

FY  
2016 -  
2017



# Training Schedule 2016-2017

**SPONSORED BY THE STATE OF FLORIDA, THROUGH THE FLORIDA HOUSING FINANCE CORPORATION'S AFFORDABLE HOUSING CATALYST PROGRAM**



# OVERVIEW OF FY 2016-2017 CATALYST TRAININGS

DATE	TRAINING	PAGE
July 19, 2016	<b>Webinar:</b> Preparing and Submitting the Annual Report	<b>22</b>
July 25, 2016	<b>Webinar:</b> Preparing and Submitting the Annual Report (provided again)	<b>22</b>
August 2, 2016	<b>Webinar:</b> Special Needs Assistance with SHIP Funds	<b>22</b>
August 9, 2016	<b>Workshop:</b> Affordable Housing Funding Sources	<b>5</b>
August 30, 2016	<b>Workshop:</b> Proficiency in Income Qualification	<b>6</b>
September 7, 2016	<b>Webinar:</b> Reducing Energy Costs for Affordable Housing	<b>23</b>
September 27, 2016	<b>Workshop:</b> The Rehabilitation/Emergency Repair Construction Process	<b>7</b>
October 5, 2016	<b>Workshop:</b> LHAP Preparation and Strategy Design	<b>8</b>
October 13, 2016	<b>Webinar:</b> Financial Management for Nonprofits	<b>23</b>
October 26, 2016	<b>Workshop:</b> Enhancing Nonprofit Capacity for Providing Affordable Housing Assistance	<b>9</b>
October 27, 2016	<b>Webinar:</b> LHAP Strategy Design and Amendments	<b>23</b>
November 1, 2016	<b>Workshop:</b> Community Land Trusts	<b>10</b>
November 9, 2016	<b>Webinar:</b> Innovative Affordable Housing Building Methods	<b>24</b>
November 15, 2016	<b>Workshop:</b> The Predevelopment Process	<b>11</b>
November 16, 2016	<b>Webinar:</b> Effective Written Agreements	<b>24</b>
December 1, 2016	<b>Webinar:</b> Best Practices for Serving on a Housing Nonprofit Board	<b>24</b>



<b>DATE</b>	<b>TRAINING</b>	<b>PAGE</b>
December 6, 2016	<b>Workshop:</b> Successful Purchase Assistance Strategies	<b>12</b>
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December 15, 2016	<b>Webinar:</b> Working with Nonprofits, Sponsors and Sub Recipients	<b>25</b>
January 11, 2017	<b>Webinar:</b> Preparing for Your SHIP Monitoring Visit	<b>25</b>
January 12, 2017	<b>Workshop:</b> Financing and Monitoring Rental Housing with SHIP	<b>14</b>
January 25, 2017	<b>Webinar:</b> Successful Strategic Planning for Nonprofit Leaders	<b>25</b>
February 2, 2017	<b>Workshop:</b> The Development Process	<b>15</b>
February 15, 2017	<b>Webinar:</b> Preparing for Your SHIP Monitoring Visit (provided again)	<b>25</b>
February 16, 2017	<b>Workshop:</b> SHIP Incentives Strategies and the AHAC	<b>16</b>
February 28, 2017	<b>Webinar:</b> How to Adopt an Affordable Housing Advisory Committee (AHAC) Report	<b>26</b>
March 6, 2017	<b>Webinar:</b> Special Needs Assistance with SHIP Funds (provided again)	<b>22</b>
March 7, 2017	<b>Workshop:</b> Requirements for Successfully Obtaining the CHDO Designation	<b>17</b>
March 14, 2017	<b>Webinar:</b> Best Practices for Implementing a Rapid Rehousing Strategy, Part 1	<b>26</b>
March 28, 2017	<b>Webinar:</b> Best Practices for Implementing a Rapid Rehousing Strategy, Part 2	<b>26</b>
April 5, 2017	<b>Workshop:</b> New Construction Strategies and Partnerships	<b>18</b>
April 19, 2017	<b>Webinar:</b> Income Qualification Considerations when Working with Homeless Applicants	<b>27</b>
April 25, 2017	<b>Webinar:</b> Forming a Successful Homeless-Related Regional Partnership	<b>27</b>
May 4, 2017	<b>Workshop:</b> The Credit Underwriting Process for Affordable Housing	<b>19</b>



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May 9, 2017	<b>Webinar:</b> Income Certification for SHIP Applicants	<b>27</b>
May 18, 2017	<b>Webinar:</b> Income Certification for SHIP Applicants (provided again)	<b>27</b>
May 25, 2017	<b>Workshop:</b> Affordable Housing Funding Sources (provided again)	<b>5</b>



