



HUD Office of Housing Counseling
2022 Community Conference

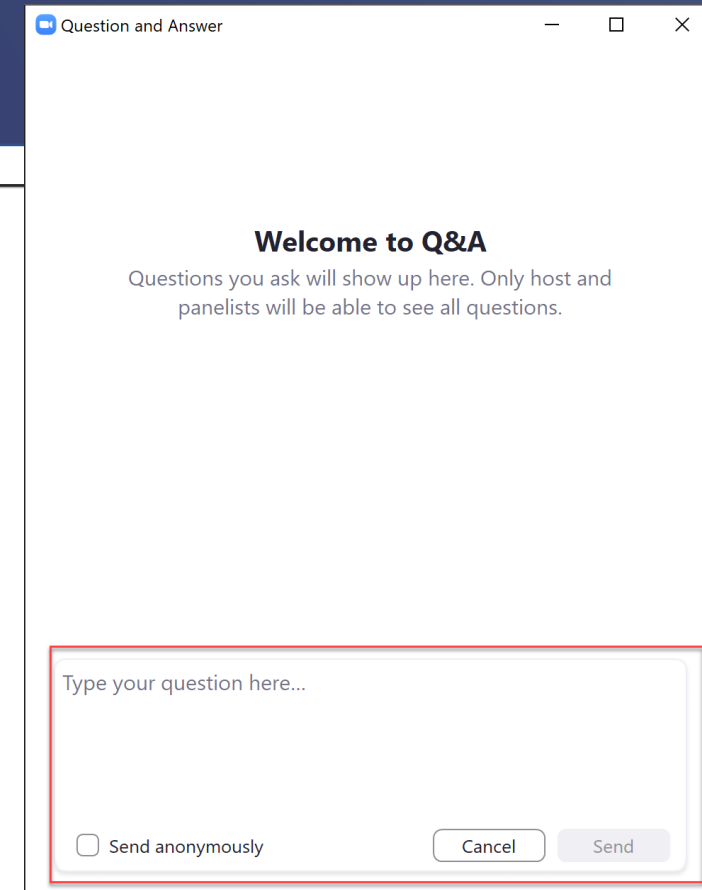
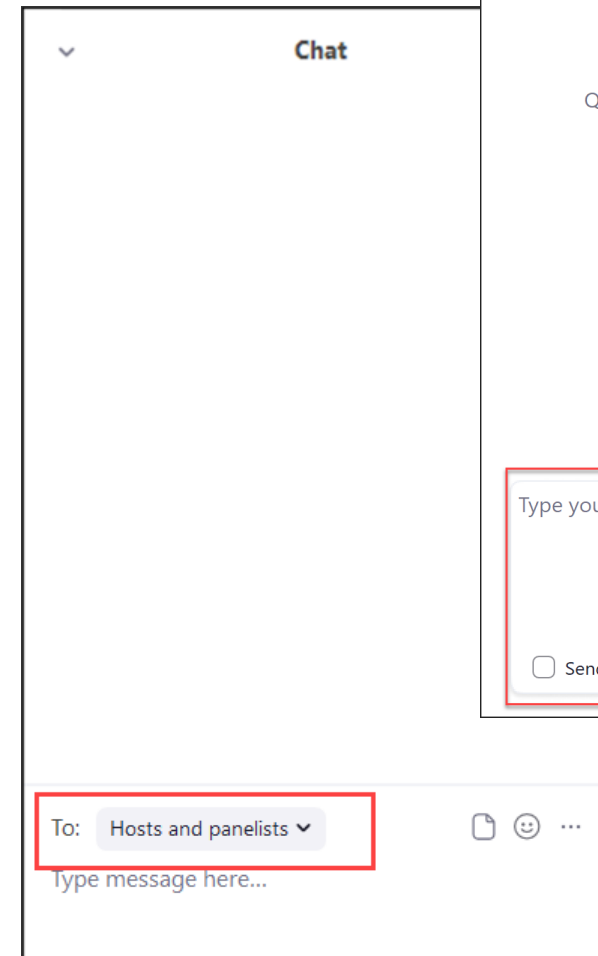
Championing the Resilience of Housing Counseling Agencies

Thursday, August 11th, 2022

3:00-4:00 PM EDT

Questions?

