



# HUD Office of Housing Counseling

## Agency Eligibility Tool:

Assistance to determine if your agency is ready  
to apply to the HUD Housing Counseling  
Program

**Audio is available only by conference call**

Please call: (866) 615-1886 Access Code: 416450

to join the conference call portion of the webinar

# Webinar Logistics

- Audio is being recorded. The playback number along with the PowerPoint and a transcript will be available on the HUD Exchange at [www.hudexchange.info/programs/housing-counseling/webinars/](http://www.hudexchange.info/programs/housing-counseling/webinars/)
- An OHC LISTSERV will be sent out when the Archives are posted. Posting will usually be within 7-10 days.
- Attendee lines will muted during presentation.
- Handouts were sent out prior to webinar. They are also available in the Control Panel. Just click on document name to download.

# Questions & Comments



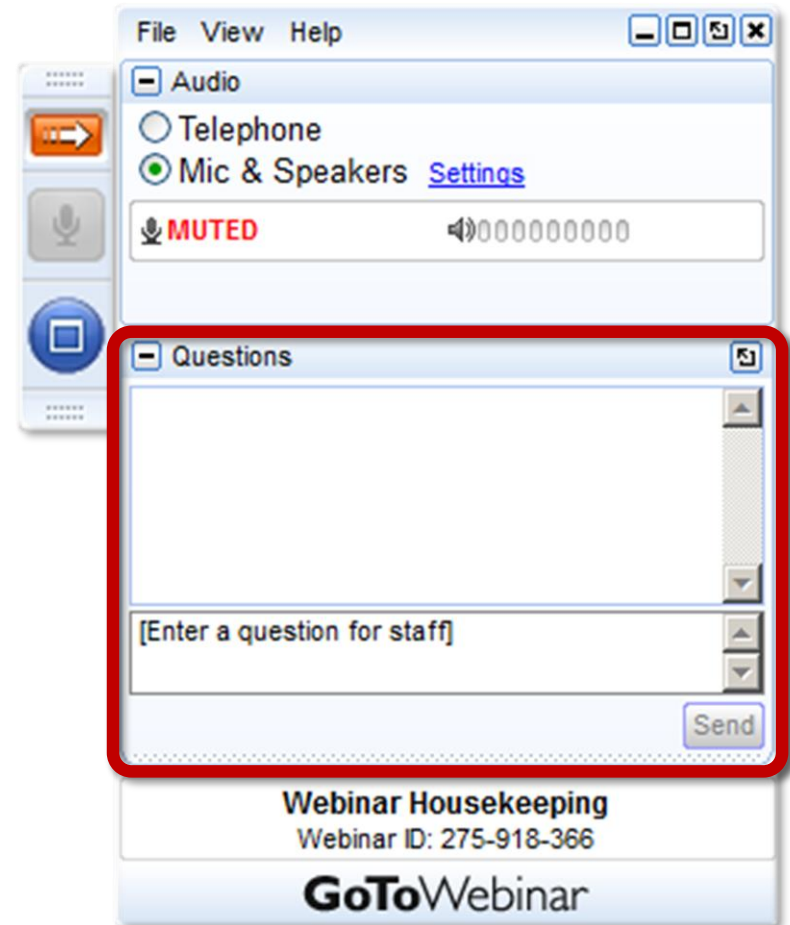
- There will be Polling Questions. Please respond to them
- There will be a Q&A period at the end.
  - The operator will give you instructions on how to ask questions or make your comments.
  - If unmuted during Q&A, please do not use a speaker phone

# Other Ways to Ask Questions

## Your Participation

Please submit your text questions and comments using the Questions Panel. We will answer some of them during the webinar.

You can also send questions and comments to [housing.counseling@hud.gov](mailto:housing.counseling@hud.gov) with **Eligibility Tool** in the subject line





# Please Mute Your Phones During Discussions

- During the discussions, all the phones may be unmuted by the operator.
- It is critical that you mute your phone during these discussions.
  - Most phones have a Mute function so please use it.
  - \*6 will also mute and unmute your phone.

# Brief Survey

- Please complete the brief survey at the end of this session.
- Your responses will help OHC better plan and present our webinars.



# Certificate of Training

- If you logged into the webinar, you will receive a “thank you for attending” email from GoToWebinar within 48 hours.
- The email will say “***This is your CERTIFICATE OF TRAINING***”. There is no attachment
- Print out and save that email for your records.

Thank you for attending our XX hour Webinar on XX. We hope you enjoyed our event. This is your CERTIFICATE OF TRAINING. Please print out and save this email for your records. Please send your questions, comments and feedback to: [housing.counseling@hud.gov](mailto:housing.counseling@hud.gov).

