

Training Schedule 2017-2018

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



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WORKSHOP SCHEDULE

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October 10, 2017 Melbourne	AFFORDABLE HOUSING FUNDING SOURCES
November 7, 2017 Winter Park	THE PREDEVELOPMENT PROCESS
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January 24, 2018 Land O' Lakes	FINANCING AND MONITORING RENTAL HOUSING WITH SHIP
February 7, 2018 Winter Park	PROFICIENCY IN INCOME QUALIFICATION
March 7, 2018 Jacksonville	ENHANCING NONPROFIT CAPACITY FOR PROVIDING AFFORDABLE HOUSING ASSISTANCE
March 20, 2018 North Miami	SHARED EQUITY HOMEOWNERSHIP
April 4, 2018 North Miami	THE NONPROFIT AS AFFORDABLE HOUSING DEVELOPER
April 11, 2018 Jacksonville	RUNNING A SUCCESSFUL REHABILITATION PROGRAM
May 10, 2018 Vero Beach	CLEAN, GREEN AND SOLAR

WORKSHOP DESCRIPTIONS

ASSESSMENT OF FAIR HOUSING

September 6, 2017 – WINTER PARK

Winter Park Community Center, 721 West New England Avenue, Winter Park, FL 32789

The Affirmatively Furthering Fair Housing (AFFH) rule and Assessment of Fair Housing (AFH) tool provide an effective planning approach to help jurisdictions take meaningful steps to promote fair housing choice, overcome historic patterns of segregation, and foster inclusive communities. Participants will learn who is responsible for what under the new rules. The presenters will discuss the AFH process, offer best practices in community engagement, explain how the AFH ties into other planning requirements, and present guidance on the best ways to set goals, measure progress, and assess outcomes.

Who Should Attend?

- Housing program administrators, especially those with upcoming Assessment of Fair Housing deadlines
- Local government staff responsible for completing an Analysis of Impediments
- Local government staff responsible for completing a Consolidated Plan, Annual Action Plan or CAPER
- Public housing authority staff
- Social service providers, continuum of care agencies, legal rights organizations

Key Topics:

- Fair housing history
- Assessments of Fair Housing (AFH) process and best practices
- Mapping and data analysis
- Integrating Consolidated Plans and Assessments of Fair Housing
- Community outreach strategies

LHAP PREPARATION AND STRATEGY DESIGN

September 26, 2017 – TAMPA

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

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. Topics will include preparing the AHAC Report and tuning up your housing strategies in a changing market. The presenters will help participants 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 assess how to enhance housing strategies. Learn best practices to ensure quick approval, and common mistakes to avoid.

Who Should Attend?

- Housing program administrators, especially those with 2016 LHAPs due
- 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

AFFORDABLE HOUSING FUNDING SOURCES

October 10, 2017 – MELBOURNE

Hilton Melbourne Rialto Place, 200 Rialto Place, Melbourne, FL 32901

This workshop provides an overview of funding, including the State Housing Initiative Housing Partnership (SHIP), State Apartment Incentive Loan (SAIL), Community Development Block Grant (CDBG), HOME Investment Partnership Program (HOME), Housing Opportunities for Persons with AIDS (HOPWA), Emergency Solutions Grant (ESG), HUD Continuum of Care (CoC), Low-Income Housing Tax Credit (LIHTC), Hardest Hit Fund (HHF) 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?

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

Key Topics:

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

THE PREDEVELOPMENT PROCESS

November 7, 2017 – WINTER PARK

Winter Park Community Center, 721 West New England Avenue, Winter Park, FL 32789

Predevelopment is one of the most important components of housing development. This training provides guidance to nonprofit organizations on predevelopment and due diligence, necessary for evaluating project feasibility. The workshop 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. Workshop presenters will discuss the Florida Housing Finance Corporation's Predevelopment Loan Program and the requirements, and will walk through the process for obtaining a loan.

