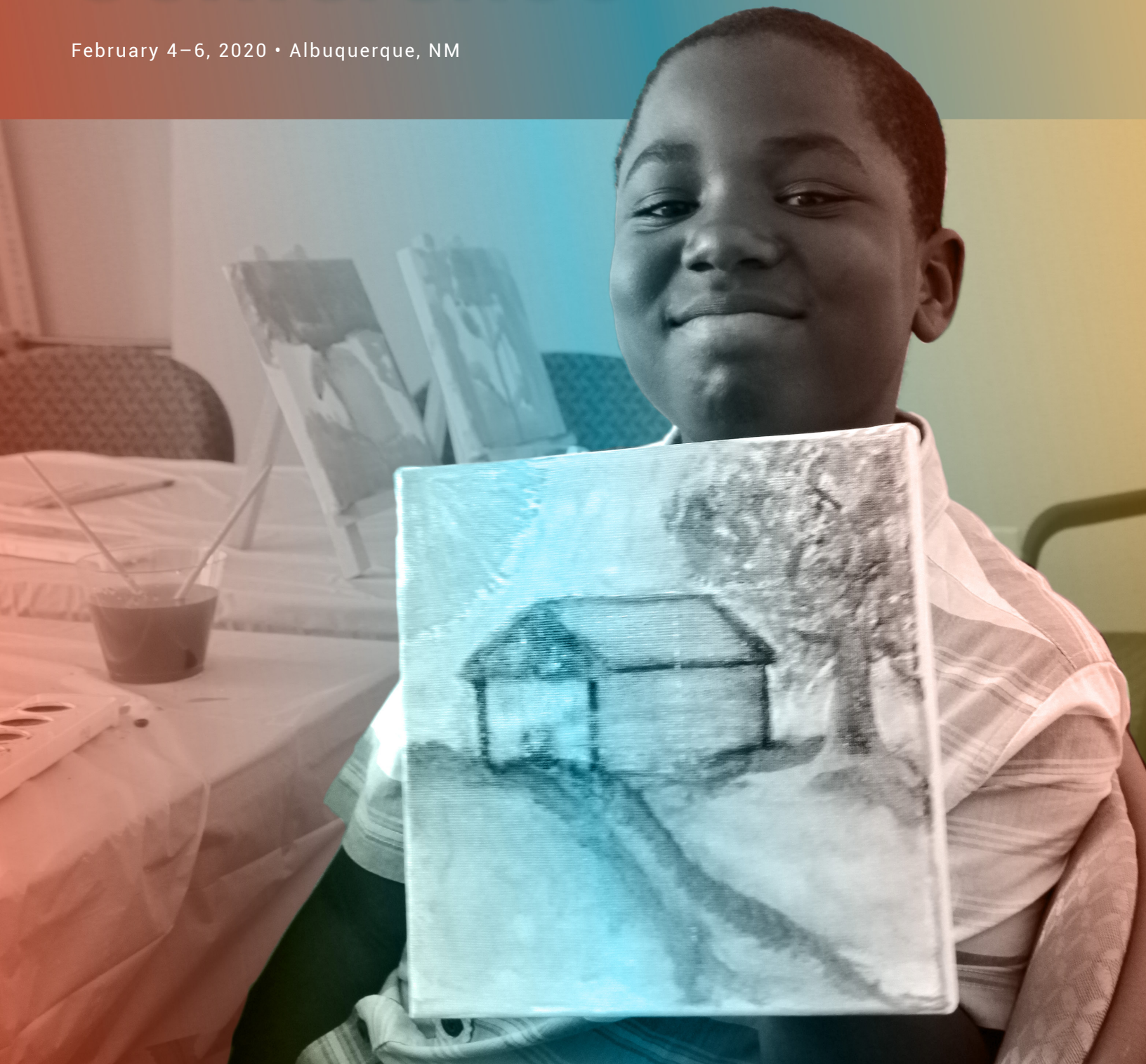


National Self-Help Housing Conference

SHARING THE VISION

February 4–6, 2020 • Albuquerque, NM





ABOUT THE CONFERENCE

Save the date for the 2020 National Self-Help Housing Conference in Albuquerque, New Mexico, Feb. 4–6, 2020. This will be a great opportunity for self-help grantees to learn and network with other grantees and USDA RD. This brochure lists the schedule and registration information. There will be no registration fee this year. The registration desk will be open on Monday, Feb. 3, from 4:00 pm–7:00 pm for early registration.

