

Office of Housing Counseling

2022 Community Conference

Championing the Resilience of Housing Counseling Agencies

Sid Alvarado: Hello, everyone. And welcome to "Championing the Resilience of Housing Counseling Agencies." My name is Sid Alvarado with ICF, the technical assistance provider to HUD's Office of Housing Counseling. I will be your moderator today for this session.

We know that many of you are already experts in using Zoom; however, we always want to take time to let you know how we're going to be using Zoom in each of our session. So for this session, you can submit any technical issues that you have via the chat box. You can send those messages and we will make sure that if you are having any technical difficulties or issues, we address those in the chat box. However, when it comes to any questions that you have, we ask that you use the Q&A box to send in any related questions that you have to what we're going to be speaking about today.

For materials, we want to let you know that the materials has been posted for this session, and we'll make sure that we also place that link into the chat box so that you'll have it. Webinar materials are posted on the HUD Exchange in the Webinar Archive, between 7-14 days after the live session. And you can find that by either looking at the date or the topic.

For Certificate of Attendance, after the conference is over, you'll have the opportunity to log into your account via the Learning Transcript, select the course name, and then click the Print Certificate.

So today I am going to be one of your speakers. As I said, my name is Sid Alvarado. I am with ICF, the lead housing counseling specialist. We also have Marcia Lewis, who is the interim executive director with the Indianapolis Housing Agency. In addition, we have Barbara Busch, who is the executive director for Working in Neighborhoods.

During this time, we are going to talk about a few topics. We are going to talk about diversification and how that is an essential element when it comes to growing as well as sustaining organizations.

We'll also talk about how transition within an organization, it not only presents challenges, but more importantly, an opportunity to set goals for improvement within that organization.

We are going to also highlight an exciting template that we have, the Succession Planning Template Guide, that can help agencies prepare for transition as well as reduce down time and identify opportunities for internal recruitment.

There will also be an opportunity for us to do Q&A. We are going to take some time at the end of the presentations to do Q&A.

However, we want to make sure that you know that you can actually send in those questions at any time while they're top of mind, and then as time allows at the end of the presentation, I'm going to invite my colleague, Karen Hoskins, who is going to help me to answer some of those questions or present some of those questions to the speakers during the time after presentation.

And then resources, as always, at the end of the presentation, we have some links for you to connect to additional resources.

Now that I've set the stage, we're going to get into our presentation by starting with Barbara Busch. Barbara is the executive director of Working in Neighborhoods. She'll begin with providing an overview of the organization as well as the communities in which they serve. Barbara?

Barbara Busch: Sure. So the exciting part about being a local housing counseling agency and community organization, is that we get to know our people very well. And so you'll see that we serve various numbers group or groups of people. For our community building, we serve 10 neighborhoods.

For our housing development, we serve four neighborhoods. For our housing counseling, however, we serve 11 counties across southwest Iowa, northern Kentucky, and southeastern Indiana.

We're right there on the border. I don't know what you know about Cincinnati, Ohio, but we're bordered by three states and the Ohio River. So if you ever want to take a ferry, you can come across the Ohio River.

You know, as you can gather through our Covid time, we really had to learn to pivot. So in our housing counseling particularly, we moved into virtual sessions, we moved into making smaller housing in-person, we did a lot more phone.

So part of being diversified and being able to do these things, is our ability to do two things that I think are extremely important. One is to keep our staff diversified so that they are able to do all the things that we need done at various times. Because at various times, there's always more work in one area than another. Even though we have some people who specialized, we are happy that for all of our staff, they're cross-trained.

So the three services that we provide is community building. WIN does a lot of work in our neighborhoods to help them make decisions about how to improve the quality of life for themselves, their families, and their community.

We do, as I talked before about financial literacy and homebuyer training, and we do foreclosure prevention, which we're hoping we won't have much of this year.

The other thing we do is we build and rehab for homes, new homes throughout the neighborhood. And we've actually done that for seven -- we could move to the next slide -- for 170 families.

The other thing that's become new in this era is that there is such a need for apartments, decent apartments, affordable apartments. So we built a 18-unit senior HUD-202.

