



# **TRAINING SCHEDULE 2015-2016**

**Sponsored by The State of Florida, through the  
Florida Housing Finance Corporation's  
Affordable Housing Catalyst Program**



# WORKSHOP SCHEDULE

<ul style="list-style-type: none"> <li>• <b>OCTOBER 13</b> Ft. Lauderdale</li> <li>• <b>OCTOBER 15</b> Ocala</li> <li>• <b>NOVEMBER 4</b> DeFuniak Springs</li> </ul>	<p><b>PREPARING YOUR LHAP AND ENHANCING HOUSING STRATEGIES FOR SHIP PROGRAM</b></p>
<ul style="list-style-type: none"> <li>• <b>NOVEMBER 19</b> West Palm Beach</li> </ul>	<p><b>THE INCOME QUALIFICATION PROCESS</b></p>
<ul style="list-style-type: none"> <li>• <b>DECEMBER 3</b> Tallahassee</li> <li>• <b>DECEMBER 8</b> Ft. Lauderdale</li> </ul>	<p><b>SPECIAL NEEDS ASSISTANCE WITH SHIP FUNDS</b></p>
<ul style="list-style-type: none"> <li>• <b>JANUARY 19</b> West Palm Beach</li> </ul>	<p><b>THE REHABILITATION CONSTRUCTION PROCESS</b></p>
<ul style="list-style-type: none"> <li>• <b>FEBRUARY 25</b> Winter Park</li> </ul>	<p><b>PLANNING, FINANCING, AND DEVELOPING AFFORDABLE HOUSING FOR OWNERSHIP</b></p>
<ul style="list-style-type: none"> <li>• <b>MARCH 22</b> Ft. Lauderdale</li> </ul>	<p><b>EMERGENCY REPAIR, REHABILITATION AND RECONSTRUCTION</b></p>
<ul style="list-style-type: none"> <li>• <b>APRIL 7</b> Boca Raton</li> <li>• <b>APRIL 21</b> Palm Coast</li> </ul>	<p><b>ASSISTING AND MONITORING RENTAL HOUSING WITH SHIP</b></p>
<ul style="list-style-type: none"> <li>• <b>MAY 17</b> Orlando</li> </ul>	<p><b>REDUCING ENERGY COSTS FOR AFFORDABLE HOUSING</b></p>
<ul style="list-style-type: none"> <li>• <b>MAY 24</b> Clearwater</li> </ul>	<p><b>PREPARING FOR YOUR SHIP MONITORING VISIT</b></p>
<ul style="list-style-type: none"> <li>• <b>JUNE 9</b> Orlando</li> </ul>	<p><b>DEVELOPING AND PRESERVING RENTAL UNITS</b></p>

# WORKSHOP DESCRIPTIONS

## PREPARING YOUR LHAP & ENHANCING HOUSING STRATEGIES FOR SHIP PROGRAM

### OCTOBER 13 – FT. LAUDERDALE

Embassy Suites, 1100 SE 17<sup>th</sup> Street, Ft. Lauderdale 33316

### OCTOBER 15 – OCALA

Hilton Ocala, 3600 SW 36<sup>th</sup> Avenue, Ocala 34474

### NOVEMBER 4 – DEFUNIAK SPRINGS

Northwest Florida State College (Chautauqua Campus), 908 US Hwy 90 West, Defuniak Springs, FL 32433

Participate in a workshop designed to help you write a SHIP Local Housing Assistance Plan (LHAP) that is clear, concise and complies with all requirements. It is sponsored by the Florida Housing Finance Corporation's Affordable Housing Catalyst Program. Priority for attendance will be given to SHIP jurisdictions scheduled to submit an updated LHAP in May 2016. If space is available the workshop will be open to staff from all SHIP communities. The training will highlight details in the updated LHAP template, offer instructions on properly completing the Housing Delivery Goals Chart and other required forms, and help you assess how to enhance your housing strategies. Learn best practices to ensure quick approval, as well as common mistakes to avoid.

Participate in exercises designed to enhance your understanding of key plan requirements. The presenters will also address the development of an Affordable Housing Advisory Committee (AHAC) report, which must be completed before an LHAP is submitted.

