



The City of New York
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Mayor

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Deputy Mayor for Economic Development & Rebuilding

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and Development**
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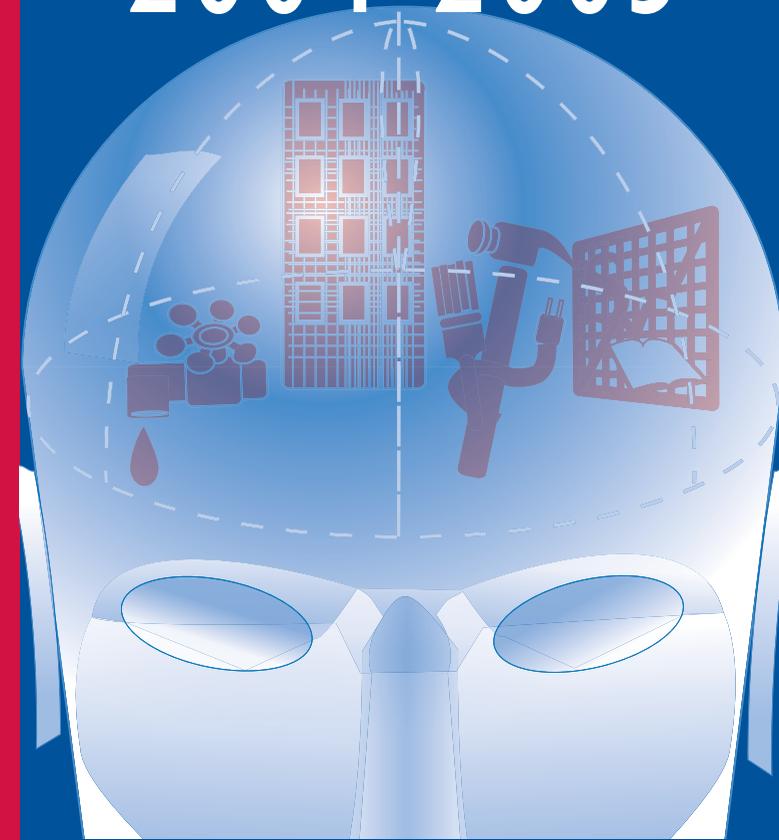
The City of New York
Department of Housing Preservation and Development

HOUSING EDUCATION SERVICES

COOPERATIVE TRAINING
FOR
TIL AND HDFC BUILDINGS

COURSE GUIDE

2004-2005



INTRODUCTORY REMARKS

The Department of Housing Preservation and Development is committed to the long-term preservation of housing in communities throughout New York City. In pursuit of this goal, HPD's Housing Education Services (HES) provides first-class, comprehensive training for tenants throughout the city.

This year, HES will commence special classes designed to provide in-depth instruction for tenants in our Tenant Interim Lease (TIL) Program. With nearly 350 buildings currently in the Tenant Interim Lease Program, TIL has become one of HPD's largest and most successful homeownership programs.

In the specially designed Introduction to TIL Management (104) and TIL Management Concepts Review (104.1) courses, HES has compiled detailed course materials dedicated to the fundamentals of managing cooperative housing. The special skills required for this environment are further developed in courses on TIL Monthly Reports (502), Rehab Awareness (503) and Computerized Management (505). These courses will provide the necessary tools for successful management and operation of TIL buildings, and will assist them in their transition to tenant-owned cooperatives. The range of courses developed for TIL underscores our commitment to the success of this innovative program.

In addition to offering classes for current TIL buildings, the Department of Housing Preservation and Development is offering a new series of classes for Housing Development Fund Corporations (HDFCs). In this specially designed series, shareholders in tenant-owned cooperatives will receive advanced training in cooperative management and finances. Special workshops will be held throughout the year on topics of particular relevance to management and maintenance for shareholders of HDFCs.

On behalf of HPD and TIL, I invite you to participate in HES's exciting courses, specially tailored for tenants in the Tenant Interim Lease Program. These courses will help guarantee our continued success in promoting a sound and healthy approach to homeownership throughout New York City.

Shaun Donovan
Commissioner
Department of Housing Preservation and Development

For more information contact:

Housing Education Program

City of New York
**DEPARTMENT OF HOUSING
PRESERVATION AND DEVELOPMENT**

100 Gold Street, Room 6C
New York, NY 10038

Telephone: (212) 863-8830

or visit our website at www.nyc.gov/hpd

*For additional copies of this Course Guide or applications,
please call HPD's Housing Education Program at (212) 863-8830.*

*For information about New York City government,
please call 311 – The New York City Citizen Service Center
24 hours a day, seven days a week.*

COURSE 804

COOPERATIVE WORKSHOPS *(continued)*

- Environmental Health
- Water and Energy conservation
- Green Buildings
- Community Development

These seminars are offered once a month throughout the year, from 6-9pm, in various locations. To register applicants should call (212) 863-8830 or register on line at www.nyc.gov/hpd.



