

PNABP884

**Annual Agenda of
Short-Term Training
Activities in
Housing and Urban
Development**

1992-1993

January 1993

**ANNUAL AGENDA OF SHORT TERM TRAINING ACTIVITIES
IN HOUSING AND URBAN DEVELOPMENT**

1992-93

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INTRODUCTION

The Annual Agenda of Short-Term Training Activities lists six short courses which will be offered in the U.S. over the forthcoming fiscal year. The Agenda focuses primarily on those training activities to which the Office of Housing and Urban Programs has sponsored participants in the past years. The emphasis is on policy oriented courses or those which provide a mix of policy and skills training.

The target audience for this level of training is envisaged as senior level individuals whose responsibility extends to the formulation and implementation of policy in the area of housing.

The Agenda represents a comprehensive, but by no means an exhaustive, list of all short courses which relate to housing and urban development offered in the U.S. Any inquiries regarding these training programs should be directed to the Office of Housing and Urban Programs' Training Officer.

COURSE TITLE :

HOUSING FINANCE TRAINING PROGRAM

TRAINING INSTITUTION :

UNIVERSITY OF PENNSYLVANIA
International Training Program
Fels Center of Government
Philadelphia, Pennsylvania

KEY FACULTY :

Jack M. Guttentag
William Grigsby
Richard Herring

Marja Hoek-Smit
Anthony M. Santomero

TARGET AUDIENCE :

Senior and middle level officials of public and private agencies in developing countries, dealing with development of housing finance policy and systems. The program aims at a mixture of participants from both the public and private sectors, to stimulate the interaction between officials with government and non-government backgrounds.

OBJECTIVES :

Educate participants in institutional, managerial, and mathematical aspects of housing finance.

ISSUES ADDRESSED :

Functional and Institutional building blocks of a housing system - Functions of housing finance institutions; the regulations of housing finance systems; the policy mechanisms for influencing the flow of resources in the residential sector.

Mechanisms for attracting savings into the housing market - Savings-for-housing instruments; deposits, debentures, and other united liabilities; collateralized mortgage obligations.

Allocations of Mortgage Funds to middle and low income groups - Role and limitations of various types of subsidy arrangements, government quotas and directives; private market allocation.

The role of markets in housing finance systems - Primary versus secondary loan markets; requirements for making mortgages marketable; marketability and insurance; marketability and rating agencies.

Types and uses of mortgage loan instruments - Fixed versus variable rate mortgages, market conditions and administrative considerations affecting the use of various types of mortgage rates.

Management problems in housing finance - Loan origination and servicing functions; loan default and delinquency control; interest rate policy and subsidy program administration.

The mathematics of housing finance - Diagramming cash flows; calculating internal rates of return, present/future values and annuities; calculating mortgage payments.

COURSE STRUCTURE :

Intensive training program combining lectures, seminars, field visits and workshops to train participants in housing finance. The issues listed above will be adjusted to reflect the specific needs of the participants. For senior staff of government and non-governmental housing finance agencies responsible for developing housing finance policy and finance systems, the emphasis will be macro governmental and market institutions, which guide housing finance systems. For middle-level government officials and personnel of housing finance institutions, the course will emphasize the managerial and administrative aspects of housing finance. For both groups, attention will be given to the housing finance system in general.

The use of micro-computers for financial analysis and information management will be an important part of the course. Appropriate training will be provided. Also each participant will be provided with a programmable HP-19BII financial calculator.

FIELD VISITS :

Field visits to public and private housing finance institutions are important components of the course.

LANGUAGE AND OTHER REQUIREMENTS :

The course is conducted in English. Language facilitation will be available for French and Spanish.

DATES AND LENGTH OF COURSE :

May 1993
Three weeks

MAXIMUM NUMBER OF PARTICIPANTS :

25 participants

TUITION COSTS :

\$4,500 plus per diem. Travel to and from Philadelphia, Pennsylvania is not included.

GENERAL INFORMATION :

The program also offers tailor-made workshops in specific housing finance topics, such as, computer based mortgage design, financial risk management for housing finance institutions, resource mobilization for housing finance.

Fels began offering this course in 1987. Six courses have now been held with the majority of the participants funded by USAID. It has attracted participants from most of the RHUDOs.

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COURSE TITLE :

**UNDERSTANDING AND IMPLEMENTING PUBLIC/PRIVATE VENTURES
IN URBAN DEVELOPMENT AND SHELTER**

TRAINING INSTITUTION :

TECHNICAL SUPPORT SERVICES, Inc/
FIRST WASHINGTON ASSOCIATES , Ltd
TSS Private Sector Training Program
Washington, D.C.