### Who Should Attend?

- Housing program administrators, especially those with 2016 LHAPs due
- This workshop is designed keeping in mind the training needs of staff with five years or less of SHIP experience
- Staff responsible for completing the LHAP
- Staff responsible for convening AHAC committee

### Key Topics:

- Deadlines and responsibilities in the LHAP approval process
- Designing Housing Strategies that work in a changing market
- Properly defining terms of assistance
- Submission of the LHAP

# THE INCOME QUALIFICATION PROCESS

NOVEMBER 19 – WEST PALM BEACH

Hilton Palm Beach, 150 Australian Avenue, West Palm Beach, FL 33406

This is an intensive workshop on the details of income compliance designed specifically for those who process applications for SHIP assistance and the people who supervise them. One of the trainings most requested by SHIP staff, this course introduces numerous critical eligibility activities, including income verification, determining household size, and calculation of annual income. The training covers applicant intake, income and asset verification, and file documentation. Hands on exercises will challenge participants to apply qualification methods to case studies and to reflect on how lessons learned may be applied to each participant's daily SHIP work.

## Who Should Attend?

- New and experienced SHIP staff from local government and nonprofit organizations
- Local lenders or other service providers who are involved with the income eligibility process
- Homeless assistance providers providing ESG, CoC, or other services requiring income eligibility determination

## Key Topics:

- Newer methods of income verification
- Certifying income
- Issuing the award letter
- Tracking and reporting program accomplishments

# SPECIAL NEEDS ASSISTANCE WITH SHIP FUNDS

## DECEMBER 3 – TALLAHASSEE

Four Points Sheraton, 316 W. Tennessee Street, Tallahassee, FL 32301

## DECEMBER 8 – FT. LAUDERDALE

Westin Ft. Lauderdale, 400 Corporate Drive, Ft. Lauderdale 33334

This workshop will help housing administrators use a minimum of 20 percent of the SHIP allocation to serve persons with special needs, which is a set-aside requirement for the three most recent rounds of SHIP funding. This training will review documentation and reporting requirements related to each type of applicant with special needs as defined in s. 420.0004 of the Florida Statutes. It will help you fine tune your plan to comply with the special needs requirement in a timely fashion. Learn about successful initiatives from SHIP communities. Consider how your local Center for Independent Living, ARC agency, homeless assistance providers and homeless Continuum of Care (CoC), or other service provider can help you identify special needs applicants in need of housing assistance. Presenters will also discuss how to assist special needs applicants through collaborations with CoC homeless Coordinated Entry, Foster Care, and domestic violence programs.

### Who Should Participate?

- Local government housing administrators
- Sub-recipient organizations involved in SHIP implementation
- Community partners
- Homeless assistance providers

### Key Topics:

- Priority attention for those with Developmental Disabilities
- Providing assistance with Rental, Rehabilitation, Purchase Assistance and other strategies
- Outreach and marketing
- Assisting homeless individuals

# THE REHABILITATION CONSTRUCTION PROCESS

JANUARY 19 – WEST PALM BEACH

Hilton Palm Beach, 150 Australian Avenue, West Palm Beach, FL 33406

The rehabilitation construction process requires knowledgeable program inspectors who understand the building codes, know the limits of your rehabilitation program, and can maintain a good working relationship with the homeowner and the contractor. This workshop, sponsored by the Florida Housing Finance Corporation's Affordable Housing Catalyst Program, will help you learn how to select a good housing inspector or give your inspector the tools needed to improve your rehab program, reduce complaints and minimize change orders.

## Who Should Attend?

- Housing program administrator
- Construction management staff
- Rehabilitation staff
- Planning staff
- Nonprofit sponsors involved in rehabilitation

## Key Topics:

- Finding a good inspector
- Mastering the Work Write Up
- Working with contractors
- Reducing Change Orders
- Handling disputes between the Owner and Contractor

# PLANNING, FINANCING AND DEVELOPING AFFORDABLE HOUSING FOR OWNERSHIP

FEBRUARY 25 – WINTER PARK

Winter Park Community Center, 721 W. New England Avenue, Winter Park, FL 32789

Financing new affordable homeownership units and preserving existing units are activities undertaken in virtually every Florida community. But how are these units made affordable? Why is it a challenge to build units prior to having a buyer? How can we tell if the units being built are affordable?