We partnered with National Church Residences to do 80 units of permanent supportive housing in our neighborhood. And we actually worked with American Community Developers to do Shelton Gardens, which is 138 units. That totals 236 families that we've affected through our housing counseling and our home ownership. You can move on. Thank you. Next slide.

The other important things that we do, and I think are the challenging things for our agency, is during the recession, one of the things that happened -- move the slides are can't -- anyway, one of the interesting things that happened, is we lost a number of housing counseling agencies in the area. And that presented a challenge for us, because then we needed to pick up those agencies' customers.

And so how do you -- how in times of recession, is it that you can add staff to do the things that you need to do. And that's why we believe diversifying our funding streams are extraordinarily important.

If you don't have multiple funding streams, you have difficulty staying in existence, and especially for a smaller local agency like ourselves. You know, we needed diversifying -- we need to have diversity in our services and diversity in our funding stream.

So we are Chowdo [ph] and we do, do home money also for our down payment -- for the city's down payment assistance program, because we are in fact, one of the housing counseling agencies for that. As you can imagine, we have these rental housing units, and so we're doing services and financial services to help do people do better in those arenas also. So we can move to the next slide.

And the other thing that I think is extraordinarily important, is that -- the next slide, please -- the other thing that I think is important, is the need to advocate. We are really big on the idea that we want to advocate for the type of housing that families need. We want to advocate for the kind of loan modifications that families need.

So we don't want to be just doing individual counseling but we want to be looking the bigger questions. How do we make sure that there's apartments rent? How do we make sure that there are homes to buy?

So there's all those kinds of things are, I believe, very important to an organization that's local and is moving forward with our community in mind. So we started a partnership this year, and this is one of our examples of diversification.

We knew that in our area we are losing families -- single-family housing to out of town investors. And so we began to ask the question: How do we get those single-family units back in the hands of homeownership?

Because it improves our neighborhoods and because it provides opportunities for the families we do counseling with. So the Land Bank, our local Land Bank, actually was about to through a bankruptcy court, to buy 190 single-family homes that were owned by an out of town investor who was renting them.

So we have a contract now with the Land Bank to provide those current residents and renters, the opportunity to buy their own home.

So that was a very exciting thought for us and for the poor -- for the Land Bank because if we could change these 194 units back into single-family, this would be a model, one of the example of something that could be done in the future. But of course, it means that you need to increase your staffing needs.

And so, that again, is why you want to be prepared to get money from varieties of sources. And so we actually at this point, have about five different groups that are funding the project that we're doing on our single-family -- moving up these families into homeownership. So we can move on.

So our long-term benefit is that we're still here. And that's something that we feel is extraordinarily in the long run. So you have to be thinking about all these things for that to happen.

And so I just wanted to show you a little bit about what we're doing in our financial stability program, which is what we are calling the program for the Land Bank.

So we are very client-focused. And at the foundation, we are really hoping that these families will have the opportunity and the desire to own their own home. We'll of course, work with them to find a better place to live if they don't want to buy a home. But we believe that for a lot of people, they've just never thought about owning.

So that's a process that we'll be working with them on, over the next 12 to 24 months. Our organization has always been focused helping the individual family to make their own goals. Because for us, having goals for family is pre- -- usually doesn't work.

So we really work hard at figuring out what those families want to do and how then we can help them build a way to get there. We feel like this is the way we can do a lot of work toward long-term racial wealth.

And for us, the importance of all of this work, is that we continue to work with our neighbors, with our customers, with all kinds of organizations, to make a better life for our community and to improve the quality of life in greater Cincinnati. Thank you, and Sid, you're on.

Sid Alvarado: Thank you so much, Barbara. It was great to hear how with your leadership, WIN is able to really kind of focus on not only organizational diversification from an organizational standpoint but also from a staff standpoint. And you all have done some great work. Really excited about hearing the work that you've done.

Now we're going to turn it over to Marcia Lewis. She is being recently referred to as Organization Rebuilder, and rightfully so. And you'll hear about that in just a moment. She'll give us an overview that highlight her expertise, as well as some nuggets for agencies that may

find themselves in the process of transition and rebuilding. I'm going to hand it over to you now, Marcia.

