offerings

Creating and Reporting Repayment Agreements 1.5 hours

This advanced class is designed for compliance staff that handle recertifications and TRACS software. The group will explore common scenarios that prompt tenant repayment agreements. The instructor will test participant understanding of how the overpayment occurred and which lease obligation(s) the tenant did not meet, while sharing effective tips to minimize repayments in the future. The group will then practice calculating the balance of overpaid subsidy owed to HUD and determine when these transactions will appear on the voucher.

Next, using a realistic case study, the instructor will show participants how to correctly report various types of repayment transactions on the new repayment agreement schedule of the monthly voucher and how to proceed when terms of the agreement are not upheld by the tenant.

***Note: This class has been updated to incorporate new TRACS 2.0.3.A elements affecting repayment agreements.*

EIV Income Discrepancy Curve Balls 1.5 hours

Are you spinning your wheels? Do you struggle with documenting the file when a discrepancy is not valid? During this interactive session, participants will dive into case studies and learn how to document resolution, even when there are multiple income sources involved. Learn to recognize the EIV System's limitations and anomalies. Knowledge is power.

Compliance Challenge Course 1.5 hours

This is an advanced level course designed for compliance staff and seasoned managers. This session will test how much you really understand how HUD's regulatory changes affect your recertification process. How did you adapt to Change 4? Do you understand the new mid-month certifications in TRACS 202D? In this session, you will examine real world recertification scenarios that will incorporate various elements of new information to be gathered and recorded in order to maintain leasing compliance.

Section 8 Renewal Policy Renewal Options Training 2 hours

The advanced session will cover the renewal options outlined in HUD's Section 8 Renewal Policy. The training will discuss, in depth, the features of each option, the pros and cons of each, the eligibility requirements and what documentation is required. Discussion will also include the ideas of housing preservation and maximizing rent potential in the context of choosing the best option for your property. The instructor will cover recent updates the Section 8 Renewal Policy and the subsequent FAQs to include, updates to Rent Comparability Studies (RCS), budget-based rent increases, and Chapter 15 Preservation transactions.

Updating Affirmative Fair Housing Marketing Plans on a Budget 1.5 hours

This advanced, interactive session is designed for housing professionals needing to update their Affirmative Fair Housing Marketing Plan (AFHMP). AFHMPs must be reviewed and updated, if necessary, every five years. The AFHMP Form 935.2A now requires owners to gather and report demographic information from their existing tenant population, their waiting list and their surrounding community via census data. However, the census resources online are intimidating and technical to navigate. We will demonstrate the process by completing the online census research for a "sample property" and provide tips on the best ways to ensure your revised plan is a complete submission. Finally, learn inexpensive, yet effective, advertising and marketing techniques to attract applicants to your property without blowing your advertising budget.

Stress Free MORs - Maximizing Optimal Results 2 hours

The 2016 reinstatement of MORs for most Project-Based Section 8 contracts has many anxious about their leasing and occupancy compliance. In this advanced class, we will highlight specific new elements of your leasing and occupancy procedures that will be scrutinized during your MOR and help you develop your "To Do" list to avoid findings. Leave with a renewed sense of confidence that you *can* earn the rating you seek!

2017 Webinar Schedule

Visit www.blueprinhousing.org to learn more and register.

Introductory:

WEBINAR	DATES/TIMES	
Fundamentals of Tenant Interviews	5/15/17, 11:00am (CST)	8/07/17, 11:00am (CST)
Fundamental Exercises With Asset Cash Value	5/15/17, 2:00pm (CST)	8/07/17, 2:00pm (CST)
Fundamental Asset Income Calculations	5/16/17, 11:00am (CST)	8/08/17, 11:00am (CST)
Fundamental of Calculating Annual Income from 50059s	5/16/17, 2:00pm (CST)	8/08/17, 2:00pm (CST)
Fundamentals of Expenses and Deductions	5/17/17, 11:00am (CST)	8/09/17, 11:00am (CST)
EIV Fundamentals- Master Reports/Existing Tenant Search (HUD Multifamily System)	5/17/17, 2:00pm (CST) 7/10/17, 2:00pm (CST)	8/09/17, 2:00pm (CST) 10/16/17, 11:00am (CST)

Intermediate:

WEBINAR	DATES/TIMES	
Verification Techniques that Promote Accuracy	5/18/17, 11:00am (CST)	8/10/17, 11:00am (CST)
Everyday Income Calculation Scenarios	5/18/17, 2:00pm (CST)	8/10/17, 2:00pm (CST)
Everyday Expense and Deduction Scenarios	5/19/17, 11:00am (CST)	8/11/17, 11:00am (CST)
The Mechanics of a HUD Management and Occupancy Review (MOR)	5/19/17, 2:00pm (CST)	8/11/17, 2:00pm (CST)
Resolution Secrets for EIV Income Discrepancies (Multifamily System)	6/12/17, 11:00am (CST) 7/11/17, 2:00pm (CST)	9/18/17, 11:00am (CST) 10/17/17, 2:00pm (CST)

Advanced:

WEBINAR	DATES/TIMES	
Understanding Your New VAWA Compliance Obligations <i>*** (New Offering for HUD Properties) ***</i>	6/15/17, 2:00pm (CST) 7/14/17, 11:00am (CST)	9/21/17, 2:00pm (CST) 10/20/17, 11:00am (CST)
Understanding the Impact of TRACS 203A <i>*** (New Offering for HUD Properties) ***</i>	5/25/17, 2:00pm (CST)	6/19/17, 2:00pm (CST)
Creating and Reporting Repayment Agreements	6/12/17, 2:00pm (CST) 7/12/17, 11:00am (CST)	9/18/17, 2:00pm (CST) 10/18/17, 11:00am (CST)
Compliance Challenge Course	6/13/17, 11:00am (CST) 7/13/17, 11:00am (CST)	9/19/17, 11:00am (CST) 10/19/17, 11:00am (CST)
Updating Affirmative Fair Housing Marketing Plans on a Budget	6/13/17, 2:00pm (CST)	9/19/17, 2:00pm (CST)
EIV Income Discrepancy Curve Balls	6/14/17, 11:00am (CST)	9/20/17, 11:00am (CST)
Section 8 Renewal Policy Options Training <i>*** (2 hours) ***</i>	6/20/17, 2:00pm (CST)	9/20/17, 2:00pm (CST)
Stress Free MORs- Maximizing Optimal Results <i>*** (2 hours) ***</i>	6/15/17, 11:00am (CST) 7/13/17, 2:00pm (CST)	9/21/17, 11:00am (CST) 10/19/17, 2:00pm (CST)