

*Lead the Way* offers countless ways to complete the curriculum, to meet your individual and board's needs. Commissioners may complete the curriculum independently as a part of their orientation to the PHA. Boards may wish to complete the curriculum over multiple days as a full group activity, to assure completion and mutual comprehension. However you decide to complete the curriculum, *Lead the Way* provides flexibility to dedicate time to topics that are new for you and your board, and briefly review topics where you and your board may have expertise.

In this guide, we offer five unique pathways for group learning as possible suggestions for completing *Lead the Way* with your board. A facilitator is not required to complete any of these pathways. However, it may be helpful to assign a coordinator, either from the board or from the PHA staff, to remind board members of their schedule and assignments through the curriculum.

Each pathway is designed to have a unique focus and to involve a different amount of time spent as a group to complete the curriculum. Review them and see what is the best fit for the needs of your Board.

## Pathway 1: All In

**Designed to create the broadest knowledge base with a modest amount of meeting time**

Each commissioner:

- Completes all nine sections including the quizzes
- Downloads the Quick Reference Guides
- Completes the “My Board” and “Know your PHA” worksheets.

Schedule an additional board meeting where commissioners may raise any quiz questions they wish to discuss and compare and compile their “My Board” and “Know your PHA” worksheets to create a comprehensive overview of their PHA.

Estimated time to complete:

- 5 individual hours
- 60-90 minutes of group meeting time

## Pathway 2: Apply What You Learned

**Try your hand at applying your knowledge to case examples**

Each commissioner:

- Completes all nine sections including the quizzes
- Downloads the Quick Reference Guides
- Downloads the following Story-Led Activities (found in the associated section resources):

- Asset Management
- Housing Choice Voucher Program
- Ethics
- Assessing and Improving your PHA

Schedule an additional board meeting to review the questions and answers within the activities and see if you can agree on your responses.

Estimated time to complete:

- 4 individual hours
- 90 minutes of group meeting time

## Pathway 3: Just the Facts

Covers basic information with a modest amount of meeting time

Each commissioner:

- Completes the following sections or designated subsections, including the quizzes:

### **Foundations: Fundamentals of Oversight (all)**

#### **Foundations: PH Basics**

- Historical Context
- Types of Public Housing
- Video: “States and Regulations”
- Funding
- Video: “Budget Shortfalls”

### **Foundations: Roles and Responsibilities (all)**

#### **Skills: Asset Management**

- Introduction
- Asset Management Business Model
- Video: “The Concept of Asset Management”
- Asset Management Goals
- Entities and Roles
- Story-Led Activity (Handout)

#### **Skills: Housing Choice Voucher Program**

- About the Housing Choice Voucher Program
- The Payment Standard
- Rent Reasonableness
- Housing Choice Voucher Funding

### **Skills: Budgets**

- Introduction
- Internal Controls
- Purpose of PHA Budgets

### **Skills: Ethics**

- Introduction
- Public Housing Projects Conflicts of Interest
- Video: “Conflicts of Interest”
- Story-Led Activity
- Hatch Act FAQs

### **Skills: Assessing and Improving your PHA**

- Importance of Assessment and Evaluation
- Oversight to Monitor and Improve Financial Viability of the PHA
- Story-Led Activity – Financial Viability

- Download all Quick Reference Guides
- Completes the “My Board” and “Know your PHA” worksheets

At a regular board meeting, commissioners raise any quiz questions they wish to discuss, and compare and compile their “My Board” and “Know your PHA” worksheets to create a comprehensive overview of their PHA.

## **Pathway 4: Financial Management of PHAs 201**

**Covers more in-depth content with a moderate amount of meeting time**

Each commissioner:

- Completes the following sections:
  - Foundations: Public Housing Basics**
    - Statutes and Regulations/ACC/PHA Policies and Procedures
    - PHA Funding
  - Skills: Asset Management**
    - Project-Based Housing
  - Skills: Housing Choice Voucher Program**
    - Housing Choice Voucher Funding
    - Strategies for Successful Housing Choice Voucher Programs
    - Portability
  - Skills: Budgets**
    - Reading PHA Budgets
    - Achieving Financial Viability
    - Pitfalls of Budgeting

Designate a board meeting, or schedule additional meetings for commissioners review their observations and share their questions regarding these sections. The board may invite PHA staff members or HUD staff to these discussions.

Estimated completion time:

- 2 individual hours
- 2-3 hours of board as a group

## Pathway 5: My Board/My Team

Allows each commissioner to choose their own pathway and then brings the board together to review quizzes and worksheets.

Each commissioner:

- Chooses to complete one of the following pathways listed above depending their experience and prior knowledge:
  - *All In*
  - *Just the Facts*
  - *Financial Management of PHAs 201*

As a group, the board completes the following sections, including quizzes:

- Ethics
- Assessing and Improving your PHA
- Know your PHA (which includes completing the “Know your PHA” worksheet)

### Suggested Meeting Formats for My Board/My Team

#### Option 1: The Fast Track

Preparation

- Schedule a time to meet for an extended session of 4 hours.
- Assign for a facilitator to help the group stay on track. This may be a PHA staff member, the executive director, a training consultant, or other volunteer.
- Ask one commissioner to download and copy all of the Quick Reference Guides and the “Know your PHA” and “My Board” worksheets for each board member.

At your Meeting

- Take turns summarizing the key points of each section they reviewed.
- Share and discuss quizzes answers.
- Ask one commissioner to compile the board’s answers on the “Know your PHA worksheet”.
- Review and complete the My Board worksheet as a group. Ask a second commissioner to make notes on the “My Board” worksheet about individual areas of expertise of each commissioner.

#### Option 2: Slow but Steady

Preparation

- Add an additional hour to each of your monthly board meetings over the course of six months.
- Ask two commissioners to review each of the following sections and be prepared to lead discussion during these additional hours:
  - Ethics
  - Assessing and Improving your PHA
  - Know your PHA

At each meeting, complete the following:

**Month 1:** Review “All In” pathway, lead by the commissioner that completed that pathway. Ask a second commissioner to make notes on the My Board worksheet about individual areas of expertise of each commissioner.

**Month 2:** Review “Just the Facts” pathway, lead by the commissioner that completed that pathway.

**Month 3:** Review “Financial Management of PHAs 201” pathway, lead by the commissioner that completed that pathway.

**Month 4:** Review “Ethics” lead by the 2 commissioners that completed this section.

**Month 5:** Review “Assessing and Improving your PHA” lead by the 2 commissioners that completed this section.

**Month 6:** Review “Know your PHA” lead by the 2 commissioners that completed this section. Ask one commissioner to compile the board’s answers on the “Know your PHA worksheet.”

For quizzes, share and discuss your answers.