This one-day workshop will take the participant step-by-step through the process of developing housing for homeownership, including understanding the market and feasibility analysis, developing the construction budget, building a relationship with lenders and other critical partners, navigating the local government process and assembling financing. We'll cover common terms and basic underwriting issues unique to single family financing and we'll also touch on the Community Land Trust concept.

## Who Should Attend?

- Advanced Curriculum participants
- Nonprofit affordable housing developers (including those in need of capacity building)
- Local government housing administrators
- Local government elected officials
- Community partners

## Key Topics:

- Understanding the market
- Sources and uses
- Calculating affordability
- Community Land Trust Model
- Appraisals and other studies
- Construction and permanent financing
- Predevelopment site analysis
- Subdivision development
- Scattered site/infill development

# EMERGENCY REPAIR, REHABILITATION AND RECONSTRUCTION

MARCH 22 – FT. LAUDERDALE

Westin Ft. Lauderdale, 400 Corporate Drive, Ft. Lauderdale, FL 33334

This workshop, sponsored by the Florida Housing Finance Corporation's Affordable Housing Catalyst Program, will help you choose the best program for your local governments and combining other funding sources. The SHIP Program provides the flexibility for local programs to use SHIP dollars for different types of rehabilitation activities. SHIP administrators need to understand the difference between the different types of rehabilitation programs and ensure that you choose the best program for your community based on needs, staff capacity and funding availability. There are also critical compliance issues that occur when different funding sources are being combined to carry out these rehabilitation activities.

## Who Should Attend?

- Housing program administrator
- Construction management staff
- Rehabilitation staff
- Planning staff
- Nonprofit sponsors involved in rehabilitation

## Key Topics:

- Differences between energy repair, rehabilitation, and reconstruction
- Choosing the best program for your community
- Staff capacity for program administration
- Leveraging funding sources
- File documentation when leveraging resources
- Program compliance based on funding sources
- Identifying the strictest rule when combining resources



# ASSISTING AND MONITORING RENTAL HOUSING WITH SHIP

## APRIL 7 – BOCA RATON

Embassy Suites Boca Raton, 661 NW 53<sup>rd</sup> Street, Boca Raton, FL 33487

## APRIL 21 – PALM COAST

Hilton Garden Inn, 55 Town Center Blvd., Palm Coast, FL 32164

This workshop addresses the principles behind developing affordable rental housing. We will discuss new construction and rehabilitation for both large and small projects, from predevelopment to asset management. Learn what SHIP requires for ongoing monitoring of assisted rental units and how SHIP administrators can select the best projects for their community. The presenters will also discuss tax credit deals from a SHIP perspective to help participants understand the local government contribution.

### Who Should Attend?

- Local government housing administrators
- Local government elected officials
- Community partners
- Nonprofit affordable housing developers (including those in need of capacity building)
- Homeless Continuum of Care agencies and homeless assistance providers

### Key Topics:

- Understanding the market
- Planning and zoning
- Developer capacity
- Sources and uses
- Feasibility analysis
- Asset management
- Monitoring regulations

# REDUCING ENERGY COSTS FOR AFFORDABLE HOUSING

MAY 17 – ORLANDO

TBA

The SHIP Program provides an opportunity for local governments to provide cost saving energy improvements for homeowners. Weatherization programs provide an opportunity to leverage resources for energy improvements in single family homes. This workshop, sponsored by the Florida Housing Finance Corporation's Affordable Housing Catalyst Program, will help you learn about including Energy Star appliances to LEED certification as part of your rehabilitation program.

