



NCDA

National Community Development Association

Advanced CDBG: Managing an Effective Program/ CDBG/HOME Underwriting/Subsidy Layering (3 Days)

***Hosted by Sonoma County, CA
August 21-23, 2018***

Training Venue Location

Sonoma County Community Development Commission
1440 Guerneville Road
Santa Rosa, CA 95403

Course Overview

Advanced CDBG (2 Days)

The National Community Development Association (NCDA) is pleased to announce the delivery of a two-day advanced course on the Community Development Block Grant (CDBG) Program. Senior staff, new managers and experienced managers wishing to stimulate new ideas can benefit from the course. The agenda will include information and discussion on effective program planning, equitable allocation systems, program implementation challenges, leveraging resources and problem solving. The course will be reinforced through in-class exercises. Course participants will receive a training manual, including resource material. If you have specific issues you'd like to discuss, bring them with you.

CDBG/HOME Underwriting/Subsidy Layering (1 Day)

This one-day session will focus on the new HOME Underwriting/Subsidy Layering requirements and because HUD is going to be requiring CDBG grantees to establish CDBG underwriting policies/guidelines, how the HOME Guidelines may serve as the basis for establishing CDBG underwriting guidelines. The course is based upon the latest guidance from HUD on how to conduct underwriting and subsidy layering for homebuyer and rental development projects.

A course agenda and registration form is attached. The Early Course fee is \$400 for members and \$500 for non-members. In order to ensure a spot in the class, please register directly online at <http://www.ncdaonline.org/cdbg.asp>. If your community is sending more than one person to this training, please complete a registration form for each person. We want to ensure that each participant receives a copy of all the materials. Please email Steve Gartrell, sgartrell@ncdaonline.org with any questions.

REGISTRATION INFORMATION

REGISTRATION/PAYMENT

Register online at <http://www.ncdaonline.org/cdbg.asp>. During the registration process, you will have the option to pay by credit card or to receive an invoice. If someone else is registering for you, please have them include **your email address**, in the email box on the registration form. They may include their address in the Billing Section of the form.

Confirmation: You should receive a **confirmation message** from "National Community Development Association" immediately after the registration process. *If you do not receive this confirmation it means your registration did not complete and you are not registered.* Make sure that you go to the bottom of the form, enter the code listed, and hit "Submit." If it still doesn't work, please contact Steve at sgartrell@ncdaonline.org.

Early Registration (register by July 15, 2018)

NCDA Member Cities/Counties: \$400/person

Non-Member Cities/Counties: \$500/person

General Registration (July 16 – August 15, 2018)

Members: \$500/person

Non-Members: \$600/person

Payment Deadline: August 21, 2018; Payment received after this date will incur a \$50

late fee.

Cancellation: Cancellation made less than 2 weeks before the start of class will result in a penalty of \$100. No shows will be charged 100% of the registration fee. You may substitute another person by contacting Steve Gartrell at sgartrell@ncdaonline.org.

GENERAL INFORMATION

TRAINING SITE

The training will be held at Sonoma County Community Development Commission, 1440 Guerneville Road, Santa Rosa, CA 95403.

Please arrive 15 minutes early on the first day of the training for registration purposes.

HOTELS

Training participants will be responsible for obtaining their own hotel accommodations and transportation to and from the training.

TRANSPORTATION

The training venue is 8 miles from the Sonoma County Airport. Alaska (nonstops from SEA, PDX, LAX, SNA, & SAN), American (from PHX) and United (from SFO) fly there. You can get ground transportation information [here](#).

TRAVEL ARRANGEMENTS

Please do not make non-refundable travel arrangements until you receive confirmation that registration numbers have met the minimum.

ATTIRE - Business casual

QUESTIONS?

Contact Steve Gartrell at sgartrell@ncdaonline.org.

AGENDA

Advanced CDBG

DAY ONE: 8:30 a.m. - 4:30 p.m.

Introductions

- **The Big Picture: What are we trying to achieve?**
 - Program history and overview
 - National Objectives
 - Community connections
- **Planning: Making it real**
 - Consolidated Plan/Annual Plan
 - Citizen Participation
 - Conflict of Interest
 - Politics or community responsiveness?
- **Lunch** (on your own)
- **Allocation: Running a fair process**
 - Allocation Process
 - Evaluating proposals -- are they eligible and feasible?
 - Managing caps and deadlines

DAY TWO: 8:30 a.m. – 4:30 p.m.

- **Review of Day One Materials**
- **Implementation: Facing difficult issues**
 - Special challenges of Economic development activities
 - Working with partners
 - Cross-cutting regulations
 - Problem solving -- when a great plan doesn't come together
- **Lunch** (on your own)
- **Leveraging resources**
 - Building program income/ thinking as an entrepreneur
 - Stretching the dollar: CDBG as match/ Section 108 Loans/ CD Floats
 - Are you ready for the next new program? Having and tapping program capacity.
- **Communicating about the program**
 - With HUD: Performance measures/technical assistance/monitoring
 - With elected officials
 - With the community -- telling your story, listening to theirs
- **The Big Picture Revisited**

CDBG/HOME Underwriting/Subsidy Layering

DAY THREE: 8:30 a.m. – 4:30 p.m.

- **HOME rule requirements related to underwriting and subsidy layering**
- **How the HOME Guidelines may be adapted for establishing CDBG Underwriting Guidelines**
- **Subsidy layering**
 - Ensure appropriate HOME subsidy
 - Make sound investments over long term
 - Accurately project income and expenses
- **Lunch (on your own)**
- **Multi-family underwriting for rental housing development projects**
 - Rental developer capacity
 - Key elements of underwriting
 - Underwriting risk areas
- **Single Family underwriting for homebuyer development projects**
 - Market assessment
 - Homebuyer developer capacity
 - Underwriting – two step process
 - Development
 - Homebuyer
- **Resources**