Marcia Lewis: Thank you, Sid. Well, it's a pleasure to be here today to talk about something that I think is really important, and that is resiliency. What I have the, I don't know whether pleasure is the right word, but something based on my experience, has been dealing with change.

And I'd like to say there is nothing constant but change. I've spent a long time doing this work. I've worked with housing authorities. Additionally, I've worked with the federal government. I've worked for HUD and retired from HUD as well.

And it seems that many of the places that I worked with, are organizations in transition. It has helped me to shape experience in policy, budgeting, strategic planning, and learning how to work across lines that both internally and externally, public and private, and really engage people in doing this work. Next slide.

The Indianapolis Housing Agency -- many places you understand there are housing authorities. Indianapolis housing is a housing authority. It is in Indianapolis, serving Marion County. We have about 85 employees now. We do a lot of things other than just what people think of as the traditional programs.

And part of our interaction with housing counseling comes from having a family self-sufficiency program and a homeownership program attached to our other programs.

We do mortgage delinquency, default resolution counseling, pre-purchase counseling, education workshops, financial managing and budgeting fair housing. We work with the homeless population quite a bit. We work with our continuum of care, and we really want to create a continuum of housing, going from homelessness to homeownership.

We do rental workshops. A lot that has come from the pandemic, like many of you, we had to learn how to do a lot of counseling for renters to avoid eviction and non-delinquency post-purchase counseling. A lot is happening in these settings these days. Thank you. Next slide.

So I want to start by just talking a little bit about community engagement. And community is defined for me by not only those who are external to your organization, but those who are internal to your organization.

I think a lot of times, people are afraid to speak their truths. They're afraid to talk about the deficiencies or the fails, or the setbacks. And trying to revive an organization and trying to stay current, and trying to move forward, we have to be able to engage others who might be able to support our goals.

A lot of times, people don't know to support your goals, because they don't understand your business. And so one of the first things that I attempt to do with organizations, is to help other people understand the value of and what the organization does.

Another thing that in community engagement, oftentimes as we're trying to rebuild an organization, there is a lot of change management that is going to occur. And we all fear change. I talk about this, I do this work, but I don't like it. I'm no different than a lot of other people.

Change is a very uncomfortable place to be, but I try to work with my organization and other organizations I've worked with, to package it and deliver it in inclusive and in non-threatening ways.

I think that it's important that everyone have some voice and that those voices are listened to. One of the things that I have created recently in working with Indianapolis Housing is what I call a moving forward transition plan. This is an attempt to inform stakeholders in real time about what is happening and open the doors for partnerships and support.

When people don't know what's happening, people come up with their own stories. They come up with their own ideas about what it is that is going on or what the business is or what the business is not.

And it also sometimes without knowing, doors become closed to partnership and support because of that. In doing so, we have to understand who our stakeholders are and who benefits from -- and who needs our services. Again, it's about continuous transparency. Next slide.

One of the first things that I like to do -- a lot of people like to go in and make change across the board when they are trying to redo things or to make their mark, or to -- when they come into an organization, they try to do things right off the bat. I believe that there should be a look and see approach.

I believe it's important to understand what is happening, what is the performance, what is going on there and to kind of give time for people to understand change styles, ask questions, share information. I've learned a lot about listening. I've learned a lot about being quiet and allowing people to talk, because people share a lot when they don't feel threatened. And then, beginning to set goals, goals for improvement.

I always like to look at low-hanging fruit first, for a lack of a better term, in order to have some quick wins, because that's encouraging. When people are in an environment and they're going through so many changes like all that we've gone through during these past two years, people feel frustrated, they feel overwhelmed, they feel unsuccessful, they feel unrewarded.

And sometimes they need to see somethings happen and some positives, so that they remember there are positives. I also feel it's important that we look at timelines. You know, I am -- I've learned really hard lessons about trying to wing it. And so establishing timelines and determining who are the best people to help make the things happen that you're attempting to do, is very important.

Everyone doesn't always have the title that they're best suited to do the work for. If that make sense; identifying deliverables, developing evaluation methods. If you don't evaluate what you're doing and things are not moving in the direction they need to, sometimes you don't know that

you need to stop. Sometimes you don't know that you need to reset. Sometimes you don't know that you need to change.