## Who Should Attend?

- Housing program administrator
- Construction management staff
- Rehabilitation staff
- Planning staff
- Nonprofit sponsors involved in rehabilitation
- Developers

## Key Topics:

- How to include energy efficiency in a rehab program
- How to leverage energy efficiency resources
- Energy star appliances
- Florida Green Building Programs
- LEED

# PREPARING FOR YOUR SHIP MONITORING VISIT

MAY 24 – CLEARWATER

Pinellas Realtor Organization, 4590 Ulmerton Road, Clearwater, FL 33762

Have you received notice that a Florida Housing Finance Corporation monitor will soon review your SHIP program? Don't get nervous—get prepared. This workshop will report results from an analysis of recent monitoring reports to help you prepare. Learn about the program details that SHIP monitors focus their attention on during their review of a SHIP jurisdiction. This may help you achieve the best outcome from your next monitoring visit. The training will outline SHIP rule compliance, as well as Florida Housing options for addressing non-compliance. Beyond discussing mere compliance, this training will help you perform a health and effectiveness "checkup" on your local SHIP program using diagnostic exercises and group projects.

## Who Should Attend?

- Housing program administrators
- Community partners
- Sub Recipient Organization staff

## Key Topics

- Steps in the monitoring process
- Common monitoring findings
- Elements of compliance: eligibility calculation, file documentation, reporting

# DEVELOPING AND PRESERVING RENTAL UNITS

JUNE 9 – ORLANDO

TBA

In this workshop we will provide an overview of the process for developing new rental housing and preserving existing units. Assisted rental housing is built with public subsidy and comes with restrictions on the rents that can be charged and the income of households served. When these restrictions expire, these affordable units are at risk for conversion to market rate units. Learn how to identify these vulnerable properties and the steps that can be taken to preserve their affordability.

We'll also cover site selection, assembling the development team, feasibility analysis and funding sources used to construct new affordable rental units and mechanisms to ensure their long term affordability.

## Who should attend?

- Nonprofit developers
- Local government staff
- Local government elected officials
- Community partners
- Homeless Continuums of Care and homeless assistance providers

## Key Topics:

- Overview of preservation potential in Florida
- Due diligence process
- Financing mechanisms
- Capital needs assessments
- Assembling the development team

# WEBINAR SCHEDULE

<b>OCTOBER 28</b> <b>10AM-11:30AM</b>	<b>AHAC WEBINAR</b>
<b>NOVEMBER 12</b> <b>10AM-11:30AM</b>	<b>DISASTER PREPAREDNESS AND RECOVERY</b>
<b>NOVEMBER 17</b> <b>2PM-3:30PM</b>	<b>COLLABORATION BETWEEN SHIP AND LOCAL GOVERNMENT PLANNING/REAL ESTATE DEPARTMENTS</b>
<b>DECEMBER 15</b> <b>10AM-11:30AM</b>	<b>EFFECTIVE WRITTEN AGREEMENTS</b>
<b>JANUARY 26</b> <b>10AM-11:30AM</b>	<b>LESSONS IN LEVERAGING</b>
<b>FEBRUARY 18</b> <b>2PM-3:30PM</b>	<b>ASSISTING VETERANS WITH SHIP</b>
<b>MARCH 17</b> <b>10AM-11:30AM</b>	<b>TAX CREDIT DEALS FROM A SHIP PERSPECTIVE</b>
<b>APRIL 12</b> <b>10AM-11:30AM</b>	<b>SHIP LOANS- RECAPTURE OPTIONS AND PORTFOLIO MANAGEMENT</b>
<b>MAY 26</b> <b>2PM-3:30PM</b>	<b>BEST PRACTICES FOR IMPLEMENTING A SHIP RAPID REHOUSING STRATEGY</b>
<b>JUNE 22</b> <b>2PM-3:30PM</b>	<b>WORKING WITH NON-PROFITS, SPONSOR AND SUB- RECIPIENTS</b>

# WEBINAR DESCRIPTIONS

## **AHAC WEBINAR – OCTOBER 28, 2015 – 10AM-11:30AM**

In 2016, half of all the SHIP jurisdictions will submit updated Local Housing Assistance Plans. They are also required by the SHIP statute to assemble an Affordable Housing Advisory Committee (AHAC) and complete a triennial Housing Incentive Strategies report. This webinar provides an introduction to housing incentives based on regulatory reform. Learn about the statutory requirements and deadlines entailed in assembling an 11 person committee and helping them write a report to be presented to your City or County Commission. Presenters will lead a review of sample AHAC reports as a participatory exercise. Key topics include guidance on specific incentive strategies that the AHAC is statutorily required to consider, including density bonuses and creation of a surplus land inventory. The training will offer other best practices to encourage Advisory Committee members to engage in policy discussions and write down procedures for implementation by staff.