# WORKSHOP SCHEDULE

<ul style="list-style-type: none"> <li>• <b>AUGUST 9</b> West Palm Beach</li> <li>• <b>MAY 25</b> Tampa</li> </ul>	<b>AFFORDABLE HOUSING FUNDING SOURCES</b>
<ul style="list-style-type: none"> <li>• <b>AUGUST 30</b> Orlando</li> </ul>	<b>PROFICIENCY IN INCOME QUALIFICATION</b>
<ul style="list-style-type: none"> <li>• <b>SEPTEMBER 27</b> Tampa</li> </ul>	<b>THE REHABILITATION/EMERGENCY REPAIR CONSTRUCTION PROCESS</b>
<ul style="list-style-type: none"> <li>• <b>OCTOBER 5</b> Ocala</li> </ul>	<b>LHAP PREPARATION AND STRATEGY DESIGN</b>
<ul style="list-style-type: none"> <li>• <b>OCTOBER 26</b> Orlando</li> </ul>	<b>ENHANCING NONPROFIT CAPACITY FOR PROVIDING AFFORDABLE HOUSING ASSISTANCE</b>
<ul style="list-style-type: none"> <li>• <b>NOVEMBER 1</b> Ft. Lauderdale</li> </ul>	<b>COMMUNITY LAND TRUSTS</b>
<ul style="list-style-type: none"> <li>• <b>NOVEMBER 15</b> Palm Coast</li> </ul>	<b>THE PREDEVELOPMENT PROCESS</b>
<ul style="list-style-type: none"> <li>• <b>DECEMBER 6</b> West Palm Beach</li> </ul>	<b>SUCCESSFUL PURCHASE ASSISTANCE STRATEGIES</b>
<ul style="list-style-type: none"> <li>• <b>DECEMBER 8</b> Orlando</li> </ul>	<b>AVOIDING AND OVERCOMING NIMBY OPPOSITION TO AFFORDABLE HOUSING</b>
<ul style="list-style-type: none"> <li>• <b>JANUARY 12</b> Jacksonville</li> </ul>	<b>FINANCING AND MONITORING RENTAL HOUSING WITH SHIP</b>
<ul style="list-style-type: none"> <li>• <b>FEBRUARY 2</b> Deerfield Beach</li> </ul>	<b>THE DEVELOPMENT PROCESS</b>
<ul style="list-style-type: none"> <li>• <b>FEBRUARY 16</b> Ocala</li> </ul>	<b>SHIP INCENTIVE STRATEGIES AND THE AHAC</b>
<ul style="list-style-type: none"> <li>• <b>MARCH 7</b> Jacksonville</li> </ul>	<b>REQUIREMENTS FOR SUCCESSFULLY OBTAINING THE CHDO DESIGNATION</b>
<ul style="list-style-type: none"> <li>• <b>APRIL 5</b> West Palm Beach</li> </ul>	<b>NEW CONSTRUCTION STRATEGIES AND PARTNERSHIPS</b>
<ul style="list-style-type: none"> <li>• <b>MAY 4</b> Tampa</li> </ul>	<b>THE CREDIT UNDERWRITING PROCESS FOR AFFORDABLE HOUSING</b>



# WORKSHOP DESCRIPTIONS

## AFFORDABLE HOUSING FUNDING SOURCES

AUGUST 9 – WEST PALM BEACH

CareerSource Palm Beach County, 3400 Belvedere Rd., West Palm Beach 33406

MAY 25 – TAMPA

Hilton Tampa Airport Westshore, 2225 Lois Ave., Tampa 33607

This workshop provides an overview of funding, including SHIP, SAIL, CDBG, HOME, HOPWA, ESG, HUD CoC, LIHTC, Hardest Hit and other funding sources. Presenters will provide an overview of where these sources come from, how they are allocated and distributed, and their allowable uses and advocacy. Participants will build on that knowledge and discuss how these funds could be leveraged in different scenarios. The training is designed for SHIP administrators, other local government housing staff, and nonprofit organizations. This session is a must for those new to the world of affordable housing.

