

**THE A-TEAM**  
**RCAC Regional Financial Peer Group**  
**10/12/2023 10:30 AM PST**



Welcome! Chatbox Moderator: Nancy Jacobsen [njacobsen@rcac.org](mailto:njacobsen@rcac.org)  
Facilitator: Samantha Bowley [sbowley@rcac.org](mailto:sbowley@rcac.org)

**Region Happenings:**

- **Any topics to be added to the agenda?**
- **Group Discussion:**
  - **What's going on? *Competing Priorities, but it's a new (fiscal) year!***
  - **Training Priorities:**
    - **1. Board of Director's Training – progress update** Samantha is working with Donna Lea (TA Provider RCAC) on review of previously used materials from other T&MA contractors, from RCAC archives, and from new research materials to update and/or create ten new module Board of Director (BOD) trainings:
      - Introduction to Self-Help & Your Role as BOD member
      - SH BOD's Roles & Responsibilities
      - Laws, Regulations & Guidance
      - Board & Agency Policies
      - Fiduciary & Financial Management
      - Compliance, Asset Protection & Limiting Liability
      - Effective Board Meetings
      - Resource Development, Community Outreach & Strategic Planning
      - Recordkeeping & Reporting Requirements
    - **2. 425 Close Out** discussed merits of making this "on demand" video housed in [Financial Toolkit](#) (FTK) so it can be referenced as needed; also visited and reviewed contents of online financial toolkit site and adjacent tabs for (accessible from FTK link) ***SH Trainings & Webinars, RD Regulations and Guidance Forms & SH Housing Handbooks***
    - **3. Financial Policies & Procedures** more work and templates to follow
  - **National Rural Housing Conference DC 10/24-10/27/23** Samantha will be presenting "*Navigating Self-Help Finance - The Road Map to Success!*" at the conference. Several grantees will have staff in attendance. Anne Baker from RCAC will be presenting on SHARES updates, and Angela Sisco from RCAC will be presenting on 502 & Appendix XIII updates as well.
  - **Self-Help Roadshow in Oregon in January – 2 Days: grantees & RD & RCAC! State-wide, all together refresher training session for RD and grantees, these sessions will continue throughout the region, throughout the year**
    - **Custodial Accounting**
    - **Appendix XIII and 502 Updates**
    - **Other exciting topics!**
  - **Other Issues** – discussion about SH Rehab & direct 502/504; Jairo Mercado was in attendance, Samantha introduced him as the newest member to the SH TA team, a few grantees in the near future will be fortunate to have him as their TA Provider! Jairo was able to share information about 502/504 direct packaging including, the fact that grantees do

not have to be certified to package 504 rehab loans, but there must be an active MOU in place that identifies employees that can package 504 loans; reminder too that those agencies with 523 grants in place will take precedence when their 502 group build loans are being processed over the direct 502 loan and 504 rehab applications; as land development presents a challenge, more grantees are looking at acquisition and owner-occupied rehab. Certification does allow grantees a larger fee for processing (see links to training opportunities at conclusion of notes)

- **Self-Help Employees Orientation** group discussed SH orientations, most agreed that in-person is best, and while quarterly seems like a lot, semi-annual may not be frequent enough to reach new grantees and those seeking refresher information; likely then to maintain the model in use now then for this fiscal year (quarterly, in-person)

#### **HOT Topics on the Back Burners:**

- SF 425 Close Out –
- Financial Policies & Procedures workgroup -
- Board of Director's Training –
- 1944-I Compliance Training -
- Budget Vs. Actual & Other Financial Reporting -
- Fiscal Sections of 523 Application -
- Processes & Internal Controls -
- Others?

**Next A-TEAM Meeting: 11/15/23 10:30 AM**

#### **Other Trainings/Resources:**

- [usda502directpackagingtraining](#) (RCAC, HAC & Neighborworks)
- [HAC Newsletter](#)
- [USDA RD Subscriber emails](#)
- [Self-Help Builder Newsletters](#)