## **DISASTER PREPAREDNESS AND RECOVERY – NOVEMBER 12, 2015 – 10AM-11:30AM**

The next hurricane season may be a full one—this is incentive enough to plan ahead so that SHIP can respond when the time comes. This webinar highlights the valuable role of SHIP staff in responding to past disasters. Lessons learned and best practices will be explored. The presenters will encourage you to give your SHIP disaster response plan a “Strategy Tune Up”. They will highlight disaster response assistance for rental housing, as well as homeownership units, including manufactured homes. Key topics will include SHIP staff’s roles as Second Responders and common disaster mitigation features.

## **COLLABORATION BETWEEN SHIP OFFICES AND LOCAL GOVERNMENT PLANNING/ REAL ESTATE DEPARTMENTS – NOVEMBER 17, 2015 – 2PM-3:30PM**

The construction and preservation of affordable housing is a function of planning and financing, and SHIP staff must work with planning staff. Every jurisdiction in Florida has duties under the Housing Element of the Comprehensive Plan to provide for affordable housing. Implementation of the housing element is carried out in part by the SHIP LHAP. Learn about LHAP provisions that are required to be carried out in coordination with planning department staff. The presenters will discuss the AHAC Report, another way that planning staff should intersect with the SHIP program. Collaboration between SHIP and local government planning/ real estate departments will result in a coordination of local planning

and financing efforts to produce more affordable housing and to produce affordable housing that best serves the identified needs of the community.

### **EFFECTIVE WRITTEN AGREEMENTS – DECEMBER 15, 2015 – 10AM-11:30AM**

Written agreements serve as the legally binding contract between two parties. The terms, conditions, affordability period, roles, responsibilities and enforcement mechanism and conditions for repayment must be included in the agreement in order for it to be enforceable. In the event of non-compliance by a homeowner, contractor, developer, sub recipients or sponsors, the agreement serves to protect the local government's investment of funds. Failure to include these conditions could make the local government responsible to pay back funds in the event of non-compliance. Learn what must be included in your agreements to protect the local government.

### **LESSONS IN LEVERAGING – JANUARY 26, 2016 – 10AM-11:30AM**

The staff in many SHIP communities work with other sources of federal and state housing funding alongside SHIP. How can you make all your monies work together to manage an efficient program and maximize the subsidies for your projects? The P in SHIP stands for Partnership, and the program was designed with the goal of leveraging and combining resources. This webinar provides guidance on synchronizing your funding sources, and monitoring what rules are triggered. The presenters will highlight key examples of how programs may work together despite having different rules.

### **ASSISTING VETERANS WITH SHIP – FEBRUARY 18, 2016 – 2PM-3:30PM**

This webinar offers guidance on how SHIP may help veterans obtain stable, affordable housing. Several options will be covered, including priority assistance with home purchase or owner-occupied rehabilitation, along with accessibility modifications for wounded veterans. The special needs of homeless Veterans will be addressed in a discussion of rent deposit assistance, rental rehabilitation, ongoing rent subsidies, and coordination with VASH vouchers. Learn what groups and agencies in your community may serve as your partners to identify and assist SHIP-eligible veterans.

### **TAX CREDIT DEALS FROM A SHIP PERSPECTIVE – MARCH 17, 2016 – 10AM-11:30AM**

Developers are constantly working to identify good rental projects for Housing Credit applications. Each application is incomplete without a local government contribution. Learn what is entailed in the local contribution and how SHIP may be involved. The presenters will offer tips on negotiating with developers as their development plan forms. Several examples of SHIP contributions will be highlighted and examined.