### Who Should Attend?

- Nonprofit affordable housing developers
- Local government housing administrators
- Community partners

### Key Topics:

- Federal Funding
- State Funding
- Private sources and community partnerships
- Advocacy



# PROFICIENCY IN INCOME QUALIFICATION

AUGUST 30 – ORLANDO

DoubleTree by Hilton Orlando Downtown, 60 S. Ivanhoe Blvd., Orlando 32804

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

## Key Topics:

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



# THE REHABILITATION/EMERGENCY REPAIR CONSTRUCTION PROCESS

SEPTEMBER 27 – TAMPA

Hilton Tampa Airport Westshore, 2225 Lois Ave., Tampa 33607

The rehabilitation construction process requires knowledgeable program inspectors who understand the building codes, know the limits of the rehabilitation program, and can maintain a good working relationship with the homeowner and the contractor. This workshop will help participants learn how to select a good housing inspector or give an inspector the tools needed to improve rehab programs, reduce complaints and minimize change orders. The SHIP Program provides the flexibility for local programs to use SHIP dollars for different types of rehabilitation activities. Learn the difference between the different types of rehabilitation programs to ensure that you choose the best program for your community based on needs, staff capacity and funding availability. The presenter will also address critical compliance issues that occur when different funding sources are being combined to carry out these rehabilitation activities.

## Who Should Participate?

- 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
- 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





# LHAP PREPARATION AND STRATEGY DESIGN

OCTOBER 5 – OCALA

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

This workshop addresses the fundamentals of implementing the LHAP as required by SHIP. The training is strongly recommended for staff with LHAPs due in 2017. It focuses on requirements for completing the plan and assessing what improvements will benefit a local government's housing strategies. The guidance from this workshop will help SHIP administrators adjust, adapt, and be successful in the LHAP submittal and approval process. The presenters will look beyond a list of rules and regulations to help participants understand the basis and reasoning for program requirements. This deeper knowledge will help participants as they consider how to update their process or strategies. Key Topics will include preparing the AHAC Report and tuning up your housing strategies in a changing market.

The presenters will help you write a SHIP Local Housing Assistance Plan (LHAP) that is clear, concise and complies with all requirements. 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.

## 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 the Affordable Housing Advisory Committee (AHAC)

## 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



# ENHANCING NONPROFIT CAPACITY FOR PROVIDING AFFORDABLE HOUSING ASSISTANCE

OCTOBER 26 – ORLANDO

DoubleTree by Hilton Orlando Downtown, 60 S. Ivanhoe Blvd., Orlando 32804

Managing a high-performing nonprofit involves focusing on how things operate, and how they might work more effectively. This workshop is designed for those interested in organizational capacity and health, including executive directors, senior staff, board members, and local government staff working with nonprofits. The presenters will explore several facets of nonprofit capacity, including resource, organizational, political, programmatic, and networking capacity. The training will help participants identify what factors can boost nonprofit performance, addressing topics like staffing and strategic planning. In addition, the trainings will discuss board of directors' composition and fiduciary responsibilities, to help distinguishing between board and staff responsibilities. Participants will learn how to evaluate a nonprofit's financial strength by examining the documents that must be reviewed.

## Who Should Attend?

- Staff at housing nonprofit organizations
- Local government housing administrators;
- Sub Recipient organizations involved in SHIP implementation
- Community partners

## Key Topics:

- Leader transitions
- Financial policies, reporting, budgeting, and evaluation
- The life stages of nonprofits
- Managing for performance outcomes
- Rules for Effective Advocacy
- How nonprofits adapt and respond to changing business requirements, market environments, and stakeholder expectations.
- Identifying what factors can boost nonprofit performance
- Staffing and strategic planning
- Board of directors' composition and fiduciary responsibilities
- Understanding board and staff responsibilities



# COMMUNITY LAND TRUSTS

NOVEMBER 1 – FORT LAUDERDALE

The Westin Fort Lauderdale, 400 Corporate Dr., Ft. Lauderdale 33334

This workshop explains what a community land trust is, how it works, and what role it plays in retaining SHIP subsidy to keep housing affordable forever. Community land trust homeownership is an alternative form of homeownership and an alternative to renting. Community land trusts are especially attractive in high cost housing markets, with tight rental markets. The CLT form of homeownership provides an important tool for local governments trying to meet the continuum of housing needs. A household can move from rental housing, freeing up that rental unit for another tenant, as they move into a form of homeownership that helps them to save and ready themselves for fee simple homeownership. The SHIP assistance that is provided to the CLT homebuyer is used for the benefit of the next CLT home buyer who is able to purchase the home at an affordable price. This workshop will teach the mechanics of how this is done. We will provide the sample SHIP strategy from the Florida Community Land Trust Institute’s CLT Primer and will highlight several critical pieces in a successful CLT program, such as CLT Homebuyer counseling, ground lease provisions, and best practices for resale. We will also include the topic of “surplus lands” because key to the success of a CLT is having land donated to the nonprofit.

