



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

***Hosted by The City of Columbus OH  
March 19-21, 2019***

### **Training Venue Location**

City of Columbus Development - host  
77 N Front Street  
Columbus OH 43215

### **Course Overview**

#### ***Advanced CDBG (2 Days)***

The National Community Development Association (NCDA) is pleased to announce the delivery of a three-day course which combines Advanced Community Development Block Grant (CDBG) training and introduces requirements (current and proposed) for underwriting CDBG projects.

It is *highly recommended* that registrants have at least 3 years of CDBG experience before taking this course. People with less than that should take NCDA's CDBG Basics course first. The first two days focus on Advanced CDBG concepts & management. 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)**

The third day's 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 \$450 for members and \$550 for non-members. In order to ensure a spot in the class, please register 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](mailto:sgartrell@ncdaonline.org) with questions regarding registrations.



Note to NCDA Members who are **AICP** credentialed: NCDA has been approved as an **AICP Certification Maintenance (CM) provider**. This session is qualified as a CM event. This is qualified as a **CM I 17** (17 hours of credit). *To receive CM credit, you must sign in to the class and remain for the entire session.*

## **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](mailto:sgartrell@ncdaonline.org).

**Early Registration** (register by February 15, 2019)

NCDA Member Cities/Counties: \$450/person

Non-Member Cities/Counties: \$550/person

**General Registration** (February 16 -March 15, 2019) Registrations not accepted after March 15, 2019

Members: \$550/person Non-Members: \$650/person

**Payment Deadline:** March 19, 2019; Payment **must** be received by March 19, 2019 for admittance to class.

**Cancellation:** Cancellation made after March 4, 2019 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](mailto:sgartrell@ncdaonline.org).

## **GENERAL INFORMATION**

**TRAINING SITE:** The training will be held at City of Columbus Development 77 N Front Street Columbus Ohio.

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

### **HOTEL**

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

**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 Rita Pribyl at [rpribyl@ncdaonline.org](mailto:rpribyl@ncdaonline.org).

Airport, ground information and hotel information provided by the host community

- Training Location – 77 N Front Street, Columbus, OH 43215
  
- Airport – John Glenn International Airport (**CMH**)
  - <https://flycolumbus.com/>
    - Air Canada Airlines
    - American Airlines
    - Delta Airlines
    - Envoy Air
    - Frontier Airlines
    - Southwest Airlines
    - US Airways Express
    - United Airlines
  
- Taxi, Rideshare (Lyft, Uber), AirConnect
  - <https://flycolumbus.com/getting-to-from/taxis-rideshare>
  - <https://flycolumbus.com/getting-to-from/public-transportation>
  
- Hotel:
  - DoubleTree Suites by Hilton Hotel Columbus Downtown
  - Hotel LeVeque
  - Residence Inn by Marriott Columbus Downtown

# 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**