## **SHIP LOANS- RECAPTURE OPTIONS AND PORTFOLIO MANAGEMENT – APRIL 12, 2016 – 10AM-11:30AM**

SHIP assistance may be provided as a forgivable or deferred loan, as a loan requiring monthly payback, or even as a grant. The webinar examines the pros and cons of each recapture option. It provides a timeline for how applicants are informed of loan terms and when the loan is closed and recorded. Presenters will also address best practices for loan portfolio management.

## **BEST PRACTICES FOR IMPLEMENTING A SHIP RAPID REHOUSING STRATEGY – MAY 26, 2016 – 2PM-3:30PM**

*(NOTE: This training would be offered if the Legislature renews its efforts to authorize SHIP rent subsidies)*

For a second year, the Florida Legislature has authorized SHIP to provide up to a year of rent subsidies for applicants who are homeless and/or special needs applicants. Learn from the lessons of the first SHIP jurisdictions to establish a rapid rehousing SHIP strategy in coordination with their Continuum of Care agencies. The presenters will compare and contrast rent assistance programs for homeless applicants and for applicants with special needs. Key Topics include steps in the rental assistance process and the importance of case management.

## **WORKING WITH NON-PROFITS, SPONSORS AND SUB-RECIPIENTS – JUNE 22, 2016 – 2PM-3:30PM**

Several SHIP communities outsource implementation of one or more of their strategies. Learn what types of groups may serve as sponsors and sub-recipients. The presenters will highlight key examples of how SHIP work is effectively outsourced. The webinar will address service delivery fees and other details in a sub recipient agreement. Key topics include the elements of monitoring and effective communication.



# LUNCH & LEARN SCHEDULE

Lunch & Learn modules are webinar trainings of 20-30 minutes, each addressing a single issue topic. This series also creates a growing library of online recordings and archived training materials for ongoing reference. Each Lunch & Learn starts at Noon.

## ADMINISTRATIVE SERIES

<b>NOVEMBER 5</b>	<b>SUMMARY OF AHAC REPORT REQUIREMENTS</b>
<b>DECEMBER 10</b>	<b>A YEAR IN THE LIFE OF A SHIP ADMINISTRATOR</b>
<b>JANUARY 8</b>	<b>SET-ASIDE REQUIREMENTS FOR INCOME, CONSTRUCTION, HOMEOWNERSHIP AND SPECIAL NEEDS</b>
<b>JANUARY 12</b>	<b>COMMON ADMINISTRATIVE PITFALLS TO AVOID</b>
<b>FEBRUARY 9</b>	<b>MOVING FILES TO MEET SET-ASIDE REQUIREMENTS</b>
<b>FEBRUARY 23</b>	<b>MANAGING THE INTERNAL FINANCIAL PROCESS (TRACKING)</b>
<b>MARCH 8</b>	<b>NOTICE OF FUNDING AVAILABILITY AND WAITING LISTS</b>

## REHAB HOUSING SERIES

<b>OCTOBER 19</b>	<b>TIPS FOR FINDING A KNOWLEDGEABLE REHAB INSPECTOR</b>
<b>OCTOBER 26</b>	<b>MAINTAINING A GOOD WORKING RELATIONSHIP WITH THE HOMEOWNER AND CONTRACTOR</b>
<b>NOVEMBER 10</b>	<b>PROCESS FOR APPROVING CHANGE ORDERS</b>
<b>DECEMBER 1</b>	<b>PITFALLS TO AVOID IN THE REHABILITATION PROCESS</b>

## STRATEGIES SERIES

<b>JANUARY 6</b>	<b>EMERGENCY REPAIR, REHABILITATION AND RECONSTRUCTION</b>
<b>JANUARY 14</b>	<b>PURCHASE ASSISTANCE</b>
<b>JANUARY 28</b>	<b>DISASTER RECOVERY MANAGEMENT</b>
<b>FEBRUARY 15</b>	<b>RENTAL ASSISTANCE AND WHEN TO USE IT</b>
<b>FEBRUARY 29</b>	<b>INVESTING IN RENTAL DEVELOPMENTS IN YOUR COMMUNITY</b>
<b>MARCH 29</b>	<b>FORECLOSURE FILE MANAGEMENT AND COUNSELING</b>
<b>APRIL 5</b>	<b>PROGRAM INCOME, RECAPTURE TRACKING AND USE</b>

# LUNCH & LEARN TRAININGS

The Lunch and Learn series offers 20-30 minute webinar trainings, each covering a single issue or topic. The goal is to include a participatory exercise in each training, and to provide written materials for further learning. This training series also creates a growing library of online recordings and archived training materials for ongoing reference.