## Who Should Attend?

- Local government housing administrators
- Community partners
- Elected officials and Affordable Housing Advisory Committee members
- Nonprofit housing staff

## Key Topics:

- Choices in setting up a CLT including board structure options
- Walking through a sample SHIP strategy
- How to incorporate CLT Homebuyer counseling
- Understanding the Ground lease provisions
- The role of the local government in supporting a CLT, including a review of “surplus lands” law
- Best practices for stewardship
- Best practices for resale



# THE PREDEVELOPMENT PROCESS

NOVEMBER 15 – PALM COAST

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

Predevelopment is one of the most important components of housing development. This training provides guidance to non-profit organizations on predevelopment and due diligence required in order evaluate project feasibility. It is designed to complement the Affordable Housing Funding Sources workshop. Presenters will cover site acquisition, construction/design, zoning, budgeting and other elements of the predevelopment process. We will discuss Florida Housing Finance Corporation's Predevelopment Loan Program and the requirements and walk through the process for obtaining a loan. Sometimes it is a necessity to find a development partner for a joint venture. The presenters will address how to evaluate a potential development partner, how to divide up the work, and ways to divide the fee. Examples of successful partnerships will also be covered.

## Who Should Attend?

- Housing program administrator
- Construction management staff
- Planning staff
- Nonprofit housing developers

## Key Topics:

- Predevelopment for Infill Development
- Predevelopment for Large Deals
- The Market
- Site selection
- Local Government Requirements
- Site Plans
- Engineering
- Members of the Development Team



# SUCCESSFUL PURCHASE ASSISTANCE STRATEGIES

DECEMBER 6 – WEST PALM BEACH

Embassy Suites West Palm Beach, 1601 Belvedere Rd., West Palm Beach 33406

A majority of SHIP funds must be expended for homeownership activities. No surprise then that homebuyer assistance is one of the most common strategies employed by local governments. This workshop is for local government housing staff and their community partners interested in developing, implementing, and managing a successful purchase assistance strategy. It will detail aspects of the process, from application to closing, including a review of the mortgage application process. Partnerships are key to success, so the workshop offers guidance on how to create long-term partnerships with developers, lenders, and Realtors. Also, the benefits of working with housing counseling agencies will be examined as part of a review of common topics included in a pre-purchase educational curriculum. Learn what factors to consider for program implementation, including how to plan for continued affordability, and how to adjust programs based on changes in the housing market. The presenters will offer key policy considerations about whom to assist with how much subsidy.

## Who Should Attend?

- Housing program administrators
- Nonprofit sponsors involved in purchase assistance

## Key Topics:

- First time buyer or not?
- Forms of SHIP assistance
- Including rehabilitation with purchase
- Post-purchase counseling topics



# AVOIDING AND OVERCOMING NIMBY OPPOSITION TO AFFORDABLE HOUSING

DECEMBER 8 – ORLANDO

Hyatt Regency Orlando Int'l Airport, 9300 Jeff Fuqua Blvd., Orlando 32827

This training is designed to help communities develop and preserve affordable housing by avoiding the opposition that too often thwarts development of affordable housing. The Florida Housing Coalition, with funding from the FHFC Catalyst Program, has recently published the third edition of *Creating Inclusive Communities in Florida*, a guidebook on avoiding and overcoming neighborhood opposition. The book will be used as training material for the workshop and each participant will receive a copy. This workshop will train from both the public sector perspective and the private developer perspective. While the *Creating Inclusive Communities* book is written for the audience of elected officials and key local government staff, this workshop will also address avoiding and overcoming neighborhood opposition from the developer's perspective, providing the roadmap for what a developer or advocate should do to avoid opposition and also what steps to take if local government has denied development rights based on neighborhood opposition.

## Who Should Attend?

- Affordable housing developers
- Affordable housing advocates including legal services
- Local government housing administrators and planning department staff
- Elected officials and county and city administrators
- Affordable Housing Advisory Committee members
- Community partners, including business community
- Nonprofit housing staff

## Key Topics

- What the general public and decision makers need to know about affordable housing, such as how it is developed; who lives in affordable housing; why it is a community asset
- The importance of design
- Best practices for addressing neighborhood concerns
- Best practices for conducting public hearings
- Legal requirements for affordable housing
- The connection between affordable housing and fair housing
- Administrative process for resolving land use/property rights issues



# FINANCING AND MONITORING RENTAL HOUSING WITH SHIP

JANUARY 12 – JACKSONVILLE

Embassy Suites Jacksonville Baymeadows, 9300 Baymeadows Rd., Jacksonville 32256

This workshop addresses the principles behind developing/financing affordable rental housing. The challenges and opportunities of both new construction and rehabilitation will be covered, as will small, scattered site deals and large scale developments. Learn what SHIP requires for ongoing monitoring of assisted rental units. The presenters will discuss tax credit deals from a SHIP perspective to help participants understand the local government obligation for monitoring. Key topics include understanding the market, sources and uses, and calculating affordability.