*237 Hancock Street, Brooklyn New York
Housing Development Fund Cororation*

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COURSE 803

COOPERATIVE ACCOUNTING III: MONITORING, REPAIRS & RESALE (3 course hours)

This three-hour course is designed for the Boards of Directors of HDFCs and provides participants with skills to monitor their building's budget, make cost effective decisions on the repair or replacement of maintenance equipment and building systems, and determine the split of profits from re-sale of shares.

Topics include:

- Use of General Ledgers to Monitor Building's Budget
- Exercises to determine whether to Repair or Replace
- Check List to Safeguard Your Co-ops' Funds

Students who successfully complete the course will receive a certificate of course completion from HPD.

This course is offered several times, from 6-9pm, at various locations. To register applicants should call (212) 863-8830 or register on line at www.nyc.gov/hpd.

COURSE 804

COOPERATIVE WORKSHOPS (3 course hours)

This series of monthly seminars are designed to meet the needs and interests of the Boards of Directors and shareholders of HDFCs.

Topics include:

- Distressed HDFCs
- Insurance
- Ethics

COURSE 802**COOPERATIVE ACCOUNTING II: BUDGETING & MAINTENANCE FEES
(continued)**

Topics include:

- The Importance of Budgeting
- Income and Expense Statements
- Maintaining a Balance Sheet: Assets and Liabilities
- Understanding the Annual Financial Statement
- Developing a Budget, Guidelines for Budget Projections

Students who successfully complete the course will receive a certificate of course completion from HPD.

This course is offered several times a year, from 6-9pm, at various locations. To register applicants should call (212) 863-8830 or register on line at www.nyc.gov/hpd.

TENANT INTERIM LEASE (TIL) TRAINING**COURSE 104****INTRODUCTION TO TENANT INTERIM LEASE MANAGEMENT
(12 course hours)**

This course is designed for tenants of TIL Buildings under The Division of Alternative Management Programs. When a building enters the TIL program, it is important that the residents clearly understand their responsibilities under the Tenant Interim Net Lease. This four-session course will provide participants with information and skills needed to successfully transition from the TIL Program to an HDFC cooperative.

Topics include:

- What is the TIL Program
- The TIL Net Lease
- Working with HPD Staff
- Rent Increases
- Establishing an effective Tenant Association
- Election Process
- Duties of the Elected Officers
- TIL By-Laws and House Rules
- Establishing a Repair and Maintenance Committee
- Tips on Holding Meetings
- Rent Collection and Eviction Policy
- Understanding Housing Court
- Apartment Leases
- Commercial Leases
- Hiring a Superintendent

Students who successfully complete the course will receive a certificate of course completion from HPD.

This course is offered one day a week for four weeks, several times a year, from 6-9 pm at 100 Gold Street. To register applicants should call (212) 863-8830 or register on line at www.nyc.gov/hpd.

COURSE 104.1 TENANT INTERIM LEASE MANAGEMENT CONCEPTS REVIEW
(12 course hours)

This is a refresher course designed for newly elected Tenant Association Officers and TIL Buildings requiring additional assistance. One of the mandates of the TIL Net Lease is that Tenant Associations must hold annual elections. Therefore, it is important that the new officers know what their roles are, and the importance of implementing policy in a democratic decision-making environment. This course also reviews the TIL objectives and the various management techniques that promote resident cooperation and participation.

Topics include:

- Understanding the TIL Net Lease & By-Laws
- Establishing Good Communication Skills
- Case Studies in Problem Solving
- The Annual Election Process and Transfer of Authority
- How to be effective Tenant Association Officers
- Creative ways to increase tenant participation and cooperation
- Overcoming Internal Conflict

Students who successfully complete the course will receive a certificate of course completion from HPD.

The course is offered one day a week for four weeks, several times a year, from 6-9pm at 100 Gold Street. To register applicants should call (212) 863-8830 or register on line at www.nyc.gov/hpd.

COURSE 203.1 TENANT INTERIM LEASE BUILDING FINANCE (18 course hours)

This course is required for all Tenant Association Officers.

Managing a TIL building is similar to running a small business. Whether or not the small business will succeed depends in large part on the effectiveness of the financial management practices of that business. In the TIL program, the tenant association takes responsibility for managing its own income, expenses, and budget. Through the use of case studies, participants will develop a thorough understanding of the financial principles used in managing TIL residential property.



