



OFFICE OF  
HOUSING COUNSELING

# Takeaways & Q and A

*"Open Doors with Housing Counseling"*

**August 07, 2019**

# Final Peer to Peer Takeaways: HUD Intermediary Oversight and Monitoring of their Network

- Shared best practices and other recommendations for the following topics:
  - Performance Reviews: *provide checklists to aid in the review process, conduct a self review before HUD review, include the agency's finance department in the review process*
  - Monitoring and Billing Methodology: *go to HUD POC with questions, ensure mutual understanding of compliance*
  - Conflict of Interest (COI) and Vetting Staff: *monitor news alerts and google for COI/fraud concerns, everyone should be filling out COI forms, ask subs about their internal processes*
  - Monitoring Certification: *conduct webinars, online study groups, send out monthly reminders*
  - Tools/ Resources Needed: *grant tracking tool, work plan template, more information on risk assessments*

# Final Peer to Peer Takeaways: The Housing Counselor Certification Linkages with other HUD Partners

- Shared best practices and other recommendations for the following topics:
  - Develop joint messages across HUD programs
  - Decision flow chart
    - Understanding next steps when there isn't an example to follow
      - Outreach to field offices, give tools that paint a picture of housing counseling, build relationships with PHA's
  - Partner identification tool would be helpful
  - Sample contract
  - Examples of partnerships that exist and the ties that bring the programs together
    - Understanding the cross-section of programs to benefit all parties involved
      - HOME, CDBG, and Emergency Shelter Grant (ESG)
        - Certified counselors provide families with a skilled professional that can help address housing needs and goals
        - Counseling agencies are skilled at limited English proficiency (LEP), working with the underserved, etc.

# Final Peer to Peer Takeaways : HUD Intermediary Best Practices in Overseeing and Certifying Their Network

- Shared best practices and other recommendations for the following topics:
  - Schedule exam and then complete training
  - Make certification a requirement earlier than HUD deadline
  - Use HUD tools, such as the Knowledge Assessment tool and practice exam
  - Study tips: virtual study groups, schedule exam before a training, study groups that focus on sections of the exam
  - Incentives: gift cards, reimbursement of exam cost, time to study on the job
  - Resources/ tools: webinars, shared online flashcards

# Final Peer to Peer Takeaways: HUD Form 9902 Data Visualization

- Shared best practices and other recommendations for the following topics:
  - Data sections to be displayed:
    - The more information that the visualizations can show, the more helpful it will be to agencies
    - State report by reporting period for Section 8 and 9
  - Visualizing data allows individuals the opportunity to:
    - See the impact of the data, which can be leveraged in grant writing and used to understand outcomes (projections vs. actuals)
    - Use the visual of the overall impact of housing counseling efforts for goal setting and understanding areas with shortcomings to justify funding and priorities for the next Fiscal Year
    - Better tell the story of Housing Counseling

# Closing Remarks

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

# Day 1 Takeaways & Evaluation

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

Thank you for your participation!

**Time for  
Mentimeter!**