We hope you come to the conference for all of the learning and networking ... but New Mexico is the Land of Enchantment and visiting Albuquerque allows you to experience the REAL Southwest. Albuquerque is one of the oldest cities in the United States but Native Americans were in the area for centuries before, giving the state a diversified culture that is as unique as the land itself. Best known for its 13 Pueblos, Route 66, and extraordinary conditions for hosting one of the largest balloon fiestas in the world, New Mexico is an eclectic mix of Native American cultural variety, Mexican traditions and Catholic history. You will know you're someplace special, whether you're eating at traditional New Mexican restaurants, enjoying unique shops and galleries around town or enjoying the culture and beauty of the land.

Restaurants, breweries, museums, wine bars, billiards, dance clubs, live music, and tango and salsa dancing can

all be found nearby. From the classic Nob Hill area off neon sign laden Route 66, or enchanting Old Town which is home to many unique shops, galleries, boutiques and restaurants, Albuquerque has something for everyone.

Other highlights are: Rail Runner to Santa Fe, Route 66 Tour, Sky City Acoma, Sandia Peak Tramway, and Albuquerque Ghost Walk Tour.

Check out Visit Albuquerque for a list of activities, nightlife, restaurants, cultural activities and more at www.visitalbuquerque.org.

Location

Hyatt Regency Albuquerque
330 Tijeras Ave NW • Albuquerque, NM 87102

Book your room online at:

www.hyatt.com/en-US/group-booking/ALBUQ/G-RCAC

Book your sleeping room using group code "G-RCAC" before January 20, 2020 to get the Self-Help Conference rate of \$96.00 a night.

Register online at:

<http://shh2020.littledixie.org/>

For registration questions, contact:

Little Dixie Community Action Agency
jstillwell@ldcaa.org • 580-326-5165

SCHEDULE AT-A-GLANCE

TUESDAY, FEBRUARY 4

7:30 AM – 8:30 AM

Breakfast and Registration

8:30 AM – 10:00 AM

General Session: Welcome

10:15 AM – 11:45 AM

1944-I Update

Minimizing
Construction Time

523 Financial Grant
Management

Marketing &
Recruitment

Board
Responsibilities

Getting Fair
Appraisals

12:00 PM – 1:30 PM

Lunch: Keynote Speaker or Panel

1:45 PM – 3:15 PM

Successful Grant
Management

Cost Estimates, Bid
Process and Contract
Management

Direct vs Indirect
Cost

Counseling Families
to Eligibility

Strategic Planning

Using Technology
in Planning and
Development

3:30 PM – 5:00 PM

Layering Funding
Sources

Best Practices
Roundtable

502 Bookkeeping

Encouraging
Teamwork

Overview of
Self-Help Housing

Fair Housing

5:30 PM – 7:30 PM

Reception

Track Legend

Program
Management

Construction
Supervisor

Financial
Management

Group
Coordinator

Board/Organizational
Development / New
Organizations

Nuts & Bolts /
Universal

WEDNESDAY, FEBRUARY 5

7:30 AM – 8:30 AM

Breakfast

8:30 AM – 10:00 AM

General Session: Welcome

10:15 AM – 11:45 AM

Best Practices
Roundtable

Working with
Participants

Organizational
Financial
Management

502 Loan Packaging

Program Feasibility

Measuring and
Reporting on
Impact

12:00 PM – 1:30 PM

Lunch: Keynote Speaker or Panel

1:45 PM – 3:15 PM

Program
Diversification

Acquisition Rehab

Best Practices
Roundtable

Group Meetings

Good Policies for
Organizational
Success

SHARES

3:30 PM – 5:00 PM

Brainstorming
Program
Improvements

Owner Occupied
Rehab

Land Acquisition &
Development

Best Practice
Roundtable

Succession Planning/
Hiring and Human
Resources

Insurance

5:15 PM – 9:00 PM

Several optional tours will be available at a cost

THURSDAY, FEBRUARY 6

7:30 AM – 8:30 AM

Breakfast

8:30 AM – 10:00 AM

General Session

10:15 AM – 11:45 AM

E-Forms

Selecting House
Plans

523/524 Site Loans

Using Social Media
for Recruitment

Completing a 523
Grant Application

502 Packaging
Program

11:45 AM – 12:00 PM

Closing – Evaluation Turn In

SESSION DESCRIPTIONS

TUESDAY: 10:15 AM

■ 1944-I Update

1944-I updates are scheduled to be released prior to the conference: What are the new changes to 1944-I and what do they mean to my self-help housing program? Learn about the first changes to the regulations in years, what they will mean to the administration of the program in the future and how to ensure you're complying. We'll break down the changes and discuss the implications.

■ Minimizing Construction Time – Tools & Equipment, Using Today's Technology

Do you frequently struggle to find balance between minimizing construction time while meeting self-help program requirements? What is delaying construction progress and how? Can you speed up your construction projects? In this session, we will discuss innovative and contemporary construction methods, equipment and technology that will help you stay on schedule. We will review main causes of construction delays and hear from grantees on best practices.

■ 523 Financial Grant Management

This session will cover financial management for 523 grant funds. A brief overview of structuring your accounting system will be covered, as well as a discussion of federal requirements, allowed and disallowed program expenditures, federal tax forms, and the importance of budgeting.

■ Marketing & Recruitment

Marketing to rural communities can be challenging. Discuss how to develop a message and the marketing tools used to deliver that message. Come prepared to share your ideas!

■ Board Responsibilities

Board governance is critical. This session will discuss Board of Directors' authority, officer's responsibilities, board liability, maintaining good corporate standing,

meetings, personnel policies and warning signs for the Board. Exhibit E and evaluating a self-help program's housing development plan will be covered.

■ Getting Fair Appraisals

In this session, we will discuss the challenges that exist while appraising self-help homes and the ways in which the value of the properties is sometimes discounted. We will also share the experiences around the room and the challenges that the affordability restrictions pose to the fair valuation of the homes. This session will provide a forum to share not only your challenges but your solutions and best practices. At the end of the session, we hope to better understand the appraisal process and develop a list of solutions to ensure that the self-help homes are subject to a fair appraisal.

TUESDAY: 1:45 PM

■ Successful Grant Management

Are you familiar with the regulations and all terms and conditions associated with your grant? Who is responsible for grant management in your organization? In this session, we will discuss competencies, systems and keys to successfully manage a self-help grant. In an interactive format, we will review established and current trends in grant management and hear from other grantees on best practices that will help you to develop a system that works.

■ Cost Estimates, Bid Process and Contract Management

This session will outline bidding process practices, which leads to clear and concise construction contracts. Also included in this session will be preparation of cost estimates and tips for successful contract management.

■ Direct vs. Indirect Cost

If your organization has more than one program and/or more than one funding source, you should have a fair and equitable way of allocating allowable shared costs.



This may simply be a cost allocation plan or may include an approved indirect cost rate. But which one is right for your organization and what are the benefits and drawbacks of each? Learn the answers to these questions during this informative discussion dealing with fair allocation of costs.

■ **Counseling Families to Eligibility**

This session will encompass the applicant eligibility process from inquiry to approval for Rural Development Direct 502 and 504 programs. You will gain an understanding of counseling and coaching techniques to help transform housing inquiries into mortgage-ready clients.

■ **Strategic Planning**

Strategic planning is an important function of the Board of Directors and management. It is designed to look forward and create the most resilient and healthy organization possible. Learn about the process of strategic planning and how it can benefit your organization.