- **Chat**
 - Submit any technical issues via the Zoom Chat box
 - Send the message to the Host
- **Q&A**
 - Submit any content related questions via the Zoom Q&A box
 - Send to Host, Presenter and Panelists



Materials

- The PowerPoint has been posted for this session. We will provide the link in the Chat box.
- Webinar materials are posted on the HUD Exchange in the [Webinar Archive](#) 7-14 days after the live webinar
 - Find by date or by topic

Housing Counseling Webinar Archives

Page Description

This page contains links to the archived versions of previously recorded webinars presented by the Office of Housing Counseling. In order to listen to the archived webinar, you will need call the 800 # listed and enter the access code. Any course materials, including the PowerPoint Presentations are also posted. You should have the presentations available when you listen to the webinar. If you have any questions regarding the webinars archived on this site, please contact [Virginia Holman](#).

Training Archive – Audio Replay and Transcript:

- Audio replay numbers are only available for 12 months after the date of the webinar
- Transcripts are available for webinars from February 2016 going forward

Get Credit for Training Sessions

If you have attended or completed any of the training sessions below, select the "Get Credit" button on the training page in order to get credit and add the course to your transcript. You must have a HUD Exchange account in order to get credit for training sessions.

Need a HUD Exchange Account?

[Register Now](#)

Want to view webinars by topic?

The Office of Housing Counseling has a new page where webinars are organized by topic instead of date.

[Filter by Topic](#)

Click on the title to view webinar materials, and get credit for viewing the webinar.

| Webinar Title and Link | Description | Date |
|---|---|-------------------|
| Fringe Benefit Costs | This webinar discussed the Office of Management and Budget's (OMB's) cost principles related to fringe benefits and how to properly document and calculate fringe benefits. | February 15, 2022 |
| Training NOFO Grant Execution | This webinar was recommended for all grantees awarded funding under the 2021 Housing Counseling Training NOFO (TNOFO). | February 8, 2022 |

Certificate of Attendance

- Attendance will be marked following the live sessions.
- Once attendance is marked you can print a Certificate by logging into your account and going to your [Learning Transcript](#).
- Select the Course Name and click “Print Certificate”. *Not all HUD Exchange trainings offer Certificates.*

Housing Counseling Webinar: 9902 Form and Toolkit - Revision Highlights, Tips, and Tools

Close Record

Progress: Completed **Status:** Enrolled **Required:** Yes **Duration:** 1 hour

Print Certificate

— Activities

Class Sessions

Speakers

- **Sid Alvarado**, Lead Housing Counseling Specialist, ICF
- **Marcia Lewis**, Interim Executive Director, Indianapolis Housing Agency
- **Barbara Busch**, Executive Director, Working in Neighborhoods

Agenda

- Diversification
- Organization in Transition
- Succession Planning Template
- Q&A
- Resources

Diversification

Barbara Busch

Working in Neighborhoods



Working in Neighborhoods (WIN) Overview

- Location: Cincinnati, OH
- Service area: Urban, 10 neighborhoods
- # of staff: 17
- Counseling Services (across 11 counties):
 - Mortgage Delinquency and Default Resolution Counseling
 - Pre-Purchase Counseling
 - Pre-Purchase Homebuyer Education Workshops
 - Financial Management/Budget Counseling
 - Non-Delinquency Post Purchase Workshops
 - Resolving/Preventing Mortgage Delinquency Workshops



Working in Neighborhoods (WIN) Overview

Who We Are & What We Do



HOMEOWNERSHIP

WIN helps families grasp the dream of owning a home by rehabbing and building new homes throughout a neighborhood.



FINANCIAL LITERACY

WIN prepares families to purchase their first home by offering homebuyer training classes and individual counseling. Our training also focuses on working with families to save homes from foreclosure.



COMMUNITY BUILDING

WIN works to train and empower community leaders to work with their community, local & national resources, and local governments to resolve community issues and build thriving vibrant, stable communities.