And then I think it's very important, that's another part of the plan. On a monthly basis, I share information about what it is that we're trying to do and how we're doing. Those successes, being honest about the fails, have really opened doors that have been closed for some time to the agency.

People are coming to me now, saying thank you, thank you for sharing, thank you for being transparent, thank you for working, thank you for doing the hard work. And that's encouraging. It's encouraging for me. And I can pass that same encouragement along to the team who are performing the task. The next slide.

So what guides your agency? What is it that allows you to move forward? Do you have a strategic plan? Do you have a company organizational manual? Do you have -- is it regulatory? Is it purely something that has been arrived by perhaps grassroots development? What guides your agency? And how do you make the hard decisions? Do you look at the current condition? Do you have vision for the future?

I am always trying to think about what might be the next step, what might be the next goal. And a lot of times, I think that I've got a great idea, and then someone comes to me and presents one to me that's even better. So how do you make heart decisions?

The reason I call them heart decisions, is because a lot of times moving forward might involve change that impacts people in ways they may feel as negative.

The organization that I am dealing with today is in transition in great deal, due to its financial condition. I'm having to make very difficult decisions that are for the best of our clients and allowing us to serve our clients, who are households that either receive vouchers or who are in our programs, or who are in our low-rent public housing programs, our multi-family housing programs.

In doing those and making those hard decisions, some of those may affect people who work at the organization. And then, can you ask the questions? Are you strong enough to ask people for feedback? How we're doing? What can we do to change?

I have developed and we are working on a series of townhall meetings at our properties. Because a lot of the people who live in our properties and who participate in our programs, haven't been communicated with in person or in some direct manner for two years.

And so we need to reengage. And part of that is to talk to them about what can we do better. So the plan we have, it focuses on key changes and being able to implement those to improve the condition. I believe in continuous improvement. I believe in continuous learning. Those two go hand in hand together, learning how to sustain things.

And then sometimes having to think about doing things that have not been the normal path your agency has taken in the past. Barbara shared a moment ago about some of the things that they had to do differently. And some of the things we're looking at are whether we are best suited to be managers of commercial property. I don't feel we are.

And in doing so, we don't have the resources, and it takes away from the resources for doing the basic and the primary work that we are funded to do. So we're going to divest ourselves of commercial property and focus on our residential property, our affordable housing.

We are going to look at reorganizing. We're going to look at trying to obtain revenue to sustain our operations. All of the hard things that all of us are doing right now, are part of the process. Next slide.

So I think in kind of wrapping this up, again, in change management, when you think about succession planning, we think about how will we move forward. That is one of the key things that's impacted almost every organization that I've dealt with, that needed to be transitioned and improve. It was a lack of succession plan. It was a lack of being able to pass the torch.

How is it shaped? What should be included? What are part of the goals? And who are those potential successors? Creating a plan that outlives the agency but is an upward and a stable trajectory. That's important.

Someone asked in part of the Q&A as to whether we felt that most people have recovered from the pandemic post-ending of the eviction moratorium. Is it okay for me to answer that question now?

Sid Alvarado: Yes, definitely.

Marcia Lewis: What we're finding and it's very timely, actually, because I was in a large city-wide group meeting yesterday to kind of talk about this topic. We are actually just beginning to truly see the transition from the eviction moratorium, really show itself in numbers. We are finally beginning to see the fact that owners are beginning to either utilize programs of rental assistance programs that have been provided through funding from the CARES Act, or that they are moving away from allowing leniency because of the inability to pay rent.

There has been a period -- we thought that the cliff would be September when the moratorium ended. It was not. There seemed to be some people were able to sustain their housing, but now we're beginning to see numbers of evictions rise. And we are beginning to see people who are looking for assistance in trying to pay rent that is past due over 12 months.

So that's kind of what is beginning to happen. And conversations are being held about how to assist people, because at the same time, the affordable housing that is there is -- the numbers are reducing. And it's harder and harder for people to find new housing upon eviction.

Courts are beginning to open back up. I've dealt with about three different states on this subject. And it appears that people are having to come together to figure out strategies for people who are becoming subject more and more to eviction, unfortunately.

So at this time I want to pass it over so we can hear more about succession planning and enabling resiliency. And I'll give it to you, Sid.