■ **Using Technology in Planning & Development**

Technology can be pricy and intimidating. Most of us have graduated to a more robust accounting system but did you know that other components of your program could benefit from a similar upgrade? This session will highlight a grantee that is using technology in recruiting and pipeline management, participant labor hours and budget review, bid processing and project management. We'll discuss the determination of cost effectiveness and the various options for you to choose from.

TUESDAY: 3:30 PM

■ **Layering Funding Sources (SHOP, AHP, HOME, Other)**

This session will explore the use of leveraged funds to bridge the gap on 502 mortgages. These funds can be instrumental in helping your organization meet the goal of assisting 40% very low-income households. Learn how using deferred loans and grants can assist you in helping more participants qualify.

■ **Best Practices Roundtable – Construction Supervisor**

Join us for an interactive session that will look at lessons learned and assist you with developing a support base with others in the same staff position. Share experiences, challenges and recommendations that create a successful self-help program.

■ **502 Bookkeeping**

Development of sound and consistent 502 bookkeeping practices will be explained, detailing the process for establishing and maintaining proper records. We will also cover the importance of the families' knowledge of their loan accounts. Custodial accounting and the traditional (SBA) method of bookkeeping will both be discussed.

■ **Encouraging Teamwork**

Effective teamwork begins with a motivated group coordinator working with the families to form groups in preconstruction meetings. It is important to keep construction groups motivated and working together. From preconstruction meetings through construction, come to hear and share strategies to keep groups collaborating well together.

■ **Overview of Self Help Housing**

Have you heard of USDA's Self-Help Housing program but weren't sure if it would be a good fit for your agency? This session will provide an overview of the program including new construction homeownership, the owner-occupied rehab and acquisition rehab programs. It will cover funding possibilities, regulations, and the grant application process, as well as eligible grant uses, program development, and staffing needs.



■ Fair Housing

Policies, procedures, and perceptions must support fair housing and civil rights laws throughout the management of the self-help housing grant. Learn how to make sure you are treating everyone fairly and preventing violations of fair housing laws before they occur.

WEDNESDAY: 10:15 AM

■ Best Practices Roundtable – Program Management

Join us for an interactive session that will look at lessons learned and assist you with developing a support base with others in the same staff position. Share experiences, challenges and recommendations that create a successful self-help program.

■ Working with Participants

Identify and work through the stumbling blocks that can and will come up while guiding families through the construction of their homes. Challenges are inevitable, but most can be overcome!

■ Organizational Financial Management

In this session we will discuss how financial statements can be used by your management team and board of directors. Proper fiscal controls and a review of how to prepare for an audit will also be discussed.

■ 502 Loan Packaging

A lot has changed in Section 502 loan processing recently; with new procedural notices, special guidance and even that final rule, there's been a lot to keep up with! We'll cover the changes that have occurred over the past year so you can avoid the common packaging errors and future delays. This session will help you improve the quality and completeness of your applications, getting your families a faster loan closing!

■ Program Feasibility

Are you considering operating a self-help housing program? How do you know if the program is right for your area and if it would be successful? There's a lot of work that should be done before deciding to go through with a self-help housing program. Learn what to look for in a community and what questions to ask before moving forward.

■ Measuring & Reporting on Impact

How do we measure the impacts of our self-help housing program and which ones matter to our funders, communities and organizations? Self-help housing influences our economies, communities and people's lives and this workshop will explore models of capturing and reporting on these impacts. Attendees will leave the workshop armed with practical tools for impact measurement.

WEDNESDAY: 1:45 PM

■ Program Diversification

Many organizations may need to diversify housing programs to continue assisting low and very-low income families. Come and hear about the alternatives that grantees are using to help their programs remain viable.

■ Acquisition Rehab

Is self-help acquisition rehab the right program for your organization? This session will look at this alternative or companion to the new construction self-help housing program. This could be a good strategy for sustainability in a sellers-market. We will look at some of the challenges grantees currently face and look at ways to overcome them.

■ Best Practices Roundtable – Financial Management

Join us in an interactive roundtable setting to discuss your most difficult financial questions and triumphs. Share your challenges, setbacks and success stories with other self-help organizations nationwide. Exchange solutions, best practices and problem solve together.