Working in Neighborhoods (WIN) Overview

Who We Are & What We Do – Rental Housing

ST. PIUS PLACE

- Partnership with Sisters of Charity Senior Care & S. Cumminsville Community
- 18 Units Affordable Senior Rental
- HUD 202 Project



THE COMMONS AT SOUTH CUMMINSVILLE

- Partnership with National Church Residences
- 80 units of Permanent Supportive Housing
- 75% Units for People Exiting Chronic Homelessness



SHELTON GARDENS

- Partnership with American Community Developers
- 138 One & Two-BR Units
- 99% Project Based Section 8



Challenges

- During the recession we lost a lot of agencies
- Diversifying our funding streams
 - HOME Community Housing Development Organization (CHDO) for City of Cincinnati
 - Owner of affordable rental housing through the Low-Income Housing Tax Credit (LIHTC) program

Creative Partnerships

- How do we think about creative ways to do contract work with other organizations?
 - Landbank bought [194 single family homes](#) from out of town investor to turn into homeownership
 - WIN contracted with the Landbank to provide the current renters the opportunity to buy their homes
 - Increased staffing needs
 - Diversify your relations for the long-term benefit of growing your programs

WIN's Financial Stability Program

- Client focused
 - Provides a foundation to prepare for home ownership, especially for people who are not ready to buy, but do have a goal to purchase within the next 12-24 months
- Organization focused
 - There is a need to focus on individual families as well as neighborhoods to ensure our work is helping to build the neighborhood stability and long-term racial wealth.

Organization in Transition

Marcia Lewis

Indianapolis Housing Agency



Organization Rebuilder

- Experienced Affordable Housing Executive, leveraging decades of experience at HUD and other large public housing authority
- Demonstrated history of working with organizations in transition
- Skilled in Nonprofit Organizational - Budgeting, Policy Analysis, Strategic Planning, and Accounting
- Leadership experience crosses range of public and private sector.
- Experienced human development facilitator and strong business development
- Currently serving on HUD's Housing Counseling Federal Advisory Committee

Indianapolis Housing Agency Overview

- Location: Indianapolis, IN
- Service area: Urban
- # of staff: 85
- Counseling Services:
 - Mortgage Delinquency and Default Resolution Counseling
 - Pre-Purchase Counseling
 - Pre-Purchase Homebuyer Education Workshops
 - Financial Management/Budget Counseling
 - Fair Housing Pre-Purchase Education Workshops
 - Services for Homeless Counseling
 - Rental Housing Counseling
 - Rental Housing Workshops
 - Non-Delinquency Post Purchase Workshops



Community Engagement

- Engage community to support agency goals. – Speak your truth.
- People fear change, but there is nothing constant but change – package and deliver it in non-threatening ways
- “Moving Forward Transition Plan” informs stakeholders in real time and opens the door to partnerships/support
- Who are the stakeholders who benefit from and need our services – Be inclusive through continuous transparency.



Agency Sustainability

- Assess performance
- Set goals for improvement
- Establish timelines
- Determine composition of the team
- Identify deliverables
- Develop evaluation method(s)
- Report – Sell your successes; be honest about your fails; don't be afraid to reset



Moving Forward

- A critical part of change is creating a path forward – What guides your agency?
- Hard decisions –current condition and future vision
- Who do we serve? How are we doing? What can we change?
- Our plan focuses on key changes being implemented to improve the operations and condition of the agency which in turn improves the services it provides to its clients (e.g., management changes, sale of properties, re-organizing the agency, obtaining revenue to sustain the agency, etc.).



Change Management

- Succession planning within organizations like housing counseling agencies and other affordable housing agencies is critical in a time of less Federal investment and more need.
 - Determine who will shape it?
 - What critical factors should be included
 - How will it become part of the strategic goals for your counseling agency?
 - Who are the potential successors?
- Create a plan that out lives the present and takes your agency into an upward (and stable) trajectory into the future



Succession Planning Template



Succession Planning: Instructional Guide and Template

NEW



2022 Community Conference

OHC is sponsoring a virtual conference on **August 9-11, 2022**, for all of HUD's participating HCAs and their counselors to network with housing counseling leaders.

[Register Today](#)



Latest Updates Out of OHC

 Explore updates from OHC.

[Updated Find a Housing Counselor Tools:](#)

- [New HCA Locator Tool](#)
- [New Calling Services](#)

[Succession Planning: Instructional Guide and Template](#)



Agency Approval and Certification

Review criteria to participate in HUD's Housing Counseling Program.

[HUD's Housing Counseling Certification Requirements](#)

[Agency Approval Requirements](#)

[HUD-Approved Intermediaries](#)

[Agency Eligibility Tool](#)



Policy Guidance

Review regulations and policies.

