Closing Session

HUD Intermediary, State HFA and MSO Conference

August 10, 2016

Speakers

- Robin Penick, Housing Technical Specialist, Office of Housing Counseling

- Sarah Gerecke, Deputy Assistant Secretary, Office of Housing Counseling

- Shawna LaRue Moraille, ICF International

Closing Agenda

- Meeting evaluation

- Update on ICF Technical Assistance

- Peer-to-Peer Breakout Summaries

Meeting Evaluation

- Evaluation is provide in the meeting folders; however, we strongly recommend you use the link:

    - https://www.surveymonkey.com/r/2016HousingCounselingConference

- Feedback on the meeting is very important for further improvements in the future

- Thank you for your participation!

ICF Technical Assistance

- Online Training
  - Network Monitoring
  - Basic topics: Intro to Housing Counseling, Housing Counseling Services and Recordkeeping, Work Plans
- Toolkits
  - HUD Eligibility Criteria, including an online self-assessment tool
  - Reporting
  - Quality Control

Peer-to-Peer Breakout Summaries

- #1: HUD Housing Counseling Program Potential Policy Changes

- #2: HUD Performance Reviews of Sub-Grantees

- #3: Using Technology in Housing Counseling

- #4: OMB Requirements for Monitoring

HUD Housing Counseling Program Potential Policy Changes

- Lessons learned/best practices
  - Dramatic shift in society (e.g., social media, online/virtual)
  - Change in handbook/regulations timely
- OHC suggestions
  - Clarify what is "HUD-Approved", "participating agency"
  - Hold one or more stakeholder policy calls on policy
  - Adopt policies around technology usage in providing housing counseling

HUD Performance Reviews of Sub-Grantees

- Lessons learned/best practices
  - Coordinate with HUD POC (e.g., joint reviews, joint letters, etc.)
  - Develop tools, templates, etc.
  - Perform pre/mock monitoring in advance of HUD review
- OHC suggestions
  - Provide basic training on the requirements
  - Ensure training is low cost and/or provide additional $ for subsidies to attendees
  - Provide standard tool for HUD Eligibility

Using Technology in Housing Counseling

- Lessons learned/best practices
  - Have counselors who are knowledgeable local experts
  - Maintain local connections to banks, market, etc.
  - Use personal finance tools to automate routine collection of client information

- OHC suggestions
  - Explore bricks and mortar geography requirement
  - Look at gathering and publicizing models for virtual counseling
  - Look at other industries for best practices in virtual

OMB Requirements for Monitoring

- Lessons learned/best practices
  - Self certification for use of 10% de minimis rate
  - Encourage labor and fringe only if electing 10% de minimis rate
  - Alternatives to a PAR (e.g., timesheet with activity codes)
  - Consider multi-tier/scorecard to determine nature, timing and extent of financial and administrative review
- OHC suggestions
  - Make sample tools, templates, etc. available to all agencies
  - Provide more customized training on certain topics
  - Demystify OMB requirements
  - Publish guidance, toolkit on merit based awards