## **Administrative Series**

These trainings may be targeted to newer staff in SHIP jurisdictions that have not participated in the clinic series offered since May 2015. The series should include modules on topics like:

- A Year in the Life of a SHIP Administrator
- Notice of Funding Availability and Waiting Lists
- Common Administrative Pitfalls to Avoid
- Set-Aside Requirements for Income, Construction, Homeownership and Special Needs
- Moving Files to meet Set-Aside Requirements
- Summary of AHAC Report Requirements
- Managing the Internal Financial Process (tracking)

## **Strategies Series**

- Purchase Assistance
- Disaster Recovery Management
- Foreclosure File Management and Counseling
- Investing in Rental Developments in Your Community
- Rental Assistance and When to Use It
- Program Income, Recapture Tracking and Use
- Emergency Repair, Rehabilitation and Reconstruction

## **Rehab Housing Series**

These will reference the updated contractor's manual sent electronically to all participants.

- Tips for finding a knowledgeable rehab inspector
- Maintaining a good working relationship with the homeowner and contractor
- Process for approving change orders
- Pitfalls to avoid in the rehabilitation process

# LUNCH & LEARN DESCRIPTIONS

## **SUMMARY OF AHAC REPORT REQUIREMENTS – NOVEMBER 5, 2015 – NOON**

Learn about the statutory requirements for SHIP communities to assemble an Affordable Housing Advisory Committee (AHAC) and complete a triennial Housing Incentive Strategies report. The presenter will offer examples of housing incentives and sample reports. Learn about deadlines for assembling a committee, discussing policy, and writing a report.

## **A YEAR IN THE LIFE OF A SHIP ADMINISTRATOR – DECEMBER 10, 2015 – NOON**

Join us for a 30-minute conversation on the key deadlines that must be met by SHIP administrators throughout the year. Plan and prepare your timeline to ensure that program deadlines are met. The presenter will address the seasonal nature of some tasks, including annual reporting and monitoring rental housing and sub recipients.

## **SET-ASIDE REQUIREMENTS FOR INCOME, CONSTRUCTION, HOMEOWNERSHIP AND SPECIAL NEEDS – JANUARY 8, 2016 – NOON**

The set-asides are fundamental requirements for how to spend SHIP funds. Learn the details of the rules and a variety of ways that SHIP jurisdictions meet the requirements. This training will help you track compliance throughout the year to avoid problems when it is time to complete annual reports.

## **COMMON ADMINISTRATIVE PITFALLS TO AVOID – JANUARY 12, 2016 – NOON**

While the Coalition's trainings often highlight best practices, in this training you benefit from the mistakes of other communities. The presenter will identify how to prevent errors in file documentation, selecting applicants and local partners, eligibility qualification and more.

## **MOVING FILES TO MEET SET-ASIDE REQUIREMENTS – FEBRUARY 9, 2016 – NOON**

In many SHIP communities, the local housing trust fund contains money from more than one fiscal year at any point in time. This enables staff to choose the funding source that pays for a specific SHIP expenses. Occasionally you may discover non-compliance with set-asides compliance, which may be solved by re-assigning an expense from one SHIP funding source to another. Learn how to properly accomplished this and report the results.

## **MANAGING THE INTERNAL FINANCIAL PROCESS (TRACKING) – FEBRUARY 23, 2016 – NOON**

Every SHIP office is required to track the status of expenses, encumbrances, deadlines, demographics and more. Do not just rely on your finance department's records—they do not collect all the data required for annual reports. The presenter will review a SHIP tracking spreadsheet—available for free to all—and offer tips of successful tracking.

