

# New Staff Resources

## Important USDA RD Links

### RD Email Notifications

Be sure to sign up for eGov delivery so that you receive all notifications that RD sends out.

<https://public.govdelivery.com/accounts/USDARD/subscriber/new?email=&commit=Sign+Up>

### Handbook 1-3550

<https://www.rd.usda.gov/resources/directives/handbooks>

Click on the gray HB-1-3550 Direct Single Family Housing Loans and Grants- Field Office Handbook

Scroll down

Click on HB-1-3550

From there you can download the entire book.

### Instruction 1944-I

<https://www.rd.usda.gov/resources/directives/instructions>

Click on the gray Part 1944: Housing

Scroll down

Click on 1944-I Self-Help Technical Assistance Grants

Click on PDF

From there you can download the entire book.

### Instruction 1924-A

<https://www.rd.usda.gov/files/1924a.pdf>

### RD Instructions (all of them)

<https://www.rd.usda.gov/resources/directives/instructions>

### RD Administrative Notices

<https://www.rd.usda.gov/resources/directives/administrative-notices>

# Important USDA RD Links Continued...

## RD Form Letters

<https://www.rd.usda.gov/resources/directives/form-letters>

## RD Procedure Notices

<https://www.rd.usda.gov/resources/directives/form-letters>

## Code of Federal Regulations Documents (CFRs)

<https://www.govinfo.gov/help/cfr>

## Grant Forms Repository

<https://www.grants.gov/web/grants/forms.html>

## RD Loan Packaging Information, Trainings & Webinars

Under the Training/Webinars section you can click on the actual training and there are recorded videos.

<https://www.rd.usda.gov/programs-services/services/direct-loan-application-packagers>

# Other Important Information or Contacts

## SHARES System Help

Please contact SHARES Technical Resources Coordinators Nancy Jacobsen or Anne Baker at [shares@rcac.org](mailto:shares@rcac.org)

## 502 Self-Help Loan Packaging Questions or Information

Please contact our 502 team at [rcac502training@rcac.org](mailto:rcac502training@rcac.org)

## 502 Direct Loan Packaging Questions or Information

Please contact our 502 loan specialist Helen Kibby at [hkibby@rcac.org](mailto:hkibby@rcac.org) or at 916-447-2854 ext. 1017

## Financial Management ToolKit, Financial Peer Group or Financial Staff Training

Please contact our Financial Management Specialist at [sbowley@rcac.org](mailto:sbowley@rcac.org)

## Self-Help Builder Newsletter

To access previous issues of the Self-Help Builder Newsletter follow this link <https://www.rcac.org/category/self-help-builder-news/>

# Self-Help Training Guides

Please download the following handbooks from our website.

<https://www.rcac.org/housing/mutual-self-help-housing/self-help-housing-resources/>

## **SELF-HELP TRAINING GUIDES AND HANDBOOKS**

The T&MA Contractors have produced a variety of training materials for the purpose of assisting grantees and training grantee staff. The following is a list of the available self-help guides and handbooks. Please contact your T&MA Contractor for a copy or for more information.

### **Orientation Guide**

Welcome to the USDA Rural Development's Self-Help Housing Program! Have you heard of the program but weren't sure if it would be a good fit for your agency? This guide provides an overview of self-help housing. From eligible entities to grantee responsibilities and how to determine your technical assistance grant amount, this will help you have a better understanding of the program and its requirements.

### **Board of Directors Governance Guide**

Board of Directors play a critical role in the success of any non-profit organization. With this in mind, the Board of Directors Governance Guide was designed for use by board members of any housing agency. It is an informational resource that may be used as a training tool and can provide new insights and a clearer understanding of nonprofit organizations, board meetings and operations, agency planning, administration of agency personnel, teamwork, orientation for new board members, federal accounting requirements, and agency activities.

### **Program Director Handbook**

It is the responsibility of the Program Director or Executive Director to administer a successful self-help housing program. This handbook takes a general look at the process of managing a self-help program as well as providing specific information on required reports, program criteria, grant and financial management, personnel, and fair housing.