Sid Alvarado: Thank you so much, Marcia. You really said a lot, a lot of really key helpful things. You really provided an extensive peek into how taking the right steps during the transition and rebuilding is important.

And as a former leader of a pretty robust housing counseling program, there are a few things that you said that really just connected with me. You really talked about how transparency is important to help to support the right narrative as opposed to the narrative that's going on when people in the community are not really aware of what's going on.

And I think even more importantly, you talked about celebrating the wins, that's really crucial when it comes to rebuilding as well as transitioning within a program.

And the last thing you talked about was succession planning and the role that that can play. And so I'm going to pick up there and just talk a little bit more about succession planning.

So we along HUD as well as ICF, worked on a really instrumental guide and template that we felt was really important and essential, especially when we're looking at the climate where a lot of organizations are just also keeping in mind just the post-certification process.

There's a lot of transition that may be going on within agencies that Marcia spoke about, that many agencies are able to identify with.

So if you were to go to HUD Exchange and you were to go to Programs and then click on Programs, under that you'll see housing counseling.

You'll come up to the housing counseling page. And right on that housing counseling page on HUD Exchange, you'll find these succession planning instructional guide and template.

And what you'll find in this particular guide, which we're going to go over in just a moment, is one of things that you're going to find in this guide is, you're going to see how we compare as well as differentiate these succession plan and the COOP, which is the Continuity of Operations Plan.

And then even more so, we're breaking it down. There's a template that is provided in this guide here. And it's a template that's basically for large programs and for those smaller programs; some of the things that you have to think about when you're building these succession plan.

And so what I'd like to do at this time is, I'd like to take a moment to actually show you a little bit about the guide, if you haven't had the opportunity to check out the guide yet yourself.

And so it is a 14-page guide; however, there's lots of visuals in here. So it's not just 14 pages of narratives. There are some examples, which I think is really important in helping agencies to build a succession plan.

So it starts off with basically the directions and the directions -- I'm sorry, the instructions -- and the instructions is letting you know how crucial a succession plan is to an organization.

And as I stated, Marcia just gave us some really good examples as to why it is really important to have a succession plan within the organization.

You'll find that throughout this guide, there are also some hyperlinks. So these hyperlinks will lead you to some additional resources that will help you when you're thinking about it.

We talk about who should use this guide. So we have -- no matter how large or how small your agency is, there definitely is going to be some transition.

So what we do here is, we kind of break down that if you are starting this succession planning process within the organization, what that would look like for your agency, if you are a small agency. When we say small agency, perhaps an agency that has 10 or fewer staff members.

And then we also break down, for those larger agencies, those agencies that have more than 10 staff members. And there are some things that we want you to keep in mind that we point to, that is going to be really important to you as you're creating and developing your action plan -- your succession plan.

We talk about HUD-9910, how that kind of comes into play. And of course, most importantly, the housing counseling handbook, because we know that all things housing counseling, right, falls under the information that is within that handbook. And that really is what kind of drives the housing counseling program.

So it's really important for agencies, especially leadership to become familiar with what is in the handbook. And so we kind of talk about that. And then we define what we believe the succession planning is. And as I said, we kind of differentiate how different it is from the COOP.

Of course, there are some similarities. You know, things such as planning for continuing of an operation, identifying agency, staff, and roles, and then developing procedures. Those are the things that are in common when it comes to the succession plan as well as the COOP.

But in addition to that, there are some differences. So when we're talking about the succession plan, we are looking at the long-term sustainability of leadership and change within that organization. Whereas with the COOP, it is basically a lot of times in response to emergencies.

So those are just a few of the differences that are highlighted here in the succession plan. And then it goes on to talk about what the benefits are. And so when we're talking about succession planning, we are talking about the organization. So what needs to go on in order for the

organization to continue. But then there is also that leadership that if there were some transition with in leadership, what does that look like.

So there's the two different breakdowns there that you need to think about when you are going to be creating the succession plan; what does the organization need versus what does leadership need.

And then we go a little bit more into it as far as providing you with the five steps to creating a succession plan is. And we don't just give you that broad five steps. We really go deep down into what those five steps are.