*Closing of 1840 7th Avenue, Manhattan 10026
Pictured above from left to right: Julia Butler, Building Coordinator; Anne-Marie Hendrickson, Assistant Commissioner; Mildred Velez, Director of Operations; Donald Hamilton, TA President; Sheila Smalls, TA Attorney; Adrian Bailey, TA Secretary; Mary Ann Mullett, TA Treasurer*

COURSE 801**COOPERATIVE ACCOUNTING I: (3 course hours)**

This three hour course is designed for the Boards of Directors of HDFCs, introduces the participants to the development and maintenance of a comprehensive and financial record keeping system that includes the preparation of cash receipts, rent rolls, cash disbursements and a complete review of reconciling bank statements.

Topics include:

- Components of a filing system - Source Documents
- The organization of a Filing System
- Ensuring the Security of Your Files
- Cash Receipts For maintenance & Rent Roll
- Cash Disbursement Form
- Maintenance and Reconciliation of Bank Accounts
- The Monthly Statement

Students who successfully complete the course will receive a certificate of course completion from HPD.

This course is offered one day a week several days a year, from 6-9pm, at various locations. To register applicants should call 212) 863-8830 or register on line at www.nyc.gov/hpd.

COURSE 802**COOPERATIVE ACCOUNTING II: BUDGETING & MAINTENANCE FEES (3 course hours)**

This three-hour course is designed for the Boards of Directors of HDFCs and introduces the participant to the process of developing a budget, the maintenance of an income and expense record, the uses of a building's annual financial statement and utilizing the information to better manage their buildings. Upon completion of this session, participants will be able to project the following year's budget and its impact on maintenance costs.



General Tenants Association Meeting

COURSE 203.1 TENANT INTERIM LEASE BUILDING FINANCE (continued)

Topics include:

- Developing an accounting system for receipts and disbursements
- Reviewing monthly bank statements
- Monthly financial obligations
- Income and expense budgeting
- Rent collection policies
- Completing bank deposit slips
- Writing checks to pay bills
- Creating a filing system
- Bank reconciliation
- Monthly summary report
- Management Fees

Students who successfully complete the course will receive a certificate of course completion from HPD.

This course is offered one day a week for six weeks, several times a year, from 6-9pm at 100 Gold Street. To register applicants should call (212) 863-8830 or register on line at www.nyc.gov/hpd.

COURSE 502 **TENANT INTERIM LEASE MONTHLY REPORTS (9 course hours)**

This course is designed for Tenant Association Officers and is a must for Tenant Association Treasurers.

Participants will learn how to complete monthly reports as required by HPD.

Topics include:

- Understanding Spreadsheets
- Understanding opening and ending balances
- Calculation of total expenses and disbursements
- Reconciliation
- Importance of Computers in Building Management

Students who successfully complete the course will receive certificate of course completion from HPD.

This course is offered one day a week for three weeks, several times a year, from 6-9pm at 100 Gold Street. To register applicants should call (212) 863-8830 or register on line at www.nyc.gov/hpd.

COURSE 503 **TENANT INTERIM LEASE REHAB AWARENESS (9 course hours)**

Participants will learn the process by which their building is being renovated and how they will be affected by each phase of the process.

Topics include:

- Understanding the phases of rehabilitation and tenant association responsibilities
- Understanding the standard scope of work and Architectural plans
- The role of the Construction Managers, the General Contractor, and HPD
- Understanding the Relocation Process and available resources
- Move-in process

Students who successfully complete the course will receive a certificate of course completion from HPD.

This course is offered one day a week for three weeks, several times a year, from 6-9pm at 100 Gold Street. To register applicants should call (212) 863-8830 or register on line at www.nyc.gov/hpd.

COURSE 705 **SHAREHOLDER TRAINING (continued)**

- Rights and responsibilities of shareholders
- Rights and responsibilities of Board of Directors
- Election process

Students who successfully complete the course will receive a certificate of course completion from HPD.

This course is offered several times a year from 6-9pm at various locations. To register applicants should call (212) 863-8830 or register on line at www.nyc.gov/hpd.

COURSE 706 **HIRING PROFESSIONALS (3 course hours)**

Designed to help HDFC Boards of Directors hire professionals such as accountants, attorneys, architects, engineers, contractors and vendors. This course covers how to select qualified service and professional staff by reviewing sample resumes and applications, practicing interview techniques, and checking references.

Topics Include:

- Why hire?
- How to evaluate and review a scope of work
- The hiring process
- Understanding and reviewing contracts

Students who successfully complete the course will receive a certificate of course completion from HPD.

This course is offered several times a year, from 6-9pm at various locations. To register applicants should call (212) 863-8830 or register on line at www.nyc.gov/hpd.