KEY FACULTY :

Royce LaNier	Dale Gianfurco
Albert Massoni	Joni Leithe
Carol Oman	April Young
Ian Quarterly	Frederick Zamon

TARGET AUDIENCE :

Public sector officials responsible for shaping regulatory and monetary policy and those charged with urban development responsibilities at the local and/or central government levels.

Private sector financiers, business executives, or entrepreneurs involved in urban development, shelter provision, or other urban investment activities.

OBJECTIVES :

This workshop/seminar will focus on how to best meet the needs of the private investor and public policy maker. Public sector officials will gain a better understanding of how to structure private sector incentive programs and work with private sector companies to achieve public policy objectives. The private sector participants should leave the course with a heightened awareness of the potential for private sector investment in shelter and development activities.

ISSUES ADDRESSED :

A supportive policy environment - A critical look at the elements which constitute governments' real policies affecting private investment in urban development and shelter.
The key role of private sector managers and entrepreneurs - Perceived or real constraints and opportunities that affect private sector investment. Innovative approaches used in both U.S. and developing countries will be reviewed.

The key action of government officials - Imaginative planning and strategic investment of limited public resources are the key tools available to government to stimulate private sector investment. Local and central government program experience both in U.S. and in developing countries will be examined.

Reconciling motivational differences - The public sector's concern with perceived need and the private sector's response to effective demand will be analyzed. Participants will be shown how to define the market for shelter and urban services and determine the conditions under which lower income families will invest their limited resources.

Judicious use of incentives - The presentation will focus on which incentives work and which ones do not and the means to develop these incentives needed to make private investment appealing without draining the public treasury.

Structuring a public private venture that works - The key elements of successful public/private ventures will be presented. Actual project experience will be used to illustrate why essential elements such as risk must be retained.

COURSE STRUCTURE :

A combination of seminar and workshop format will be used. There will be informal presentations by experienced practitioners with an opportunity for extensive participant interaction in group discussion and on an individual basis. The analysis of developing country examples will be through group discussions after brief presentations by one or more of the core TSS staff. A small group exercise will analyze the potential effectiveness of a hypothetical program.

FIELD VISITS :

Presentations of the examples from the U.S. will include visits to the offices and project sites of the public agencies, lenders or private developers responsible for innovative approaches.

LANGUAGE AND OTHER REQUIREMENTS :

Fluency in reading and writing in English is required.

DATES AND LENGTH OF COURSE :

November 1993.
Two weeks.

MAXIMUM NUMBER OF PARTICIPANTS :

20 participants.

TUITION COSTS :

\$3,800, which includes field visits and lodging costs. Participants are responsible for the costs of transportation, food, and incidental personal expenses.

GENERAL INFORMATION :

This course was first offered during Fall 1989.

CONTACT :

Course Director
TSS Private Sector Program
1501 Lee Highway, Suite 302
Arlington, VA 22209

Tel : 703-525-0966
Fax : 703-276-8851

COURSE TITLE :

FINANCING URBAN INFRASTRUCTURE AND SERVICES

TRAINING INSTITUTION :

THE RESEARCH TRIANGLE INSTITUTE (RTI)
Urban Financial Management Training Program
Research Triangle Park, N.C.

KEY FACULTY :

Jerry Van Sant
Ronald W. Johnson
Henry P. Minis
Brad J. Schwartz

Alan S. Wyatt
Daniel L. Goetz
James S. McCullough

Additional faculty include professors from the Institute of Government and Department of City and Regional Planning, University of North Carolina.

TARGET AUDIENCE :

Participants should be officials responsible for the formulation and implementation of municipal development policy. They should hold responsible positions in central, regional, or local government agencies charged with the planning, design, and implementation of urban development projects or public services at the local level.

OBJECTIVES :

To present the principals of public finance as they apply to urban infrastructure and services and to provide practical applications drawing from the US and developing country local government models.

ISSUES ADDRESSED :

Urban Planning and Municipal Administration - Public versus private goods as determinants of government responsibility in service delivery; allocation of service delivery among different levels of government; managing systemic and organizational changes.

Public Finance - Analysis of current local revenue and expenditures; forecasting of financing potential of local governments based on current financial status; inter-governmental fiscal relations; forms of taxation and their impact on revenues and incentive structures; performance measurement; user tariffs.

Capital Investment Decision-Making - Relationship between revenue and expenditure analysis and capital investment planning; revenue generation alternatives and cost recovery; infrastructure investment planning and finance; the role of infrastructure in promoting local and regional economic development; public/private partnerships.