## **NOTICE OF FUNDING AVAILABILITY AND WAITING LISTS – MARCH 8, 2016 – NOON**

The SHIP monitors have recently identified several communities that do not comply with fundamental details required in the Notice of Funding Availability. Learn how to avoid this, and how to manage waiting lists for each of your SHIP strategies. The presenter will address the details of 'first qualified, first served' and various priorities used on waiting lists.

## **TIPS FOR FINDING A KNOWLEDGEABLE REHAB INSPECTOR – OCTOBER 19, 2015 – NOON**

Finding a knowledgeable rehabilitation inspector is crucial to the administration of a good rehabilitation program. Find out what qualities, education and background will help to improve your rehab program.

## **MAINTAINING A GOOD WORKING RELATIONSHIP WITH THE HOMEOWNER AND CONTRACTOR – OCTOBER 26, 2015 – NOON**

Good communication, clear written agreements, and clarity of roles are important in the day to day administration of a rehabilitation program. Learn how to improve communication and interaction between all parties involved in the rehabilitation process.

## **PROCESS FOR APPROVING CHANGE ORDERS – NOVEMBER 10, 2015 – NOON**

Is your program processing too many change orders? Find out how to improve your process to help reduce the number of change orders under your rehabilitation program.

## **PITFALLS TO AVOID IN THE REHABILITATION PROCESS – DECEMBER 1, 2015 – NOON**

Identify and learn how to prevent common problems that can hinder a successful rehabilitation program, including unclear specifications, poorly written agreements and bad contractors. Share your success and failures with other SHIP administrators in this 30 minute lunch and learn series.

## **EMERGENCY REPAIR, REHABILITATION AND RECONSTRUCTION – JANUARY 6, 2016 – NOON**

Choosing how to use your SHIP funds for rehabilitation is based on several factors. Staffing, funding and community needs should be considered in your funding decisions. Join us for a conversation on choosing the best program for your community.

## **PURCHASE ASSISTANCE – JANUARY 14, 2016 – NOON**

Learn about the fundamentals of providing SHIP assistance to homebuyers, including how to reduce your workload by using lenders and Realtors to help carry out your program. Underwrite your loans to ensure that you provide gap financing to buyers. Leverage other resources when providing assistance.

## **DISASTER RECOVERY MANAGEMENT – JANUARY 28, 2016 – NOON**

SHIP staff play a valuable role in recovering to disasters. The presenter will review a sample disaster strategy and share best practices and lessons learned from past disasters. Learn about disaster response assistance for rental housing and for homeownership units, including manufactured homes.

## **RENTAL ASSISTANCE AND WHEN TO USE IT – FEBRUARY 15, 2016 – NOON**

Learn how to develop and manage a rental assistance program using SHIP. The presenter will discuss how to partner with members of Continuums of Care and service organizations that work with Homeless and extremely low income households in need.

## **INVESTING IN RENTAL DEVELOPMENT IN YOUR COMMUNITY – FEBRUARY 29, 2016 – NOON**

SHIP is often used to fill financing gaps in affordable rental developments as well as provide the local government contribution for Low Income Housing Tax Credit projects. Learn from SHIP Administrators about their process for selecting good projects and fulfilling rental monitoring requirements.

## **FORECLOSURE FILE MANAGEMENT AND COUNSELING – MARCH 29, 2016 – NOON**

In recent years, an increasing number of SHIP jurisdictions have provided SHIP-funded foreclosure prevention assistance. Learn how the combination of financial assistance and counseling contributes to strategy success. The presenter will discuss eligibility considerations, since assistance is generally for homeowners who have recovered from a temporary loss of income.

## **PROGRAM INCOME, RECAPTURE TRACKING AND USE – APRIL 5, 2016**

While the SHIP allocation is often your largest source of SHIP revenue, program income and recaptured funds are additional sources that must be properly tracked and expended. Learn to distinguish recaptured funds from a variety of types of program income. Participants will share their own practices and review procedures from other communities.