The first thing is, is basically choosing the succession planning team. That's really important. I myself have personally been involved in succession planning when it comes to an organization. And it's really important for all team members to be a part of succession planning.

As I said, just speaking about my personal experience, I had five offices in which I oversaw, and they were in five different areas, and they served five different communities. And what I've learned is that sometimes there were staff that were in certain locations that may have forged partnerships or may have forged collaborations with organizations, where I would not have known about if I didn't sit down with staff and say, "Okay, who are we partnering with?"

I'm not here at this particular location. But that's really important because if the staff member were to transition, we want to make sure that that partnership and that collaboration continues. But if leadership don't know about that partnership, then it's hard to continue for that to move forward.

So these are some of the things that we want you to think about when you are creating this succession plan is, it shouldn't just be leadership. There should be staff members basically at every level that come together and to create the succession plan that's going to be successful for the organization as a whole. So we give that five-step plan there.

We go on to talk about identifying key factors that are going to influence the plans, some things for you to think about, some of those nuggets for you to break down as well as some hyperlinks that are going to be helpful to you, just in case you need to draw in some additional documents or some resources as you are completing this.

The third step is talking about linking the succession plan to the agencies, over all strategic plan, for future planning, which is also really important.

The four-step goes into identifying sources for successors. And those sources for successors don't always have to be on the outside. We kind of get those juices flowing to think about who on the inside internally within the organization, might be able to kind of step up or transitioning into a different role that's going to help with succession.

And then finally, we talk about creating an implementation plan. So after we've done all the great work, we want to talk about how is this going to be implemented within the organization. So we

give some steps on some things to think about, on the things that you can do in order to implement this.

And then of course, we always want to give you resources. So all the resources that maybe are without -- within this succession plan, we list them here so you can go directly to them. And then we give you a background information as to why it's important when it comes to the succession plan. And then we talk about the planning process and give an example.

You may have leadership within your organization, you may have program managers, a finance team, those types of things. What are some of the core competencies, with actually thinking about even from an onboarding process. Maybe there is transition. We need to have someone else come in and fill this position.

What are some core competencies, some things that we need to think about when we are in that hiring process and when we're onboarding someone into the organization. And then what type of specialized skills should that person have.

We know that there are a lot of different management systems that we have to manage within housing counseling. Is this something that this person really needs to have, or they need to come up to speed pretty quickly if they're going to come into the organization. And then what type of education and certification.

And we know one of the certifications of course, is the HUD Housing Counseling Certification, that when you're talking about a counselor, that's just one of the certifications that we need to think about. And then if you have someone who is providing that reverse mortgage origination counseling, they need to have certification as well.

So no matter what the position is that you're hiring for or what transition is taking place, we need to think about, okay, what are some of these specialized skills and trainings certificates they need to have.

And then when you're doing it, when you're taking inventory within your organization and you're looking at this, is this position right now currently filled, or is this a vacant position that we need to think about filling. And what type of impact is it going to have on the organization.

So we gave those examples here. And then we gave example of a risk assessment analysis. So we know that there are certain positions that may see more transition than other positions. So we want to be able to basically highlight that. Is this something that we have to constantly be thinking about because for some reason, this particular position sees some high turnover.

So here's an opportunity for you to think about that as well as to evaluate that within your organization. And we've given a key here, so you can see exactly what is meant by high or medium or low impact. And then we get down into the template. We provided a template for two different types of organizations.

We provided a template for the larger organization as well the smaller organization, because the staffing is going to be a little bit different. Smaller organizations, you may have one person that's in a position that is maybe serving two or three different roles, whereas in a larger organization, there is the opportunity maybe for that one staff member to really focus on one particular key area.

So that's what we get into for this, and we provide, like I said, the template, and then we provide an example of what that could look like within your organization.

You'll also notice that in the template, it starts off with that agency work plan. Okay? So you're basically checking that box to say what is it that we said that we're going to do within our workplan. Does our workplan identified that we are going to be providing pre-purchase counseling as an organization, mortgage delinquency, rental.

So it basically kind of starts off there. And you have an opportunity in the very beginning to say, what are we going to commit to as an organization, are we going to review this succession plan quarterly, is this something that we are going to do bi-annually or is this something that we're going to do annually.

