



**Office of Housing Counseling (OHC)**  
**HUD-Approved Intermediaries, State Housing Finance Agencies,**  
**& Multi-State Organizations**  
**Educational and Networking Conference**

*OPEN DOORS WITH HOUSING COUNSELING – AGENDA*

<b>Date</b> August 7 – 8, 2019	<b>Conference Goals</b> ✓ Hear what’s new from the Office of Housing Counseling (OHC) ✓ Network with colleagues from agencies across the nation ✓ Obtain feedback from HUD Intermediaries on HUD’s Housing Counseling Program ✓ Learn about technology options and data management for the future
<b>Location</b> Auditorium A, B, & C, U.S. Department of Housing and Urban Development (HUD), 451 7 <sup>th</sup> Street, S.W., Washington, D.C., 20410	

**Agenda at a Glance**

August 7, 2019		
8:00 – 9:00 AM	<b>Registration and Networking</b>	Outside Auditoriums
9:00 – 9:15 AM	<b>Opening Remarks from HUD</b>	Auditorium A & B
9:15 – 10:30 AM	<b>Plenary Session – Latest News out of Office of Housing Counseling</b>	Auditorium A & B
10:30 – 10:45 AM	<b>Break</b>	
10:45 – 11:45 AM	<b>Peer-to-Peer Breakouts</b> <i>Choose between HUD Intermediary Oversight and Monitoring (A&amp;B) and Housing Counselor Certification Linkages with Other HUD Partners (C)</i>	Auditorium A & B and Auditorium C
11:45 AM – 12:00 PM	<b>Newcomer’s Meet-Up</b>	Outside Auditoriums
11:45 AM – 1:00 PM	<b>Lunch on your own</b>	
1:15 – 2:15 PM	<b>Housing Counseling Grant Financial Reporting and Voucher Payment Processes</b>	Auditorium A & B
2:15 – 3:15 PM	<b>Using Social Media to Increase Awareness and Visibility of Housing Counseling</b>	Auditorium A & B
3:15 – 3:30 PM	<b>Break</b>	
3:30 – 4:30 PM	<b>Peer-to-Peer Breakouts</b> <i>Choose between HUD Intermediary Best Practices in Overseeing and Certifying their Network (A&amp;B) and HUD Form 9902 Data Visualization (C)</i>	Auditorium A & B and Auditorium C
4:30 – 5:00 PM	<b>Takeaways and Q and A</b>	Auditorium A & B
August 8, 2019		
8:00 – 9:00 AM	<b>CMS Vendor Set Up</b>	Auditorium C
9:00 – 9:15 AM	<b>Opening Remarks</b>	Auditorium A & B
9:15 – 10:15 AM	<b>Housing Counseling System (HCS) Today and in the Future</b>	Auditorium A & B
10:15 – 10:30 AM	<b>Break</b>	
10:30 – 11:20 AM	<b>CMS Vendor Updates</b>	Auditorium A & B
11:20 AM – 12:20 PM	<b>CMS Vendor Fair (morning through end of day)</b>	Auditorium C
12:20 – 12:30 PM	<b>Closing</b>	Auditorium A & B