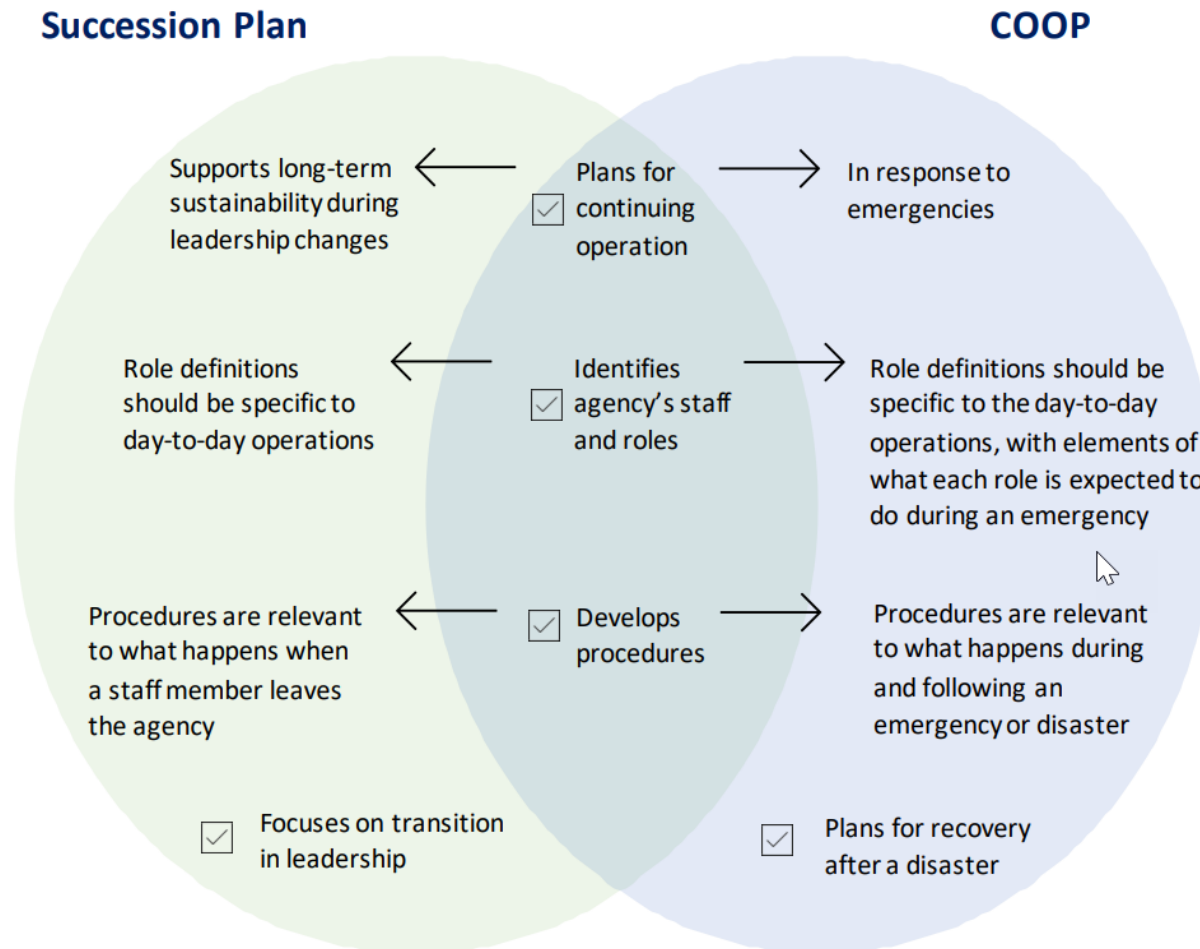
[Frequently Asked Questions \(FAQs\)](#)

[Program Handbook: 7610.1, Rev-5](#)

[Program Regulations: 24 CFR Part 214](#)

[Mortgagee Letters](#)

Succession Planning: Instructional Guide and Template (cont)



Succession Planning: Instructional Guide and Template (cont)

SUCCESSION PLANNING - TEMPLATE

The templates serve as examples and are not an exhaustive list. Agencies should identify dual roles within the department and linkages within the agency (e.g., staff who provide counseling, but also work in the real estate department).