So that's something that you want to talk to your team about, as far as how often realistically that you're going to review this plan, and who is going to be responsible for being on that team and making sure that it gets updated.

And as I stated, there are some examples here, where if you're not really sure about how you should answer some things, we provide with a key and basically an example here, where you can you say, "Okay, I can follow you this."

So that we're making it a little bit more easy for you to, not only complete, we'll ultimately implement within the organization. So as I stated, you will find this resource on HUD Exchange. And we really hope that you as organizations, especially those that are in leadership, will take the opportunity to go through and to use this to get started with discussion. Because we do understand that there are a lot of agencies right now going through transition as well as rebuilding.

And now is an opportunity for some Q&A. So what I'm going to do is I'm going to do is I'm going to invite my colleague, Karen, to prepare some of those questions that may be in the Q&A box.

And before Karen gets started, I do have a question. I have a question for my speakers that has already comment. So I would like the opportunity to ask this question, and then we'll take some additional questions in the Q&A box.

And so if you haven't already, please go to the Q&A box and type in your question, and if time allows, we will be sure that we cover that. And even if time does not allow, we have the opportunity to engage in Whova, so we definitely will have the opportunity to keep some of this going if some of your questions don't get answered. Okay?

My first question is for Barbara. Your agency has a proven track record of community engagement. Why do you think that's an important element to include when thinking about organizational sustainability?

Barbara Busch: For a number of reasons. Our organization began as a community building organization. And all of our programs and services have come as a direct request from our neighbors. And that's been from my perspective, extraordinarily important. And it's been a hallmark of our success. Because I think some agencies over time, came in with an idea about what they should do. And then it didn't work, and they wondered why.

We believe that you stay close to your neighbors because they understand what's going on in their community. They know what they need, and they know, and they will tell you. And they will help you move forward.

And so we became very active in doing advocacy around issues that our neighbors told us about. You know, early on they said to me, "Hey Sister Barb, can we think about what we're going to do with these vacant property? And can we get vacant buildings fixed?"

And I said, "Well, fine. Who do we want to do that?" And they said, "You." And that's kind of been our experience. And then when we started doing housing development, they said, "You know, our kids don't know how to own. So what are you going to do to help them learn how to own so they don't make any mistakes?"

And that's how we developed our financial and economic learning piece. And all along the way during the pandemic, people came to us and said, "You know, we can't work," we've lost their jobs, food is real issue, and so we pivoted it. And we have never done this before. But we started doing popup food for people in our communities.

And as people came in, we ask them, "Well, what else can we do? What is it that you need? What do you think, we should either find somebody who can help you do it or what is it that we can do that will improve people's lives?" So we continued to do that.

And I'm a great believe that our best asset is the people in our communities who are willing to tell us the truth about our services and about what their needs are and how we might serve them.

Sid Alvarado: So I can see how your agency is really living up to that name, Working in Neighborhoods, where you are basically asking those in the community exactly what their needs are, and that's really important. Thank you so much, Barbara.

My next question is for you, Marcia. Your organization is in a process of ensuring you are stable and can be financially resilient, going forward. From your perspective, what will be some of the indicators that you are moving forward in a positive direction?

Marcia Lewis: Well, I think one of the things that is always an indicator is just the basic response we get from the people we serve. You know, quite often, you hear from people when

there are problems, but you know you're doing something right when people begin to thank you for your service. And they began to thank you for cleaning their community. They begin to thank you for providing staffing where there has been none before. They begin to thank you for sharing information, bringing programs back, reopening the community rooms that had been closed.

A lot of times the staff comes and says, "Well, we really appreciate what we're able to do and how we're able to contribute." Staff is beginning to volunteer to do things, partners are stepping up and saying, "I know you're trying. You may not have enough staff. How about we donate some maintenance services?"

We just had donations of cleaning around our playground areas in several communities. Now there's a lawnmower outside my window. We had to clean up playground areas in several of our communities, all donated, because people saw that we were making an effort.

And a lot of times, it just takes people seeing that you're trying, and then they will help, they will step up. We've had people who've said, you know -- there's so much of a delay in people being able to find housing because you don't have enough inspectors. So the continuum of care here locally, had 15 people trained to be inspectors. And now they're going to have some of those people in in our office and pay their salaries. But that will help us in being able to move the workload forward.

