



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

## **July 17-19, 2023**

### ***Santa Cruz, CA***

#### **Training Venue Location**

Santa Cruz Civic Auditorium  
Tony Hill (ABC) Room  
307 Church Street  
Santa Cruz, CA 95060

#### **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 is attached. The Early Course fee is \$350 for members and \$450 for non-members. Early Registration is available through May 12, 2023. 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 register each person on the same registration screen. If your organization registers four or more participants on the same screen, a 15% discount will be automatically applied. [Please contact NCD Staff with any questions.](#)



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



# Advanced CDBG: Managing an Effective Program + CDBG/HOME Underwriting/Subsidy Layering July 17-19, 2023 Santa Cruz, CA

## 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 (Through May 12, 2023)**

NCD A Member Cities/Counties: \$350/person      Non-Member Cities/Counties: \$450/person

### **General Registration (May 13 - June 23, 2023)**

NCD A Member Cities/Counties: \$450/person      Non-Members: \$550/person

### **Late Registration\* (June 24 – July 14, 2023)**

NCD A Member Cities/Counties: \$550/person      Non-Members: \$650/person

*\*Note, late registration is allowed via credit card only, payment by check is not allowed. Late registrations cannot be cancelled.*

### **Cancellation Deadline: (June 23, 2023)**

- To cancel, contact Heather Johnson at [hjohnson@ncdaonline.org](mailto:hjohnson@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:** (July 17, 2023)

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](mailto: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 Santa Cruz Civic Auditorium, Tony Hill (ABC) Room, 307 Church Street, Santa Cruz, CA 95060. 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.*

- Hotel Paradox; 611 Ocean St, Santa Cruz, CA; 831-425
- Pacific Blue Inn; 636 Pacific Ave, Santa Cruz, CA; 831-600-8880
- SureStay Hotel by Best Western Santa Cruz, 516 Water St, Santa Cruz, CA; 831-426-6111

**AIRPORT TRANSPORTATION**

San Jose International Airport (SJC) is approximately 35 miles from the training site. San Francisco International Airport (SFO) is approximately 60 miles from the training site. Both are served by all major domestic airlines. More information can be found here: San Jose <https://www.flysanjose.com/> San Francisco <https://www.flysfo.com/>

**GROUND TRANSPORTATION**

- San Jose International Airport (SJC) is approximately 35 miles from the training site. San Francisco International Airport (SFO) is approximately 60 miles from the training site. Ground Transportation options will vary by the airport you choose, but could include rental cars or shuttle services. Due to distance from the airport, hotel shuttles are unlikely, but it never hurts to ask your hotel for assistance in choosing a ground transport option.

**DRESS - Business casual**

**QUESTIONS?** Contact Heather Johnson at [hjohnson@ncdaonline.org](mailto:hjohnson@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**