



Advanced CDBG: Managing an Effective Program + CDBG/HOME Underwriting/Subsidy Layering

August 19-21, 2020

Beloit, Wisconsin

Training Venue Location

Beloit Public Library
605 Eclipse Boulevard
Beloit, WI 53511

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 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.*



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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 (through July 8, 2020)

NCDA Member Cities/Counties: \$450/person Non-Member Cities/Counties: \$550/person

General Registration (July 9 - 29, 2020)

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

Late Registration* (July 30 - August 14, 2020)

Members: \$600/person Non-Members: \$700/person

**Note, late registration is allowed via credit card only, payment by check is not allowed*

Cancellation Deadline: (July 29, 2020)

- ❑ To cancel, contact Steve Gartrell at sgartrell@ncdaonline.org
- ❑ Cancellation made before the cancellation deadline will be fully refunded.
- ❑ Cancellation made after the deadline will not be refunded; instead, a staff person may be substituted at no charge, or credit for a future course may be issued (less a \$100 cancellation fee).
- ❑ No shows will be charged 100% of the registration fee.

Payment Deadline: (August 4, 2020)

Payment **must** be received before the class date for admittance to class. During the registration process, you will have the option to pay by credit card or to receive an invoice.

- ☐ Payment by check is due *no later than* two weeks before the class begins
- ☐ Payment not received by two weeks before the class begins must be made via credit card, contact Michael Lightfield at michael@ncdaonline.org for assistance
- ☐ Payment for registrations made during the late registration period are to be made via credit card only

TRAVEL ARRANGEMENTS: *Please do not make non-refundable travel arrangements until you receive email confirmation that registration numbers have reached the minimum required number to hold class.*

Hotel and air transportation information provided by the host community.

TRAINING SITE: The training will be held at **Beloit Public Library, 605 Eclipse Boulevard, Beloit, WI 53511**. 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. *Suggestion: ask if the hotel offers government rates. The hotels listed below are near the training site. Some MAY offer airport transportation and/or transportation to the venue. Inquire with the hotel for these services.*

- IronWorks Hotel, 500 Pleasant St, Beloit, WI 608-362-5500
- Hotel Goodwin, 500 Pleasant St, Beloit, WI 608-473-1400
- Hampton Inn Beloit, 2700 Cranston Rd, Beloit, WI 608-362-6000

AIRPORT TRANSPORTATION

Beloit is served by Chicago-Rockford International Airport (RFD), which is 33 miles away and Dane County Regional Airport (MSN) which is 56 miles away. Both are served by several airlines. More information can be found at the airport websites: Chicago Rockford <https://flyrfd.com/> or Dane County <https://www.msnaairport.com/> .

GROUND TRANSPORTATION

Ground transportation options include hotel shuttles (check with hotel to determine service), paid shuttles, public transportation, taxis, ride shares, and rental cars. Additional information can be found on the airport websites:

Chicago Rockford <https://flyrfd.com/ground-transportation/>

Dane County https://www.msnaairport.com/parking_transportation/ground_transportation

DRESS - Business casual

QUESTIONS? Contact Heather Johnson at hjohnson@ncdaonline.org



Advanced CDBG: Managing an Effective Program Course Agenda

Breaks will be taken mid-morning and mid-afternoon. Lunch will be on your own from 12:00 - 1:00.

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**