So again, a lot of times it's those partnerships that begin to be realized, and then just the simple response you get from people who are seeing that you're trying to serve.

Sid Alvarado: Thank you so much for that, Marcia. And I am pretty sure that as housing counselors, a thank you goes a long way, especially because of the hard work that we've really been doing and being on the frontlines here recently with all the changes and things that are going on. So I could definitely see how that could be much appreciated by housing counselors.

Karen, I am going to go over to you now. I know we probably have maybe time for one more question from the Q&A box. Is there a question that you're seeing, Karen?

Karen Hoskins: Yes. Thanks, Sid. Marcia, this question is going to be for you. It's somewhat of a two-part question. But you spoke about the importance of having a timeline as part of a rebuild process.

So the question is, how much time should be allowed for the initial information gathering and listening portion of the process? And secondly, how much time should we allow to evaluate whether new changes are working or not?

Marcia Lewis: That's a good question. And a lot of the answer depends upon how your agency is -- does your agency have other timelines that must be respond to. For example, I have an agency that is assessed annually at a certain time of the year.

I have an agency that has to submit audits at a certain time of the year. I know that I have to have certain things in place. So I tend to work off of quarters in a year. I tend to work off of a three-

month timeframe in determining what I need to do in trying to see how to get the lay of the land, if you will, assessed and then initiate based on the beginning of the quarter, what changes may need to occur.

I tend to allow more time for implementation because there are always unknown, unseen. In my business you can be renovating a unit and find something behind the wall. So there's always these unseen things that you can run into.

And so, give it a six-month period, which it takes a minute for people to accept, it takes a minute for people to go along, it takes a minute for people to give up.

Then at that point, it allows another quarter left to -- after that implementation period, to evaluate and determine. And maybe when you get to about the middle, maybe a little more than half of your implementation period, you know whether it is going in the right way, whether things are happening that you think -- or whether it is not working.

And I think one of the hardest things for us as leaders, as just human beings, is to say, "You know what, this is not working. I need to do something different." Because I think my ideas are brilliant, but sometimes my brilliant ideas don't translate into brilliant actions. So I think at that point, you have to be prepared to say, "Maybe we need to change things. Maybe we need to do something different." And then maybe build off of it.

If it was successful but it could be more, let's build off of it. What can we do? How can we clarify [ph] the results and add to it? Because I need to use a lot of what I do for the purposes of seeking funding to help me do something else.

So it's really important for me to have that tool of evaluating and looking at what is being done to see whether I can use it to move forward and do more.

Sid Alvarado: Thank you so much for that answer, Marcia. I'm sure that was very helpful. I would like to let everyone know that we have some resources for you. If you would like to get more information about the organizations that were highlighted here today as well as the direct link to the succession planning guide, we have that here for you.

The materials -- we've posted the link for you to get materials. We can continue this conversation on Whova. This is obviously something that is very interesting to a lot of the -- those who are in attendance today. So Whova is an opportunity for us to continually engage in this conversation as well as some previous conversations that you may have heard in some previous sessions. Stay connected. We always like for you to know how to stay connected.

We provided the event webpage as well as you can find us on HUD Exchange at hudexchange.info/counseling, in addition to a lot of the resources that are highlighted within this conference. And if you would like to email us, you can do so by going to housing.counseling@hud.gov.

So we are almost done, but not quite. We have one more exciting session for you, which starts at 4:30. This is an opportunity for you to hear from the OHC directors who have been very just instrumental in putting together and providing information on the conference, just being available, providing resources, being very resourceful to us. So definitely do not hesitate. And don't miss this final session of the conference. We really hope that you're going to be with us.

I would like to thank our speakers. Thank you so much, Barbara. Thank you so much, Marcia. And thank you so much to our ASL interpreters, who have been helping us throughout the conference. And I'd like to personally thank my colleagues, Karen Hoskins as well as Shawna Moraille, who has been helping behind the scenes with some of these questions. We look forward to seeing you in just a moment. And we hope that you've had a great session with us. Thank you.

(END)