## Agenda

August 7, 2019		
8:00 – 9:00 AM	<b>Registration and Networking</b>	Outside Auditoriums
9:00 – 9:15 AM	<p><b>Opening Remarks from HUD</b></p> <p><i>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.</i></p> <p><b>Facilitators:</b> Jane Charida and Javon Blye, Housing Program Specialists, Office of Housing Counseling, HUD</p> <p><b>Speakers:</b> Sarah Gerecke, Deputy Assistant Secretary, Office of Housing Counseling, HUD, and Brian Montgomery, Acting Deputy Secretary for HUD and Assistant Secretary for Housing – Federal Housing Commissioner</p>	Auditorium A & B
9:15 – 10:30 AM	<p><b>Plenary Session – Latest News out of Office of Housing Counseling</b></p> <p><i>The conference continues with Latest News out of Housing Counseling including updates on the office from the Deputy Assistant Secretary as well as FY 2019 accomplishments and FY 2020 goals from the Offices of Policy and Grant Administration, Outreach and Capacity Building, and Oversight and Accountability. Finally, there will be time to discuss the latest on the Certification, HUD Handbook 7610.1 and Uniform Guidance requirements directly from the Deputy Assistant Secretary. There will be time at the end for Questions and Answers (Q and A).</i></p> <p><b>Facilitator:</b> Sarah Gerecke, Deputy Assistant Secretary, Office of Housing Counseling, HUD</p> <p><b>Speakers:</b> Brian Siebenlist, Director, Office of Policy and Grant Administration; Jerrold H. Mayer, Director, Office of Outreach and Capacity Building; and Phyllis Ford, Division Director, Office of Oversight and Accountability, HUD</p>	Auditorium A & B
10:30 – 10:45 AM	<b>Break</b>	



**August 7, 2019**

10:45 – 11:45 AM	<p><b>Peer-to-Peer Breakouts</b></p> <p><i>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).</i></p>	Auditorium A & B and Auditorium C
<p><b>HUD Intermediary Oversight and Monitoring of their Network (A&amp;B)</b></p> <p><i>This session involves a discussion of how HUD Intermediaries are overseeing and monitoring their network to assess and determine areas of risk and mitigation best practices.</i></p> <p><b>Facilitators:</b> Phyllis Ford, Division Director, Office of Oversight and Accountability, HUD and Rachael Laurilliard, Community Development Specialist, ICF</p>	<p><b>The Housing Counselor Certification Linkages with other HUD Partners (C)</b></p> <p><i>This session will include a discussion on mining best practices from intermediaries who have made linkages with covered HUD programs, specifically working in CPD and PIH programs.</i></p> <p><b>Facilitators:</b> Shawna LaRue Moraille, Principal, ICF and Lorraine Griscavage-Frisbee, Deputy Director of Office Outreach and Capacity Building, HUD</p>	
11:45 AM – 12:00 PM	<p><b>Newcomer’s Meet-Up</b></p> <p><i>Is this your first OHC HUD Intermediary Conference? If yes, please meet up across from the registration table.</i></p>	Outside Auditorium A & B
11:45 AM – 1:00 PM	<p><b>Lunch on your own</b></p> <p>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 1:15 PM session starts on time.</p>	
1:15 – 2:15 PM	<p><b>Housing Counseling Grant Financial Reporting and Voucher Payment Processes</b></p> <p><i>This session is an overview of the housing counseling grant financial reporting and voucher payment processes and will cover questions and answers in the areas of financial reporting &amp; budget compliance, grant drawdowns, recordkeeping and agency post-grant monitoring to ensure grantees compliance with the process.</i></p> <p><b>Facilitator:</b> Brian Siebenlist, Director, Office of Policy and Grant Administration, HUD  <b>Speakers:</b> Adrenace Williams, David Valdez, and Rebecca Maclean, Housing Program Specialists, Office of Housing Counseling, HUD</p>	Auditorium A & B



