



Office of Housing Counseling (OHC)

Looking to the Future: Innovations and Best Practices in Housing Counseling

HUD-Approved Intermediaries, State Housing Finance Agencies, and Multi-State Organizations

Educational and Networking Conference

Conference Date/Time: August 10, 2016

Conference Location: Auditorium A & B, U.S. Department of Housing and Urban Development (HUD), 451 7th Street, S.W., Washington, D.C., 20410

Conference Goals:

- Providing updates from OHC staff on key Housing Counseling Program issues and requirements
- Engaging in peer-to-peer discussions on key program topics and emerging trends
- Sharing best practices in program implementation by Oversight Agencies
- Learning about technological innovations that can make counseling services more efficient and effective

8:00am -9:00am **Registration and Networking** – Outside of Auditorium A & B

9:00am-9:15am **Opening Remarks from HUD**

The conference will open with brief remarks from HUD on the purpose of this conference, the importance of the HUD housing counseling program, OHC's priorities and importance of partnerships with conference participants, and review of the day's agenda.

- Robin Penick, Housing Technical Specialist, Office of Housing Counseling, U.S. Department of Housing and Urban Development (HUD)
- Sarah Gerecke, Deputy Assistant Secretary, Office of Housing, U.S. Department of Housing and Urban Development (HUD)
- Francey L. Youngberg, Deputy Assistant Secretary for Public Engagement, Office of Public Affairs

9:15am – 10:30am **Plenary Session – Latest News out of Office of Housing Counseling (OHC)**

The conference continues with this session on the latest news from the various offices within OHC including Policy and Grant Administration, Outreach and Capacity Building, and Oversight & Accountability. This session will discuss the latest program updates including hot topics such as the housing counseling certification, Federal Advisory Committee, and handbook updates. Edward L. Golding, Principal Deputy Assistant Secretary, Office of Housing has been invited. Finally, there will be time available at the end for Q and A.

- Facilitator: Sarah Gerecke, Deputy Assistant Secretary Office of Housing, U.S. Department of Housing and Urban Development (HUD)ro

- Brian Siebenlist, Office Director, Office of Policy and Grant Administration
- Jerrold Mayer, Office Director, Office of Outreach and Capacity Building
- Kisha Wright, Deputy Office Director, Office of Oversight & Accountability

10:30am – 10:45am Break

10:45am – 11:45pm **Peer-to-Peer Breakouts**

After the break, the first set of peer-to-peer breakout sessions will be held. Attendees should choose which session appeals to them the most and join the discussion. Each breakout will have a facilitator who will lead the discussion on the topic to generate a list of lessons learned as well as suggested next steps for OHC (e.g., additional toolkits, training, and/or outstanding policy questions).

HUD Housing Counseling Program Potential Policy Changes - *This session would solicit feedback on some of the latest policy discussions with OHC staff.*

- Facilitator: Brian Siebenlist, Office Director, Office of Policy and Grant Administration

HUD Performance Reviews of Sub-Grantees *This session will cover HUD Performance Reviews of sub-grantees and hear from Oversight Agencies who have used these reviews to improve the quality of sub-grantees' counseling services as well as meeting their OA monitoring responsibilities.*

- Facilitator: Phyllis Ford, Division Director, Office of Oversight and Accountability

11:45pm – 12:45pm **Lunch on your own** - HUD is next to L'Enfant Plaza where there are plenty of eateries, but please allot 15 minutes to re-enter the building to ensure the 1pm session starts on time. One option attendees might want to attend during lunchtime is the following informal engagement which will start approximately at 12:15:

Discussion with State and Regional Collaboratives – There will informal meeting of state and regional collaboratives providing housing counseling services. This group will discuss lessons learned from organizing and delivering counseling services through collaboratives, sharing funding opportunities, identifying future needs and brainstorming better ways of working together.

Those that want to attend either meet up will be encouraged to grab lunch and return to HUD by 12:15pm to Auditorium A/B for Option 1 and Auditorium C for Option 2.

1:00pm – 2:00pm **HUD Housing Counseling Awareness and Visibility Campaign**

HUD's Office of Housing Counseling and Single Family Housing have partnered with Creative Marketing Resources (CMR) to implement an outreach initiative that rebrands HUD housing counseling as a positive tool for achieving a wide range of housing goals. This presentation will provide an overview of campaign efforts to date, answering the major questions of: What we learned? Why it matters? Where do we go from here?

- Facilitator: Jerrold Mayer, Office Director, Office of Outreach and Capacity Building
- Jacqueline Moore, President & CEO, Creative Marketing Resources
- Lauren Banks, Director of Account Services, Creative Marketing Resources
- David Bowles, Director of Research and Strategy, Creative Marketing Resources
- Andrew Klain, Manager of Public Relations and Outreach, Creative Marketing Resources

2:00pm – 3:00pm **Principles for Increased Financial Sustainability**

This session will cover basic principles for achieving greater financial sustainability for housing counseling services. After a short presentation, the session will highlight several agencies that have gained greater sustainability through service efficiencies, fee for service activities and other strategies. Ample time will be provided for Q&A.

- Facilitator: Doug Dylla, Doug Dylla Consulting
- Lyndsay Burns, Director, Housing Counseling Programs, Housing Partnership Network
- Susan Boss, Executive Director, The Housing Council at Pathstone Corporation
- David Young, Director, Technical Assistance, Housing Action Illinois

3:00 – 3:15pm **Break**

3:15pm- 4:15pm **Peer –to-Peer Breakouts**

After the break, the second set of peer-to-peer breakout sessions will be held. Attendees should choose which session appeals to them the most and join the discussion. Each breakout will have a facilitator who will lead the discussion on the topic to generate a list of lessons learned as well as suggested next steps for OHC (e.g., additional toolkits, training, and/or outstanding policy questions).

Using Technology in Housing Counseling – *This session would cover how oversight agencies are using a myriad of technology (remote, online, in-person) to provide housing counseling and educational services more effectively or efficiently.*

- Facilitator: Jerrold Mayer, Office Director, Office of Outreach and Capacity Building

OMB Requirements for Monitoring – *This session would cover best practices among oversight agencies on monitoring sub grantees, including the updated Office of Management and Budget (OMB) financial requirements, including indirect cost rate.*

- Facilitator: Robin Booth, Principal, Booth Management

4:15pm – 5:00pm **Closing Session - Auditorium A & B**

The conference will close with brief remarks from HUD including the importance of completing the online evaluation of the conference content/suggestions for the future, an update on ICF International's technical assistance for OHC, and summary reports from each of the facilitators of the peer-to-peer breakout sessions.

- Robin Penick, Housing Technical Specialist, Office of Housing Counseling, U.S. Department of Housing and Urban Development (HUD)
- Sarah Gerecke, Deputy Assistant Secretary, Office of Housing, U.S. Department of Housing and Urban Development (HUD)
- Shawna LaRue Moraille, Senior Technical Specialist, ICF