COURSE STRUCTURE :

The course is divided into nine modules that incorporate the issues outlined above:

Introduction to US Local Government Systems
Concepts of Public Finance
Capital Investment Planning and Budgeting
Urban Planning and Regional Development
Cost Recovery and User Fees
Infrastructure Finance
Public/Private Partnerships
Performance Measurement

Each module employs seminars, individual or group exercises, and field trips. The course provides a mixture of case studies and specially designed exercises that promote close interaction among the participants and training staff. Field trips to local government agencies in North Carolina are used to demonstrate how the principles presented in the lectures are applied.

LANGUAGE AND OTHER REQUIREMENTS :

Fluency in English is required. Future courses may be offered in Spanish and French.

DATES AND LENGTH OF COURSE :

September 13 - October 1, 1993.
Three weeks.

MAXIMUM NUMBER OF PARTICIPANTS :

Each course is limited to fifteen (15) participants with representation sought from 3 to 4 countries.

TUITION COSTS :

\$4,000 (includes registration fees and materials). Participant's international travel to and from RTI, and lodging is not included. Ground transportation is provided between RTI

and participants place of lodging. The suggested per diem is \$94 or maximum A.I.D. rate.

GENERAL INFORMATION :

This course has been held annually since 1984. Similar courses have been developed for particular audiences such as a Spanish language course in January 1989 at the request of USAID/El Salvador and summer courses for local and central government officials from Indonesia from 1990-92.

CONTACT :

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Urban Financial Management Training Program
Research Triangle Institute
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Research Triangle Park, NC 27709-2194

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Telex: 802509 (RTI RTPK)
Cable: RESTRINS, Raleigh, N.C., U.S.A.
Fax : 919-541-6621

COURSE TITLE :

HOUSING/SETTLEMENTS/INFRASTRUCTURE IN DEVELOPING COUNTRIES

TRAINING INSTITUTION :

MASSACHUSETTS INSTITUTE OF TECHNOLOGY
School of Architecture and Planning
SIGUS, Special Program for Visiting Practitioners
Cambridge, Massachusetts

KEY FACULTY :

Reinhard Goethert

Core Faculty are selected according to the interest area of the participants. Other faculty may be drawn in as needed to explore different topics.

TARGET AUDIENCE :

Each participant is requested to bring a project or housing program in which they are currently involved, or which is of particular interest to them. The chosen project should allow concentration on physical planning, programming or design.

Projects from participants have included the following topics:

- Direct Construction and the Million Houses Program: Strategies for the Jumma Masjid Housing Development in Colombo, Sri Lanka;
- Reference Models for Mahaweli Rural Settlements in Sri Lanka; and
- An approach to Rebuilding Settlements in Disaster Situations in Egypt.

Suitable reports are published and distributed as part of the "Working Paper Series" of the SIGUS Program of the Department of Architecture.

COURSE STRUCTURE :

Participants bring their own projects and programs to evaluate and develop under faculty supervision. The program is structured around three areas: 1) three Special Interest Group in Urban Settlements (SIGUS) interactive workshops presented by guest faculty on theory vs. practice in community based design, 2) five weeks of tutorial sessions based on projects and programs of each participant, 3) supplementary activities and lectures.

LANGUAGE AND OTHER REQUIREMENTS :

Fluency in reading and writing English.

DATES AND LENGTH OF COURSE :

February - April, annually.

Two weeks minimum, three months maximum.

TUITION COSTS :

Total cost for each participant is \$2600. This includes three SIGUS workshops at \$200 each, eight weeks of administrative costs at \$250 per week. Costs for shorter stays are pro-rated. Living expenses, housing and transportation are not included. Approximately \$200 should be additionally budgeted for text preparation. Estimated cost of living: \$550 per month.

CONTACT :

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COURSE TITLE :

PUBLIC PRIVATE PARTNERSHIPS IN URBAN DEVELOPMENT

TRAINING INSTITUTION :

HARVARD UNIVERSITY
Graduate School of Design
International Training Program
Cambridge, Massachusetts

KEY FACULTY :

Francois Vigier, Program Director
James Christian
David Jones

Victor Karen
Mona Serageldine
Barry Shaw

TARGET AUDIENCE :

Middle and senior level professionals responsible for urban and regional planning and the management of urban programs.

OBJECTIVES :

To develop professional decision making skills by examining different sets of inter-relationships among policy variables as they affect the design implementation of urban programs.

ISSUES ADDRESSED :

This year's ITP focuses on the analysis, programming, evaluation, and management of different scales developed through public/private partnerships. The program consists of six modules:

Project Evaluation Techniques - The planning and programming of large scale projects require the simultaneous manipulation of social, economic and physical variables to arrive at realistic solutions. The use of a computerized model allows participants to relate physical and socio-economic parameters and explore ways to meet the needs of a target population. The direct and indirect real costs to public and private sponsors are assessed under alternative policy approaches. The interactive approach highlights key decision points and enables participants to quickly trace the repercussions of modifying any one variable on project feasibility.