■ Group Meetings

We will discuss the use of preconstruction meetings as a tool to build the families into a team of homebuilders. This session will be interactive as we cover home planning, taxes, insurance, money management, conflict resolution and team building to increase productivity.

■ Good Policies for Organizational Success

This workshop is directed to organizational leaders that desire to recharge and move toward effective leadership. It will provide ideas to help identify policies, processes and/or procedures that could be improved to create greater efficiency or enhance the quality of your organizational documents.

■ SHARES

The Self-Help Automated Reporting Evaluating System (SHARES) will assist you in tracking your self-help housing programs' progress. It also provides much needed national statistics to track the success of self-help housing. This session will provide an overview and a discussion on the SHARES system.

WEDNESDAY: 3:30 PM

■ Brainstorming Program Improvements

What changes do you think the self-help housing program should make? Come to brainstorm potential program improvements for the future. (There are no current plans for RD to make major changes to the program ... but the contractors thought this would be a good time to gather suggestions.)

■ Owner-Occupied Rehab

As the markets continue to change many agencies have found sustainability by adapting their program to include the self-help owner occupied rehab component. We'll learn about the challenges and best practices of grantees successfully administering this program. We'll discover how they navigated the changes implemented by Rehab Guidance AN 4831 and have an opportunity for a best practices discussion.

■ Land Acquisition & Development

To be sustainable as rural practitioners, we find the need to diversify our organizations. In some cases rural non-profits end up not only managing their programs but also acting as the developer. Discussion topics will focus on the key roles of the development team and the steps to consider when starting a new project. We will share stories, resources, roadblocks, and barriers.

■ Best Practices Roundtable – Group Coordinator

Join us for an interactive session that will look at lessons learned and assist you with developing a support base with others in the same staff position. Share experiences, challenges and recommendations that create a successful self-help program.

■ Succession Planning/Hiring and Human Resources

We will discuss ways to recruit employees that are the best fit for your program. Developing and providing training for new staff members will be covered. The importance of succession planning and the steps involved in successful staff transitions will also be discussed.

■ Insurance

What types of insurance should your agency have overall and what types of insurance are required by funding partners and regulatory agencies? How about the self-help families and volunteers, are they covered on site? Come hear an update on best insurance practices and policies for risk management.

THURSDAY: 10:15 AM

■ E-Forms

Are you still mailing or emailing 502 loan applications to Rural Development? There's another method that is more secure and saves time in processing those applications. If you are not yet using E-Forms, come to learn more about it.

■ Selecting House Plans

Need to update your house plans or select new ones? Ever consider building duplexes, townhomes or multi-unit self-help homes and need plans? Join us to discuss how to choose house plans that are efficient, cost-effective and meet customers' needs. We will also discuss where to find them and how much they could cost.

■ 523/524 Site Loans

USDA Rural Development site loan programs tend to be underutilized. Find out if they would be a good source of funding for your program. We will discuss what this funding covers, who may apply, eligible areas, the terms of the loans, and how to get started.

■ Using Social Media for Recruitment

There are an infinite number of online methods we could use to recruit participants. Social media sites – Facebook, Twitter and Instagram are just some of the various platforms for connecting and sharing interests and information. This session will take a look at the most common and effective methods for participant recruiting, as well as the pros and cons of each.

■ Completing a 523 Grant Application

So, you are interested in applying for a self-help housing grant, but don't know where to start or what the application entails? This session will review what is required in a complete grant application. We will look at the application checklist and forms required by Rural Development.

■ 502 Packaging Program

How can you expand your affordable housing program using your existing organization's capacity? Become a Certified 502 Direct Packager and assist more families, expand your community impact and partners and bring in additional resources to your organization. Learn how the Certified 502 Direct Loan Packaging Program works and hear from self-help grantees who are using it. Attendees will explore the pros and cons of combining these programs and learn how to become a certified packager.

Register online at:

<http://shh2020.littledixie.org/>

For registration questions, contact:

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jstillwell@ldcaa.org • 580-326-5165