## Who should attend?

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

## Key Topics:

- Understanding the market
- Planning and Zoning
- Developer Capacity
- Sources and uses
- Feasibility analysis
- Asset management
- Monitoring regulations



# THE DEVELOPMENT PROCESS

## FEBRUARY 2 – DEERFIELD BEACH

DoubleTree by Hilton Hotel Deerfield Beach, 100 Fairway Dr., Deerfield Beach 33441

Affordable housing production is the goal of many of Florida's housing programs, and this workshop provides the participants with an introduction to the housing development process from the point of view of the developer. It is designed for nonprofit developers, housing program administrators, and their community partners. The presenter will address land use, impact fees, permitting, platting and more. Understanding the development process, as well as the costs and financing needed to make affordable housing production happen, will enable housing administrators to design effective affordable housing programs. Participants will also gain a better understanding of how amounts and timing of subsidies directly influence the incomes of the families being served. Key topics include financing, site selection, and how housing is made affordable.

### Who should attend?

- Housing program administrator
- Construction management staff
- Planning staff
- Nonprofit housing developers

### Key Topics:

- Market Analysis
- The Development Team
- Development of In-Fill for Home Ownership
- Development of Rental Housing
- Identifying sites
- Local Government Requirements
- Infrastructure
- Title Issues





# SHIP INCENTIVE STRATEGIES AND THE AHAC

FEBRUARY 16 – OCALA

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

This workshop provides guidance on the required incentive strategies as well as other incentives used by local governments throughout the state. It is a statutory requirement to assemble an Affordable Housing Advisory Committee (AHAC) and complete a triennial Housing Incentive Strategies report. Only those receiving \$350,000 or less are exempt. This workshop addresses housing incentives based on regulatory reform. Participants will learn about statutory requirements and deadlines, and about legislative changes affecting AHAC membership. The presenters will discuss the process for developing and submitting the required report. The presenters will provide guidance on specific incentive strategies that the AHAC is statutorily required to consider, including density bonuses and creation of a surplus land inventory.

## Who should attend?

- Housing program administrators, especially those with 2017 LHAPs due
- Staff responsible for completing the LHAP
- Staff responsible for convening AHAC committee

## Key Topics:

- Benefits of housing incentive strategies
- Incentive Strategies adopted in Florida's communities
- Elements of the Incentive Strategies Report



# REQUIREMENTS FOR SUCCESSFULLY OBTAINING THE CHDO DESIGNATION

MARCH 7 – JACKSONVILLE

Embassy Suites Jacksonville Baymeadows, 9300 Baymeadows Rd., Jacksonville 32256

This workshop addresses the benefits of becoming a Community Housing Development Organization (CHDO), as well as the requirements for maintaining that status. The training is designed for nonprofits interested in the CHDO designation and local government staff interested in working with CHDOs, as well as current CHDOs. The presenter will provide an overview of the HOME rules and regulations. This workshop will help CHDO staff navigate their way to success in a changing environment that is placing increasing pressure to perform in the HOME program. This training will also help CHDOs and their Participating Jurisdiction (PJ) partners develop strategies to build and demonstrate the capacity needed to maintain CHDO status and receive HOME CHDO set-aside funds.

## Who should attend?

- Nonprofit housing developers
- Nonprofit staff interested in the CHDO designation
- Local government housing program administrators

## Key Topics:

- CHDO eligible activities,
- CHDO board composition,
- Predevelopment,
- Underwriting,
- Subsidy layering
- Starting a HOME Consortium



# NEW CONSTRUCTION STRATEGIES AND PARTNERSHIPS

APRIL 5 – WEST PALM BEACH

Embassy Suites West Palm Beach, 1601 Belvedere Rd., West Palm Beach 33406

The SHIP program provides opportunities for local governments to develop single family homes while working with developers and sponsors. Designing a strategy in your Local Housing Assistance Plan that meets the SHIP requirements is an important first step in this process. Come learn how to solicit sponsors and developers, how to structure your program, how to develop effective agreements, and how to outline responsibilities to comply with SHIP program requirements. The presenters will examine sample construction strategies to highlight options for the terms of assistance and for selecting eligible buyers. The training will address how to partner, monitor construction, and show the benefit to the homebuyer.