COURSE 704 HIRING AND SUPERVISING EMPLOYEES (3 course hours)

This course is designed for the Boards of Directors of HDFCs, and discusses both the legal and human relations aspects of working with professional and service employees. Case studies highlight various management techniques for hiring and supervising employees.

Topics include:

- Employee supervision
- Lines of Authority
- Understanding and reviewing contracts (general)
- Supers Contracts
- Management Contracts
- Union issues
- Payroll taxes and Workman's Compensation
- Workman's Compensation
- Employee evaluation
- Conflicts of interest

Students who successfully complete the course will receive a certificate of course completion from HPD.

This course is offered several times a year, from 6-9pm at various locations. To register applicants should call (212) 863-8830 or register on line at www.nyc.gov/hpd.

COURSE 705 SHAREHOLDER TRAINING (3 course hours)

Through group discussions, presentations, and written exercises, participants will learn the indicators of a healthy cooperative.

Topics Include:

- What is an HDFC
- How is a HDFC structured
- The corporations responsibilities
- Purpose of legal documents
- What are Certificate of Shares

COURSE 504 TIL MONTHLY SEMINARS (3 hours)

These seminars are offered once a month to address topics of interest to tenant associations . Topics include:

- Money Smart
- Green Buildings
- Water & Energy Conservation
- Environmental Health
- Health and Safety
- Lead Awareness
- Community Outreach
- Running a Meeting
- Ethics

These seminars are offered on a monthly basis, from 6-9pm at 100 Gold Street. To register applicants should call (212) 863-8830 or register on line at www.nyc.gov/hpd.

COURSE 505 TENANT INTERIM LEASE COMPUTERIZED MANAGEMENT (12 hours)

This course is designed for Tenant Association Officers.

Participants will learn basic Real Estate Management Computer Programs.

Topics include:

- Excel Spreadsheets
- Microsoft Access
- Computer Programs for Property Management.

Students who successfully complete the course will receive a certificate of course completion from HPD.

This course is offered one day a week for four weeks, from 6-9pm at 100 Gold Street. To register applicants should call (212) 863-8830 or register on line at www.nyc.gov/hpd.

HOUSING DEVELOPMENT FUND CORPORATION (HDFC) TRAINING

COURSE 701 COOPERATIVE MANAGEMENT I: CO-OP CONVERSION (3 course hours)

This course is designed for TIL tenant association members and HDFC shareholders. This one-session course will provide participants with information on the transition from TIL to a Housing Development Fund Corporation (HDFC). Topics include:

- What you need to know before and after the closing
- The concept of cooperative management
- Understanding the disposition plan
- No Action Letters
- New financial responsibilities as a cooperative
- The legal responsibilities of cooperatives and the laws governing them
- Annual Elections and By-Laws
- Proprietary Lease and House Rules
- Regulatory Agreement
- The requirements and process for becoming a shareholder
- Agenda items for the first shareholder meeting.
- After Sale Agreement
- Case Studies for solving problems in HDFCs

Students who successfully complete the course will receive a certificate of course completion from HPD.

This course is offered several times a year, from 6-9pm at various locations. To register applicants should call (212) 863-8830 or register on line at www.nyc.gov/hpd.

COURSE 702 ADVANCED COOPERATIVE MANAGEMENT (BOARD OF DIRECTORS) (3 course hours)

Participants will review and discuss the fiduciary responsibilities of the Board of Directors and the importance of establishing good leadership techniques. This course is provided in a workshop format.

COURSE 702

ADVANCED COOPERATIVE MANAGEMENT (BOARD OF DIRECTORS) (continued)

Topics include:

- Leadership Qualities
- Shared Leadership
- Election Process
- Obligations to shareholders
- Creative ways to increase shareholder participation and cooperation
- Staying afloat: Paying the bills and balancing the books
- Assets and liabilities
- Knowing your building systems
- Self-management or hired manager
- Case Studies in Problem Solving

Students who successfully complete the course will receive a certificate of course completion from HPD.

The course is offered several times a year, from 6-9pm at various locations. To register applicants should call (212) 863-8830 or register on line at www.nyc.gov/hpd.

COURSE 703

SELLING APARTMENTS (3 course hours)

Participants will receive a thorough understanding of the procedures for selling apartments. This course is provided in a workshop format. Participants are requested to bring their bylaws and propriety leases.

Topics include:

- Board responsibilities
- Resale restrictions
- Flip tax
- Regulatory Agreement
- Right of first refusal
- Non discrimination
- Interviewing prospective tenants

Students who successfully complete the course will receive a certificate of course completion from HPD.

This course is offered several times a year, from 6-9pm at various locations. To register applicants should call (212) 863-8830 or register on line at www.nyc.gov/hpd.