# Lorraine Griscavage- Frisbee

Office of Outreach and  
Capacity Building



# Presenters and Q&A Format

- Presenters
  - **Esther Richardson**, Office of Outreach and Capacity Building, HUD
  - **Shawna LaRue Moraille**, ICF
- Written Questions – supported by **Esther Richardson**, Office of Outreach and Capacity Building, HUD

# Polling Question

Please identify the agency you represent:

- Agency considering application to HUD's Counseling program
- Intermediary, State Housing Finance Agency, or Multi State Organization
- Locally approved agency
- Affiliate (not locally approved)
- Other

# Agenda

- Participants will learn:
  - What is the background and purpose Housing Counseling Agency Eligibility Tool
  - How to set up and edit a user account on the HUD Exchange
  - How to navigate the Housing Counseling Agency Eligibility Tool

# Esther Richardson

## Office of Outreach and Capacity Building

# Background on the Housing Counseling Agency Eligibility Tool

- Developed as a companion piece to the New Certification Rule
- Used by both prospective local housing counseling agencies as well as new affiliates and subgrantees of oversight agencies
- Developed to streamline new applications reviews

# What is Purpose of the Housing Counseling Agency Eligibility Tool?

- Online tool for prospective housing counseling agencies:
  - Walks potential agencies through the required criteria for HUD-approval
  - Includes educational materials on becoming HUD-Approved
  - Provides an agency with a user report to follow up on next steps
  - Reduces time and increases productivity

# Oversight Agencies

- Tool may be incorporated in the process for new affiliate applications
- Walks potential agencies through the required criteria to participate in the HUD program
- Tool does not replace a formal application review by the Oversight agency

# Polling Question

For agencies that oversee a network of organizations, how does your agency currently review new applicants?

- Applicants are sent to HUD for approval with no preliminary checks
- Agency conducts a limited background search on the agency before sending them to HUD
- Agency does not check applicant's background
- Other



# Shawna LaRue Moraille

ICF

# Demonstration of Housing Counseling Agency Eligibility Tool

# Housing Counseling Agency Eligibility Tool – Getting Started

- Tool Landing Page
  - <https://www.hudexchange.info/programs/housing-counseling/housing-counseling-agency-eligibility-tool/>
  - Accessible from the “How to Become a HUD Approved Housing Counseling Agency” Page

# Housing Counseling Agency Eligibility Tool – Supplemental Materials

- Definitions  
<https://www.hudexchange.info/resources/documents/Housing-Counseling-Organization-Definitions.pdf>
- Tool at a glance  
<https://www.hudexchange.info/onecpd/assets/File/At-A-Glance-Housing-Counseling-Agency-Eligibility-Tool.pdf>
- HUD Approval Process  
<https://www.hudexchange.info/resources/documents/HUD-Approval-Process-Overview.pdf>
- Other materials (e.g., FAQs, HUD-Approval page, handbook, etc.)

# HUD Exchange User Accounts

- Eligible Organization Type – Nonprofits and Government Entities
- Ineligible Organization Types – HUD, Other Federal Agencies, For profits, and Individuals

# How to Set Up and Update a HUD Exchange Account

- Setting up an account allows:
  - Access the Housing Counseling Agency Eligibility Tool
  - Register for HUD training
  - Access online training
  - View trainings you've enrolled in or completed
- Updating is easy:
  - Log In
  - Click 'Update My Account'
  - Under Organization, select Update

# Housing Counseling Agency Eligibility Tool - Cases

- Case 1 – Nonprofit Entity: Community Housing Development Organization (CHDO)
  - Provides pre-purchase housing counseling as part of a homebuyer program
  - Does not have a work plan developed yet for housing counseling
  - Changes have occurred within the service area, expanding area in which counseling is provided
  - Does not have a Client Management System (CMS)

# Housing Counseling Agency Eligibility Tool - Cases

- Case 2 – Non Profit Entity – Rural County
  - Provides rental housing counseling, pre-purchase counseling and homebuyer education as part of the agency work plan
  - Demonstrates delivery of housing counseling over the past fifteen months
  - Counseling staff has a combined average of 10 years experience



# Supplemental Materials and Wrap Up

# Polling Question

Do you think you will use this tool?

- Yes
- No
- I don't know

# Polling Question

For those considering applying, when do you plan to complete this tool?

- the next 30 days
- the next 90 days
- the next 6 months
- Unsure if we will apply

# Wrap Up

- Thank you for attending!
- Final questions on the Housing Counseling Agency Eligibility Tool?
  - For technical issues with the tool, contact [info@hudexchange.info](mailto:info@hudexchange.info)
  - For questions about agency eligibility and requirements, contact [housing.counseling@hud.gov](mailto:housing.counseling@hud.gov)



# Discussion Lorraine

