



Blended Occupancy Specialist

Advanced training for managers of properties receiving assistance from multiple housing programs

Blended Occupancy Specialist (BOS) is a comprehensive study of the compliance challenges posed by blended sites, focusing on where the rules overlap, where they differ, and how to steer a compliant path through it all.

Who should attend: Owners/agents/regional managers/supervisors or site managers who have properties with any combination of HUD, Tax Credit, and HOME involvement.

OVERVIEW

Properties with multiple housing programs in place —also known as blended, layered, or combo sites—are becoming more and more common in our industry. As a consequence, a critical need exists for managers who understand the different regulatory requirements of each program and how to ensure compliance with them. Blended Occupancy Specialist (BOS) grew directly out of this need.

WHAT YOU’LL LEARN

The most significant challenge that confronts an owner or agent of a blended site is the management of compliance. While there are areas where the HUD, Tax Credit and HOME rules are identical or complement each other, there are also instances of conflict. It is the conflicting areas that threaten to create compliance chasms or gaps. And regardless of the program type, being out of compliance can cost time and money!

BOS provides a comprehensive understanding of where the compliance rules for these programs overlap and where they differ. More importantly, the course provides all the tools you’ll need to develop a personal compliance and management matrix in order to establish good compliance strategies and maintain compliance at your blended sites.

PREREQUISITES

BOS is an advanced course that focuses on the management of multiple compliance-related functions. For this reason, COS or TCS certification or its equivalent is required for registration.

PILLAR COURSE:	No
DURATION:	Three-day program
CERTIFICATION / EXAM:	Includes half-day certification exam
INSTRUCTION FORMAT:	Lecture with group work
PREREQUISITES:	Tax Credit Specialist (TCS), Certified Occupancy Specialist (COS), or equivalent
INTENDED AUDIENCE:	Those with property impacted by HUD, tax credits, and/or HOME regulations
MATERIALS PROVIDED:	Resource manual, Powerpoint printout
MATERIALS TO BRING:	Calculator, highlighter, pen/pencil

Course agenda

DAY 1

- 8:00..... Registration
- 8:30..... Introduction
- 9:00 Sources of funding
- 10:00..... Break
- 10:15..... Managing program and eligibility compliance
- 12:00..... Lunch (not provided)
- 1:00..... Managing program and eligibility compliance (continued)
- 3:00..... Break
- 3:15..... Preparing to rent: Comparisons and contrasts
- 5:00 Class adjourned

DAY 2

- 8:30..... Review of Day One; Q&A session
- 9:00..... Renting the unit and meeting compliance challenges
- 10:00..... Break
- 10:15..... Renting unit and meeting compliance challenges (contd.)
- 12:00 Lunch (not provided)
- 1:00..... Managing the unit mix
- 3:00 Break
- 3:15..... Managing the unit mix (continued)
- 5:00..... Class adjourned

DAY 3

- 8:30..... Review of Day Two; Q&A session
- 9:00..... Collecting income, protecting investments, managing compliance
- 10:00 Break
- 10:15..... Collecting income, protecting investments, managing compliance (continued); completing your site-specific compliance management matrix
- 11:00..... Certification examination begins
- 1:30..... Certification examination ends; class adjourned



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