## Who should attend?

- Local government housing administrators
- Community partners
- Nonprofit affordable housing developers

## Key Topics:

- Identifying potential partners
- Members on the Development Team
- Elements of the Contract with the Developer



# THE CREDIT UNDERWRITING PROCESS FOR AFFORDABLE HOUSING

MAY 4 – TAMPA

Hilton Tampa Airport Westshore, 2225 Lois Ave., Tampa 33607

Affordable housing development has many moving parts and the successful completion of credit underwriting within the prescribed timeframes is one of the most important. This workshop will help you better understand your predevelopment and due diligence responsibilities as a housing developer even before you formally apply for financing or respond to a funding proposal. We will review the underwriting process and discuss the documents that will be required. Through the use of real case studies, participants will gain a greater understanding of how to assess project feasibility, financing and operations. The guidance from this training will help nonprofit developers understand project timelines and successfully navigate the credit underwriting process.

## Who should attend?

- Nonprofit affordable housing developers
- Local government housing administrators
- Community partners

## Key Topics:

- Market acceptability,
- Development Economics,
- Developer and Contractor Experience,
- Management Leasing Experience,
- Guarantors financial and credit capacity,
- Third Party Reports,
- Transaction Structuring



# WEBINAR SCHEDULE

<p><b>JULY 19</b> 2PM-3:30PM</p> <p><b>JULY 25</b> 2PM-3:30PM</p>	<p><b>PREPARING AND SUBMITTING THE ANNUAL REPORT</b></p>
<p><b>AUGUST 2</b> 10AM-11:30AM</p> <p><b>MARCH 6</b> 2PM-3:30PM</p>	<p><b>SPECIAL NEEDS ASSISTANCE WITH SHIP FUNDS</b></p>
<p><b>SEPTEMBER 7</b> 10AM-11:30AM</p>	<p><b>REDUCING ENERGY COSTS FOR AFFORDABLE HOUSING</b></p>
<p><b>OCTOBER 13</b> 2PM-3:30PM</p>	<p><b>FINANCIAL MANAGEMENT FOR NONPROFITS</b></p>
<p><b>OCTOBER 27</b> 10AM-11:30AM</p>	<p><b>NEW LHAP STRATEGY DESIGN AND AMENDMENTS</b></p>
<p><b>NOVEMBER 9</b> 2PM-3:30PM</p>	<p><b>INNOVATIVE AFFORDABLE HOUSING BUILDING METHODS</b></p>
<p><b>NOVEMBER 16</b> 10AM-11:30AM</p>	<p><b>EFFECTIVE WRITTEN AGREEMENTS</b></p>
<p><b>DECEMBER 1</b> 2PM-3:30PM</p>	<p><b>BEST PRACTICES FOR SERVING ON A HOUSING NONPROFIT BOARD</b></p>
<p><b>DECEMBER 15</b> 2PM-3:30PM</p>	<p><b>WORKING WITH NONPROFITS, SPONSOR AND SUB RECIPIENTS</b></p>
<p><b>JANUARY 11</b> 2PM-3:30PM</p> <p><b>FEBRUARY 15</b> 2PM-3:30PM</p>	<p><b>PREPARING FOR YOUR SHIP MONITORING VISIT</b></p>
<p><b>JANUARY 25</b> 2PM-3:30PM</p>	<p><b>SUCCESSFUL STRATEGIC PLANNING FOR NONPROFIT LEADERS</b></p>
<p><b>FEBRUARY 28</b> 10AM-11:30AM</p>	<p><b>HOW TO ADOPT AN AFFORDABLE HOUSING ADVISORY COMMITTEE (AHAC) REPORT</b></p>
<p><b>MARCH 14</b> 2PM-3:30PM</p>	<p><b>BEST PRACTICES FOR IMPLEMENTING A RAPID RE-HOUSING STRATEGY (PART I)</b></p>



<b>MARCH 28</b> <b>2PM-3:30PM</b>	<b>BEST PRACTICES FOR IMPLEMENTING A RAPID RE-HOUSING STRATEGY (PART II)</b>
<b>APRIL 19</b> <b>2PM-3:30PM</b>	<b>INCOME QUALIFICATION CONSIDERATIONS WHEN WORKING WITH HOMELESS APPLICANTS</b>
<b>APRIL 19</b> <b>2PM-3:30PM</b>	<b>FORMING A SUCCESSFUL HOMELESS-RELATED REGIONAL PARTNERSHIP</b>
<b>MAY 9</b> <b>10AM-11:30AM</b> <b>MAY 18</b> <b>10AM-11:30AM</b>	<b>INCOME CERTIFICATION FOR SHIP APPLICANTS</b>



# WEBINAR DESCRIPTIONS

## **PREPARING AND SUBMITTING THE ANNUAL REPORT**

**JULY 19, 2016 – 2PM-3:30PM**

**JULY 25, 2016 – 2PM-3:30PM**

This webinar will provide guidance on proper preparation of the SHIP annual report, highlighting changes to the online reporting system and common errors made on the report. The training is especially designed to help new SHIP staff members who have recently been assigned tracking or annual reporting responsibilities. Learn how to access and use the SHIP annual report website, and how to locate the data to record in the reports. The presenter will discuss certification procedures and the tracking of expenditures, demographics, deadlines and more.

