



Office of Housing Counseling (OHC)

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

Built to Last Built for Change

Educational and Networking Conference

Agenda – August 9, 2017

Conference Location: Auditorium A, B, & C, 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
- Obtaining feedback from oversight agencies on HUD's Housing Counseling Program
- Building on program successes and changing industry standards

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

9:00am – 9:15am **Opening Remarks from HUD – Auditorium A & B**

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 the importance of partnerships with conference participants, and review of the day's agenda.

- Robin Penick, Housing Technical Specialist and Jane Charida, Housing Program 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)
- Dana Wade, General Deputy Assistant Secretary, Office of Housing, U.S. Department of Housing and Urban Development, (HUD)

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

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 program outcomes and impacts, initiatives across the office, and external policy updates. 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)

- Brian Siebenlist, Office Director, Office of Policy and Grant Administration, U.S. Department of Housing and Urban Development, (HUD)
- Jerrold H. Mayer, Office Director, Office of Outreach and Capacity Building, U.S. Department of Housing and Urban Development, (HUD)
- Phyllis Ford, Division Director, Office of Oversight and Accountability, U.S. Department of Housing and Urban Development, (HUD)

10:30am – 10:45am **Break**

10:45am – 11:45am **Peer-to-Peer Breakouts – Auditorium A & B and Auditorium C**

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).

- *Sharing Needs on Client Management Systems (CMSs) (A&B): discuss oversight agencies needs for a virtual series on technology, platform, topics to cover, audience, etc.*
 - Facilitator: Jerrold Mayer, Office Director, Office of Outreach and Capacity Building, (HUD)
- *Limited English Proficiency (LEP) (C) – discuss needs from oversight agencies on identifying and serving LEP persons in their housing counseling programs.*
 - Facilitator: Shawna LaRue Moraille, Senior Technical Specialist, ICF

11:45am – 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 12:45pm session starts on time.

12:45pm – 1:45pm **Telling the Housing Counseling Story – Auditorium A & B**

Telling the Housing Counseling Story is a presentation on communicating the importance and value of housing counseling from two perspectives: a) HUD's Office of Policy Development and Research will describe what has been learned from the first phase of The First-Time Homebuyer Education and Counseling Demonstration and b) Creative Marketing Resources will provide insights from their work on Housing Counseling Awareness and Visibility.

- Facilitator: Sarah Gerecke, Deputy Assistant Secretary Office of Housing, U.S. Department of Housing and Urban Development, (HUD)
- Blair Russell, Social Science Analyst, Office of Policy Development and Research (PD&R), U.S. Department of Housing and Urban Development, (HUD)
- Jacqueline Moore, President & CEO and Lauren Banks, Director of Account Services, Creative Marketing Resources, Creative Marketing Resources

1:45pm – 2:00pm **Break**

2:00pm – 3:00pm **Billing Methodologies and Best Practices – Auditorium A & B**

Billing Methodologies and Best Practices is a presentation from Booth Management. The session will provide participants with tools they can take with them to help with billing methodologies and best practices.

- Facilitator: Phyllis Ford, Division Director, Office of Oversight and Accountability, U.S. Department of Housing and Urban Development, (HUD)
- Robin Booth, Principal, Booth Management

3:00pm – 3:15pm **Break**

3:15pm – 4:15pm **Peer-to-Peer Breakouts – Auditorium A & B and Auditorium C**

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).

- *Handbook changes/Rule making feedback session (A&B) – discuss up to three handbook changes*
 - Facilitator: Brian Siebenlist, Office Director, Office of Policy and Grant Administration, (HUD)
- *Network Capacity (C) – share lessons learned from an informal study conducted among OAs who are not planning to expand their networks and best practices for right-sizing networks.*
 - Facilitator: Jane Charida, Housing Technical Specialist, Office of Housing Counseling, U.S. Department of Housing and Urban Development, (HUD)

4:15pm – 4:30pm **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.

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