



Closing Session

August 5, 2015

Speakers

- Ruth Roman, Senior Policy Advisor, Office of Housing Counseling
- Sarah Gerecke, Deputy Assistant Secretary, Office of Housing Counseling
- Doug Dylla, Doug Dylla Consulting, subcontractor to ICF International

Closing Agenda

- Q and A
- Peer-to-Peer Breakout Summaries
- Meeting evaluation

Q and A

Peer-to-Peer Breakout Summaries

- #1: Achieving Greater Sustainability for Housing Counseling
- #2: Improving Outcome Measure Data Reporting in the 9902 Form
- #3: Network Monitoring/Quality Control
- #4: Raising the visibility of Housing Counseling

Achieving Greater Sustainability for Housing Counseling

- Lessons Learned:
 - Demand for high-quality counseling is growing (e.g., rental and student debt counseling) and need to find new partners/fees to support efforts
 - Cost analysis work is important and necessary
 - Opportunities for driving down counseling costs through better use of technology and reduce compliance burdens
 - Big challenge of data security and privacy concerns

Achieving Greater Sustainability for Housing Counseling

- Next Steps - Wish List:
 - Require MI companies to use HUD-approved counseling agencies to deliver counseling services
 - Begin a sustained effort by HUD to reduce compliance costs for receiving HC funding
 - Work with industry partners to implement a rebranding effort promoting the value of counseling to millennials and other customers
 - Synch CFPB rules with HUD on RESPA issues

Improving Outcome Measure Data Reporting in the 9902 Form

- Lessons Learned:
 - Identify specific business roles for agency's counseling activities (i.e., with a defined set of outcomes in more user-friendly language)
 - Provide training for staff on key business model outcomes – including multiple outcome measures
 - Use performance reviews with affiliates to identify and fine-tune new outcome measures

Improving Outcome Measure Data Reporting in the 9902 Form

- Next Steps:
 - Improve instructions and training for using the 9902 (e.g., develop a “step-in” package for oversight agencies)
 - Define more thoroughly the outcome criteria
 - Provide some *optional* “preset” outcomes by type of counseling services
 - *Caution:* HUD needs to keep in mind CMS differences among agencies

Network Monitoring/Quality Control

- Challenges:
 - Increasingly heavy time and resource considerations for oversight agency (OA) functions
 - Lag time between the service delivery and funding causing challenges for OAs and HCAs
 - Clarify and simplify the network monitoring process that is becoming burdensome and costly

Network Monitoring/Quality Control

- Next Steps:
 - Create a streamlined reporting process
 - Coordinate the billing and reporting processes and due dates on grant
 - Clarification of HUD vs. oversight agency roles, especially with regard to LHCA's

Raising the Visibility of Housing Counseling

- Lessons Learned:
 - Use Ad grants from Google
 - Integrate counseling into purchase process
 - Rebrand with different vocabulary and tied to certification
 - “Tell the story” of how housing counseling works

Raising the Visibility of Housing Counseling

- Next Steps:
 - Reinforce the message that HUD-Approved counselors are the “Gold Standard”
 - Provide clear guidance for the use of HUD funds for marketing
 - Flexibility in performance reviews for rebranding efforts (e.g., “advisors” vs. “counselors”)
 - More public leadership (message and policy) on the importance and benefits of counseling
 - Work with FHA to integrate counseling into process

Meeting Evaluation

- In the meeting folders; however, we strongly recommend you use the link:
 - <https://www.surveymonkey.com/r/Y7V73GG>
- Feedback on the meeting is very important for further improvements in the future
- Thank you for your participation!