## **SPECIAL NEEDS ASSISTANCE WITH SHIP FUNDS**

**AUGUST 2, 2016 – 10AM-11:30AM**

**MARCH 6, 2017 – 2PM-3:30PM**

Have you spent 20 percent or more of your recent SHIP funds in compliance with the Special Needs set-aside? Do you wonder if there are other ways to assist special needs applicants? Does a homeless person meet the definition of Special Needs? What kind of special needs strategy could you add to your LHAP?

These questions are all answered by this on-line training, which is sponsored by the Florida Housing Finance Corporation's Affordable Housing Catalyst Program. It will help housing administrators develop strategies to expend the required 20 percent of the SHIP allocation to serve persons with special needs. 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. The presenters will highlight successful initiatives from SHIP communities involving assistance with rental housing, home repair, purchase assistance, and more. The training will help you fine tune your plan to comply with the special needs requirement in a timely fashion.



## **REDUCING ENERGY COSTS FOR AFFORDABLE HOUSING**

**SEPTEMBER 7, 2016 – 10AM-11:30AM**

The SHIP Program rule requires that you include in your LHAP initiatives involving current and emerging green building and design techniques. This training addresses techniques that may be integrated into SHIP strategies to promote greater affordability and housing sustainability. Learn about cost saving energy improvements that can be easily incorporated into your housing programs. Weatherization programs also provide an opportunity to leverage resources for energy improvements in single family homes. As the presenters discuss Florida Green Building programs, they will offer examples of techniques and products, including Energy Star appliances.

## **FINANCIAL MANAGEMENT FOR NONPROFITS**

**OCTOBER 13, 2016 – 2PM-3:30PM**

Good fiscal management policies and procedures are important to every business, and nonprofit businesses are no exception. A clean audit and sound financials are often key to successful loan and grant applications. We will explore financial management industry standards and tools you can use to ensure your financial house is in order. Presenters will discuss budgeting, monthly reporting for the Board of Directors, and the importance of internal controls and financial oversight, as well as developing solid financial policies to ensure accountability. We will review how to generate useful financial reports and how to interpret those reports. The importance of tracking income and expenditures by funding source, grant, or contract will be discussed as a component of grant management, compliance, and reporting.

## **NEW LHAP STRATEGY DESIGN AND AMENDMENTS**

**OCTOBER 27, 2016 – 10AM-11:30AM**

This webinar provides guidance on new strategies and amendments and the considerations of what should be included when updating or changing the LHAP. Learn how to write a SHIP strategy that is clear, concise and complies with all requirements. The training will highlight details in the current version of the LHAP template and offer instructions on making updates to the Housing Delivery Goals Chart or other LHAP Exhibits. Learn best practices to ensure quick approval of your new or updated strategy, as well as common mistakes to avoid.





## **INNOVATIVE AFFORDABLE HOUSING BUILDING METHODS**

**NOVEMBER 9, 2016 – 2PM-3:30PM**

This webinar will survey innovative housing building methods and approaches. Find out about alternative approaches to block and stick built housing. The presenters will look at examples of each and discuss the population they serve, with attention to affordability, hurricane resistance, and other properties. This training is designed for SHIP administrators and other Housing staff, along with planners, and nonprofit developers.

## **EFFECTIVE WRITTEN AGREEMENTS**

**NOVEMBER 16, 2016 – 10AM-11:30AM**

Written agreements (interlocal, sub recipient, contracts, work write-ups, etc.) 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 agreements to protect the local government.

## **BEST PRACTICES FOR SERVING ON A HOUSING NONPROFIT BOARD**

**DECEMBER 1, 2016 – 2PM-3:30PM**

This is the first of a two-part webinar series beneficial for board members who are less likely to travel to workshops. Nonprofit board members determine their organization's mission, and guide the organization in achieving that mission effectively and efficiently. Each board member must manage a wide variety of critical issues related to mission, fiduciary responsibilities, staffing, business development, and more. This training will provide board members with knowledge and tools to improve their ability to lead their nonprofits and ensure their continued strength. Key topics will include oversight and governance, financial oversight, leadership succession, and building a more inclusive board.



## **WORKING WITH NONPROFITS, SPONSORS AND SUB RECIPIENTS**

**DECEMBER 15, 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, and hear firsthand from the staff of groups that provide SHIP services. The presenters will highlight key examples of how SHIP work is effectively outsourced, addressing details of LHAP selection criteria and suggested language for a Request for Proposals. 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.