Finance Management of Public Investments - The conceptualizing of realistic urban projects and capital investment programs requires an understanding of public financial and administrative management techniques. This module explores ways in which private enterprise can become an effective partner in urban development through creative financing, cost recovery, and resource mobilization. The trade offs between profit making and social concerns are identified as are ways to finance the efficient and economical operation and maintenance projects.

Urban Regeneration and enterprise zones - Cities all over the world are faced with the necessity to promote economic development, revitalize older districts, and upgrade under-served zones. Public agencies are finding it increasingly difficult to undertake the task alone. The ability to induce private sector involvement has become key to the success of these interventions. Case studies will illustrate innovative approaches to public/private partnerships focusing on methods of attracting private investment, meeting economic and social objectives, and recovering the cost of public investments in land and infrastructure. This module will present programming and evaluation techniques that permit the assessment of alternative development policies on financing and institutional strategies and on achieving program objectives.

Privatization and Management of Multifamily Housing - The ability to generate private finance and work in partnership with the private sector is becoming a key part of the private sector's enabling role. This module evaluates the approaches used by the different countries to attract private funds in the production and operation of affordable housing. The examination of successful examples of privatization of public housing highlights key factors underlying the ability to expand home ownership, preserve rental units and safeguard affordability. The contribution of public private partnerships to the improvement of existing housing stock and the supply of new housing is reviewed. Particular attention is given to policies fostering the role of housing association and community based development organizations in the production and management of affordable housing. The use of a computerized model allows participants to explore strategies to reconcile the socio-economic characteristics of a target population with the physical and financial parameters of housing production.

Financing Affordable Housing - Worldwide public budgetary resources are insufficient to meet the capital requirements needed to house limited income families. Mobilizing private sector financial resources, often in an inflationary economic environment is therefore an essential ingredient of affordable housing programs. This module examines alternative financial instruments, methods and criteria for mobilizing private sector funding, and reviews the different view points of the lending institutions, the developers and the public agencies sponsoring the program. Drawing on case studies, the module will analyze the financial packages underlying the delivery of affordable housing by public and private sponsors.

Course Synthesis - The final module provides an opportunity to synthesize course

material through a simulated development of a large scale housing project. Working in teams, participants will determine appropriate strategies to generate private participation in the project, program its development and assess its financial feasibility from the point of view of both public and private sponsors.

COURSE STRUCTURE :

The program is organized in a modular format structured for team teaching. The sequence of modules form an integrated pedagogic unit covering key topics in public private partnerships in urban development. Participants benefit from the combination of theoretical and practical issues and state-of-the-art techniques of analysis. Class presentations and discussions are enriched with extensive case studies around the world using visual, cartographical and statistical information. Participants are encouraged to discuss the projects they are currently involved with, assess the applicability of the concepts and techniques presented in the class to their work and evaluate how these can be adopted in order to reflect conditions prevailing in their own countries.

Interactive, user friendly microcomputer models are used extensively in class demonstrations and each participant has the opportunity to use the interactive programs that have been specifically designed for the ITP. No prior computer experience is required.

FIELD VISITS :

Visits to urban projects and public agencies in the greater Boston area are an integral part of the program.

LANGUAGE AND OTHER REQUIREMENTS :

All classes are conducted in English. A TOEFL examination is normally required of all applicants from non-English speaking countries.

DATES AND LENGTH OF COURSE :

July 7 - July 30, 1993.

MAXIMUM NUMBER OF PARTICIPANTS :

10-15 participants.

TUITION COSTS :

\$4,500 per person (covers course materials, study tours, and health and casualty insurance for duration of the program). Participants are responsible for the cost of the

travel, accommodations, food, and incidentals. Hotel accommodations range from \$80-120 for single occupancy and \$44-65 per person double occupancy. Dormitory accommodations are also available at \$35 per night. The suggested per diem for food and incidental expenses is \$40.

GENERAL INFORMATION :

The International Training Programs have been offered annually since 1982. To date participants from the following countries have attended the programs: Bangladesh, Botswana, Chile, China, Gambia, Ghana, India, Indonesia, Iraq, Jamaica, Jordan, Korea, Kuwait, Malawi, Morocco, Pakistan, the Philippines, Saudi Arabia, Thailand, Trinidad, Uganda, the United Arab Emirates, Zanzibar, and Zimbabwe.

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