Sample for **Larger** Agencies – (greater than 10 staff members)

| ABC Housing Counseling Services | | | | | | |
|---|--|---|--|-----------------------------------|---|--|
| Introduction | | | | | | |
| [ABC Housing Counseling Services] developed this Succession Plan to support the long-term sustainability of the agency. This plan was originally developed on [October 1, 2020] and is updated: | | | | | | |
| () Quarterly () Bi-Annually () Annually This plan was last | | | | | | |
| updated on [April 1, 2021]. | | | | | | |
| Services Offered | | | | | | |
| The services offered by the agency are those that are outlined in the agency's approved work plan and defined in the HUD Housing Counseling handbook . | | | | | | |
| Check all the housing counseling services the agency provides. | | | | | | |
| <input type="checkbox"/> Pre-purchase | <input type="checkbox"/> Post Purchase | <input type="checkbox"/> Mortgage Delinquency | <input type="checkbox"/> Rental | <input type="checkbox"/> Homeless | <input type="checkbox"/> Reverse Mortgage | |
| Succession Planning Preparation | | | | | | |
| Role | Name of Staff Member | Responsibilities | Core Competencies | Specialized Knowledge or Skills | Position Status | Impact on HUD Agency Essential Functions (refer to form 9910 and HUD Handbook) |
| CEO | | Oversee agency's operations. Works with CFO to create the annual budget for programs. | Financial management, communication, board relations, administration | Non-profit management | | |
| COO | | Oversees agency's administrative functions. | Administration, financial, management, planning | Business acumen | | |
| CFO | | Works with CEO to create annual budget. Conduct financial analysis. | Grants management, risk management | eLOCCS | | |

Q&A



Resources

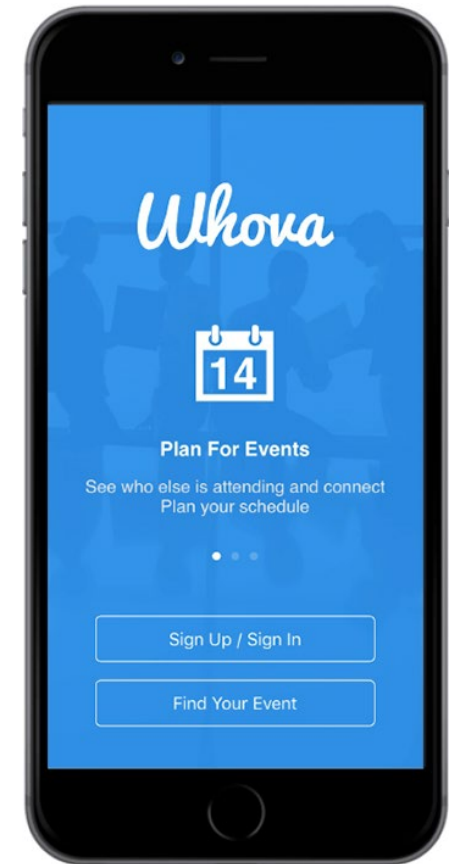
- [Working In Neighborhoods \(wincincy.org\)](http://wincincy.org)
- [Indianapolis Housing Agency \(indyhousing.org\)](http://indyhousing.org)
- [Housing Counseling: Succession Planning: Instructional Guide and Template \(hudexchange.info\)](http://hudexchange.info)

Continue the Conversation on Whova

- Explore the **professional profiles** of event speakers and attendees
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- Receive **update notifications** from organizers
- Access the **event agenda**
- Utilize **session materials** and **resources**

Web App Link: https://whova.com/portal/webapp/oohcc_202208/

Invitation Code: community2022



Stay Connected!



- **Event Webpage:**
<https://www.hudexchange.info/trainings/housing-counseling-2022-virtual-community-conference/>
- **Find us at:**
www.hudexchange.info/counseling
- **Email us at:**
Housing.counseling@hud.gov

Upcoming Session

| | |
|------------------|---|
| Day 3 | Thursday, August 11th |
| 4:30-5:00 PM EDT | Closing with OHC Directors |

HUD Office of Housing Counseling 2022 Community Conference

Thank you for Attending!

This material is based upon work supported, in whole or in part, by Federal award number C-19-TA-VA-0011 awarded to ICF by the U.S. Department of Housing and Urban Development. The substance and findings of the work are dedicated to the public. Neither the United States Government, nor any of its employees, makes any warranty, express or implied, or assumes any legal liability or responsibility for the accuracy, completeness, or usefulness of any information, apparatus, product, or process disclosed or represents that its use would not infringe privately-owned rights. Reference herein to any individuals, agencies, companies, products, process, services, service by trade name, trademark, manufacturer, or otherwise does not constitute or imply an endorsement, recommendation, or favoring by the author(s), contributor(s), the U.S. Government or any agency thereof. Opinions contained herein are those of the author(s) and do not necessarily reflect the official position of, or a position that is endorsed by, HUD or any Federal agency.