**August 7, 2019**

2:15 – 3:15 PM	<p><b>Using Social Media to Increase Awareness and Visibility of Housing Counseling</b></p> <p><i>This presentation will help intermediaries understand how they can tap into the many resources provided by the Office of Housing Counseling to increase awareness, change perceptions and ultimately encourage consumers to engage in HUD housing counseling. Attendees will learn about new communication materials, the benefits of various digital platforms and how housing counseling agencies can take their online presence to the next level.</i></p> <p><b>Facilitator:</b> Terry Carr, Senior Management Analyst, Office of Housing Counseling, HUD  <b>Speakers:</b> Lauren Banks, Director of Account Services, CMR, and Jennifer Murphy, Executive Director, HomeSmartNY</p>	Auditorium A & B
3:15 – 3:30 PM	<b>Break</b>	
3:30 – 4:30 PM	<p><b>Peer-to-Peer Breakouts</b></p> <p><i>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).</i></p>	Auditorium A & B and Auditorium C
<p><b>HUD Intermediary Best Practices in Overseeing and Certifying Their Network (A&amp;B)</b></p> <p><i>This session will include a discussion on mining best practices and what HUD Intermediaries are doing to oversee and encourage their network of housing counselors to become certified.</i></p> <p><b>Facilitators:</b> Robin Penick, Housing Program Specialist, and Lorraine Griscavage-Frisbee, Deputy Director of Office Outreach and Capacity Building, Office of Housing Counseling, HUD</p>	<p><b>HUD Form 9902 Data Visualization (C)</b></p> <p><i>This session will solicit feedback from HUD Intermediaries on OHC's data visualization project.</i></p> <p><b>Facilitators:</b> Kristin Ackerman and Melissa Noe, Housing Program Specialists, Office of Policy and Grant Administration, HUD</p>	
4:30 – 5:00 PM	<p><b>Takeaways and Q and A</b></p> <p><i>The conference day will close with brief remarks from HUD including the importance of completing the evaluation of the conference content for this day and a final Q and A.</i></p> <p><b>Speaker:</b> Sarah Gerecke, Deputy Assistant Secretary, Office of Housing Counseling, HUD</p>	Auditorium A & B



August 8, 2019		
8:00 – 9:00 AM	<b>CMS Vendor Set Up</b>	Auditorium C
9:00 – 9:15 AM	<p><b>Opening Remarks</b>  <i>The conference will continue with a brief welcome and an orientation to today's agenda.</i></p> <p><b>Speakers:</b> Jerrold H. Mayer, Director, Office of Outreach and Capacity Building, HUD and David Young, Director of Capacity Building, Housing Action Illinois</p>	Auditorium A & B
9:15 – 10:15 AM	<p><b>Housing Counseling System (HCS) Today and in the Future</b></p> <p><i>This session will cover HUD's Housing Counseling System (HCS) latest updates, common questions/answers and troubleshooting techniques, particularly in the areas of: user compliance, agency service area, and intermediary-level 9902 reporting. This session will also describe the future of HCS enhancements, including the migration to Housing Counseling Agency Management System (HCAMS).</i></p> <p><b>Facilitators:</b> Joel Ibañez, Housing Program Specialist, HUD  <b>Speakers:</b> George Grotheer, Senior Management Information Specialist, Office of Housing Counseling, HUD; Teresa Houck, Project Manager, Salient; and Kristin Ackerman, Housing Program Specialist, Office of Policy and Grant Administration, HUD</p>	Auditorium A & B
10:15 – 10:30 AM	<b>Break</b>	
10:30 – 11:20 AM	<p><b>CMS Vendor Updates</b></p> <p><i>Hear updates from NACA-Lynx, Counselor Max, Launchpad, and HomeKeeper.</i></p> <p><b>Facilitator:</b> Jerrold H. Mayer, Director, Office of Outreach and Capacity Building, HUD  <b>Speakers:</b> Bruce Marks, CEO, NACA; Donna Tally, Senior Director, Sustainable Business Initiative and Salesforce Customer Success, NeighborWorks America; Paul Downing, Vice President, Information System and Operations, HPN; and Tiffany Eng, Director of Homekeeper, Grounded Solutions</p>	Auditorium A & B



## August 8, 2019

11:20 AM – 12:20 PM	<b>CMS Vendor Fair</b> ( <i>morning through end of day</i> )  <i>HUD Intermediaries can spend time with HUD-Approved publicly available CMS vendors specifically during this hour. CMS vendors may also be available during the other sessions, beginning at 9am through the end of the day.</i>	Auditorium C
12:20 – 12:30 PM	<b>Closing</b>  <i>The conference will conclude with brief remarks from HUD including the importance of completing the online evaluation of the conference for this day as well as suggestions for the future.</i>  <b>Speakers:</b> Sarah Gerecke, Deputy Assistant Secretary, Office of Housing Counseling and Jerrold H. Mayer, Director, Office of Outreach and Capacity Building, HUD	Auditorium A & B