### **Construction Supervisor Handbook**

The Construction Supervisor Handbook discusses the roles and responsibilities of the construction supervisor as it relates to self-help housing. This handbook covers aspects of the construction supervisor's job; from construction specifications, house plans, schedules, bill paying procedures, to group motivation. Insight is provided on how the self-help program operates and what is expected from the construction supervisor.

## Group Coordinator Training Handbook

Group Coordinators are central to the self-help program throughout the self-help participant's involvement from recruitment through construction and move-in to the completed homes. This handbook provides guidance for the group worker in maintaining effective communication and relationships within the group of self-help participants throughout the self-help process.

## Financial Management Handbook for Federally Funded Organizations

The purpose of the financial management handbook is to aid new and operating self-help grantees with the development of financial management systems and policies that are compatible with the fiscal responsibilities set forth by the funding agency (Rural Development) and the Office of Management and Budget (OMB). While self-help housing programs that have been operating for many years may have sophisticated financial systems and policies, others are lacking written, established procedures that assure proper internal controls.

## Individual Borrower 502 Loan Accounts

The self-help housing grantee is responsible for keeping an accurate account of the disbursements of funds from the individual self-help family's Section 502 loan accounts. Rural Development Instruction 1944-I indicates that the technical assistance provided by the grantee to the families should include "providing financial supervision to individual families with Section 502 loans, which will minimize the time and effort required by Rural Development in processing borrower expenditures for materials and contract services." This handbook provides guidelines for self-help grantees to use in designing the procedures necessary for a reasonable standard of control and a system of checks and balances to protect the participants and the grantee.

## Self-Help 502 Loan Guidebook

While the labor and construction are a group effort, each participant must qualify and obtain a loan individually from Rural Development. In order to qualify, a household must fall within the income guidelines set by Rural Development, must have demonstrated repayment ability, must have a good credit rating, and should have a low debt load. Because the 502 self-help loan process can be complicated for the individual, the technical assistance staff will pre-screen participants for program eligibility and prepare the application packages for Rural Development. The Self-Help 502 Loan Guidebook will help to train the Group Coordinator or appropriate staff person in packaging these loans.

## Preconstruction Meeting Guide

Each self-help grantee is responsible for organizing participants into self-help groups, which remain together from loan processing through construction. The organization of participants into groups reinforces the "mutual" aspect of the self-help program because participants within a group are expected to work on each other's house until all houses in the group are completed. In addition to organizing participants into groups, self-help grantees are responsible for explaining the self-help concept and methodology to participants, and for educating participants about their responsibilities as self-help participants, 502 loan borrowers, and homeowners. This is achieved through a series of "pre-construction meetings" which are covered in this handbook.

### Acquisition and Owner-Occupied Rehab Handbook

Although not fully utilized until 1995, the Self-Help Rehabilitation Program is permitted in RD Instruction 1944-I Self-Help Technical Assistance grants regulation. The rehab program is a separate component than the Self-Help New Construction and is a stand-alone program. However, new construction and rehab can be operated simultaneously. Offered as either an owner-occupied or acquisition-rehabilitation element, self-help rehab offers flexibility in the program when changing market conditions make land difficult to find, tough to develop a drop in the economy increases the housing stock, or low incomes make obtaining homes a challenge for homeowners seeking affordable housing under the traditional mutual self-help model. This handbook explains the program and regulations in detail.

### Application Handbook

To receive funding, organizations are required to apply to RD. This handbook provides detailed information to assist grantees in completing each item required on the RD checklist. Forms and samples for each section of the application are included. This handbook also includes helpful tips for accomplishing each item.

### Feasibility Handbook

Deciding whether to go forward with a self-help housing program is a big decision with many considerations. Forming a self-help housing program takes time, and a lot of decisions need to be made regarding program development. Does my organization qualify? Do we have the capacity to carry out the program? Is this program right for our service area? This handbook will help walk an organization through the feasibility process.