



Advanced HOME/Underwriting July 16-18, 2019 Columbus, Georgia

Training Venue Location

Columbus Convention & Trade Center
801 Front Ave
Columbus, GA 31901

Course Overview

Advanced HOME (Days 1 & 2)

The National Community Development Association (NCDCA) is pleased to announce the delivery of a three-day Advanced course focusing on the HOME Investment Partnerships Program. This course provides a follow-up to the HOME Basics course with a more detailed look at actual HOME-funded projects, including grant agreements, initial and ongoing compliance, and the use of innovative partnerships to more effectively address housing needs with HOME funds.

Days 1 and 2 begin with a brief review of HOME requirements, followed by a hands-on review of housing data resources used to identify HOME-funded activities that best meet the needs of local communities. Participants will delve into the details of different types of HOME activities, including using HOME with Low-Income Housing Tax Credits (LIHTC), HOME and Permanent Supportive Housing for Individuals experiencing homelessness, CHDO projects, homebuyer programs, and rental projects. Examples are based on experiences of NCDCA member-practitioners.

Course participants will receive a manual that includes HOME resources, and sample HOME policies, grant agreements, and compliance checklists. Group exercises are built into the course, designed to increase networking among attendees, and sharing of actual HOME experiences.

HOME Underwriting/Subsidy Layering (Day 3)

Day 3 will focus on the HOME Underwriting/Subsidy Layering requirements. 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 is below. The Early Course fee is \$450 for members and \$550 for non-members. In order to ensure a spot in the class, please register directly online at

<http://www.ncdaonline.org/home.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.

Prerequisites

NCDA's Advanced HOME/Underwriting course has been developed for practitioners who have completed HOME Basics and have two or more years of HOME experience.

Class schedule is from 9am - 4:30pm each day of class, with a break for lunch.



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/home.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 June 8, 2019)

NCDA Member Cities/Counties: \$450/person

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

General Registration (June 9– July 12, 2019)

Members: \$550/person

Non-Members: \$650/person

Payment Deadline: *Payment must be received by July 16, 2019 for admission to class.*

Cancellation: Cancellation made after July 1, 2019 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 the Columbus Convention & Trade Center 801 Front Ave, Columbus GA 31901 Venue is in Uptown Columbus https://visitcolumbusga.com/visit/things-to-do/uptown_columbus

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. The nearest hotels, as provided by the host community are:

Columbus Marriott	800 Front Ave Columbus GA	.01 mile – across from training venue
Rothschild – Pound House Inn	201 7 th Street Columbus GA	.04 miles
Hampton Inn & Suites		
Phenix City – Columbus area	620 Martin Luther King Jr Pkwy N Phenix City, AL	1 mile
Courtyard by Marriott		
Columbus/Phenix Riverfront	1400 Whitewater Ave, Phenix City	1.4 miles
Holiday Inn Express & Suites	1702 US 280 Bypass, Phenix City	2.7 miles

TRANSPORTATION

The training venue is about 6 miles from the Columbus Georgia airport, service by Delta Airlines. <http://www.flycolumbusga.com/>.

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 on next page

NATIONAL COMMUNITY DEVELOPMENT ASSOCIATION
Advanced HOME/Underwriting
Course Agenda

AGENDA

DAY ONE: 9:00 a.m. – 4:30 p.m.

Introductions & Course Objectives

Advanced HOME

I. Review of HOME Basics

- A. One-page summary of HOME caps, deadlines, affordability periods, etc.
- B. HOME Regulation Highlights

II. Know Your Housing Market

- A. Where are the gaps -- using data to identify priority housing needs
- B. Selecting an effective mix of HOME activities

III. A Focus on the Partnerships in HOME Investment Partnerships Programs

- A. How partnerships can change the dynamic of your HOME program
- B. Homeowner Housing: CHDO Partnerships
- C. Rental Housing: HOME and Low-Income Housing Tax Credits
- D. Multi-Jurisdiction Projects

IV. Program Income and Match

- A. Using PI to maximize funds for housing
- B. Meet Your Match

DAY TWO: 9:00 a.m. to 4:30 p.m.

V. Serving Special Populations

- A. Housing for Persons with Disabilities
- B. Housing for Homeless
- C. Addressing Other Special Needs Populations

VI. Monitoring

- A. Using IDIS to Your Advantage – Reports and Flags
- B. Desk Reviews and On-site Monitoring Strategies
- C. Avoiding common HOME monitoring findings

VII. Policies and Procedures

- A. Reviewing Your Policy Portfolio
- B. Making a list and checking it twice

VIII. The Future of HOME

- A. Telling Your Story
- B. Increasing Community Support

HOME Underwriting/Subsidy Layering

DAY THREE: 8:30 a.m. – 4:30 p.m.

I. HOME rule requirements related to underwriting and subsidy layering

II. Subsidy layering

- A. Ensure appropriate HOME subsidy
- B. Make sound investments over long term
- C. Accurately project income and expenses

III. Multi-family underwriting for rental housing development projects

- A. Rental developer capacity
- B. Key elements of underwriting
- C. Underwriting risk areas

IV. Single Family underwriting for homebuyer development projects

- A. Market assessment
- B. Homebuyer developer capacity
- C. Underwriting – two step process
 - 1. Development
 - 2. Homebuyer

V. Resources