## **PREPARING FOR YOUR SHIP MONITORING VISIT**

**JANUARY 11, 2017 – 2PM-3:30PM**

**FEBRUARY 15, 2017 – 2PM-3:30PM**

This webinar details the process and items on which SHIP monitors focus their attention during their review of a SHIP jurisdiction. This will help local governments be prepared for and achieve the best outcome from their 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 local governments perform a health and effectiveness "checkup" on the local SHIP program using diagnostic exercises. Key topics include steps in the monitoring process and common monitoring findings.

## **SUCCESSFUL STRATEGIC PLANNING FOR NONPROFIT LEADERS**

**JANUARY 25, 2017 – 2PM-3:30PM**

This is the second of a two-part webinar series for board members and executive directors. The presenters will discuss the components of an effective strategic plan. Participant interaction exercises will help identify why board vision matters, as the trainers discuss the strategic vision statement and strategic goals. The webinar's focus on the planning process will help distinguish between effective and outdated approaches, and will aid participants in considering how consultants can help.



## **HOW TO ADOPT AN AFFORDABLE HOUSING ADVISORY COMMITTEE (AHAC) REPORT**

**FEBRUARY 28, 2017 – 10AM-11:30AM**

It is a statutory requirement to assemble an Affordable Housing Advisory Committee (AHAC) and complete a triennial Housing Incentive Strategies report. Only those receiving \$350,000 or less are exempt. For SHIP jurisdictions that must update their Local Housing Assistance Plans in 2017, the AHAC report is due soon. This webinar provides details about statutory requirements and deadlines, and about legislative changes affecting AHAC membership. Participants will review elements of sample AHAC reports as they learn about the process for developing and submitting the required report. The presenters will provide guidance on specific incentive strategies that the AHAC is statutorily required to consider.

## **BEST PRACTICES FOR IMPLEMENTING A RAPID REHOUSING STRATEGY**

**PART 1: MARCH 14, 2017 – 2PM-3:30PM**

**PART 2: MARCH 28, 2017 – 2PM-3:30PM**

The Florida Legislature has codified that SHIP jurisdictions may provide up to a year of rent subsidies for very low income applicants who are homeless and/or special needs households, in addition to eviction prevention and/or deposits. This set of webinars will allow participants to hear from SHIP jurisdictions that have implemented a rapid rehousing SHIP strategy in coordination with their Continuum of Care agencies and other community partners. Presenters will compare and contrast rent assistance programs for homeless applicants and for applicants with special needs. Key Topics include determining eligibility of applicants, rent limits for the units, steps in the rental assistance process, and the importance of case management. We will summarize best practices, offer tips, and cover how to avoid pitfalls. Presenters will review how SHIP can dovetail with other types of rent subsidies (ESG, HUD CoC, HOME, SSVF, etc.), how to implement the rent subsidy strategy, how to select and work with a sub-recipient organization, and housing counseling services that may be offered in conjunction with SHIP rental assistance. A sample rent assistance strategy will be offered, as well as answers to Frequently Asked Questions.



## **INCOME QUALIFICATION CONSIDERATIONS WHEN WORKING WITH HOMELESS APPLICANTS**

**APRIL 19, 2017 – 2PM-3:30PM**

Unique challenges may be encountered when qualifying a homeless household for SHIP rental assistance. For instance, the household may not have a bank account, may be unemployed or newly employed, or may have lost documentation. This training will examine the challenges of obtaining the standard third party verification from homeless applicants seeking SHIP rental assistance and provide solutions and documentation alternatives that will help your rental program and your applicants be successful.

## **FORMING A SUCCESSFUL HOMELESS-RELATED REGIONAL PARTNERSHIP**

**APRIL 25, 2017 – 2PM-3:30PM**

This is allowed as part of the SHIP Statutory changes: “Local governments may create regional partnerships across jurisdictional boundaries through the pooling of appropriated funds to address homeless housing needs identified in local housing assistance plans.” One possible project is the development of a regional homeless shelter. This webinar will provide guidance on identifying support funds that are available beyond the initial SHIP investment, addressing the logistics of laying several sources of subsidy, and estimating how many will be served and from which counties.

## **INCOME CERTIFICATION FOR SHIP APPLICANTS**

**MAY 9, 2017 – 10AM-11:30AM**

**MAY 18, 2017 – 10AM-11:30AM**

This webinar provides a comprehensive overview of the income qualification process for SHIP applicants. It is designed for those who process applications for SHIP assistance and the people who supervise them. The training will cover the process from application intake through approval, file management and compliance. The presenter will address critical eligibility activities, including income verification, determining household size, and income inclusions and exclusions. Participants will learn how to compute anticipated annual income and complete income and asset verification.