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 Housing Market
- Site selection
- Local government requirements
- Site plans
- Engineering
- Members of the development team

THE DEVELOPMENT PROCESS

December 13, 2017 – TAMPA

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

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 infill for home ownership
- Development of rental housing
- Identifying sites
- Local government requirements
- Infrastructure
- Title issues

FINANCING AND MONITORING RENTAL HOUSING WITH SHIP

January 24, 2018 – LAND O' LAKES

Pasco County Utilities Admin. Bldg., 19420 Central Blvd., Land O' Lakes, FL 34637

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

PROFICIENCY IN INCOME QUALIFICATION

February 7, 2018 – WINTER PARK

Winter Park Community Center, 721 West New England Avenue, Winter Park, FL 32789

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

ENHANCING NONPROFIT CAPACITY FOR PROVIDING AFFORDABLE HOUSING ASSISTANCE

March 7, 2018 – JACKSONVILLE

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

This workshop is designed for those interested in building their nonprofit organizational capacity and sustainability, including executive directors, senior staff, board members, and local government staff working with nonprofits. The presenters will explore several facets of nonprofit capacity, including resources, organizational structure, 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
- 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

SHARED EQUITY HOMEOWNERSHIP

March 20, 2018 – NORTH MIAMI

Florida International University Kovens Conference Center

3000 NE 151st Street, North Miami, FL 33181

This workshop will explain shared equity programs, and how incorporating shared equity provisions into SHIP strategies can more effectively expand and preserve the affordable housing stock. We will cover the philosophy, mechanics, and best practices for shared equity programs including how a local government can partner with a community land trust to implement a SHIP shared equity program. Presenters will address key topics such as resale restrictions, local government disposition of surplus lands, lending for shared equity programs, and recordkeeping. Participants will also learn about Fannie Mae and Freddie Mac's Duty to Serve Rule, effective January 2018, which applies to shared equity affordable housing.

Who Should Attend?

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

Key Topics:

- Purpose and philosophy behind shared equity programs
- Three main types of shared equity programs, including advantages, challenges, and examples of each
- Factors in determining resale restrictions and examples
- Walk-through of sample SHIP strategies
- Overview of legal documents such as restrictive covenants and ground leases
- The role of the local government in supporting a CLT, including a review of "surplus lands" law
- Best practices for enforcement and recordkeeping
- How the lending community is supporting shared equity models

THE NONPROFIT AS AFFORDABLE HOUSING DEVELOPER

April 4, 2018 – NORTH MIAMI

Florida International University Kovens Conference Center

3000 NE 151st Street, North Miami, FL 33181

This workshop is designed to present the essential characteristics and assets required for a new nonprofit housing developer to enter and succeed in affordable housing development. Participants will learn what resources are needed to navigate the path from concept to completion and ongoing operation of large and small-scale housing projects. Participants will learn about project selection, members of the development team funding sources, and partnering with an experienced developer to manage the development process and ongoing property management. Participants will understand the importance of leadership and team management in creating a sustainable development business that serves low income and special needs households. This workshop is scheduled in advance of the Pre-Development and Development Process workshops and serves as a good introduction to those trainings.

Who Should Attend?

- Nonprofit Directors, Staff and Board Members
- Local Government Staff interested in building nonprofit capacity

Key Topics:

- Mission requirements
- Staff expertise
- Developer and joint venture agreements
- Financing requirements
- Development management
- Property management

RUNNING A SUCCESSFUL REHABILITATION PROGRAM

April 11, 2018 – JACKSONVILLE

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

The rehabilitation process requires housing administrators and their staff to work with homeowners, contractors, building inspectors, local officials and funders. Understanding each of these groups and learning to work with them helps to avoid some of the problems that are commonly encountered in rehabilitation programs. This workshop will walk through the steps involved in the rehabilitation program process, address weaknesses in rehabilitation programs and best practices to improve your program.

Who Should Attend?

- Rehabilitation Inspectors
- Construction Management Staff
- Rehabilitation staff
- Housing Program Administrators
- Non-profits sponsor and sub recipients involved in Rehabilitation Programs
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Key Topics:

- Program design
- The Home Inspection Process
- Working with homeowners and contractors
- Finding a good inspector
- Reducing change orders
- The importance of work write-ups and specifications
- Written Agreements
- Handling disputes
- Warranties and guarantees

CLEAN, GREEN AND SOLAR

May 10, 2018 – VERO BEACH

Hampton Inn & Suites – Vero Beach Downtown, 611 20th Place, Vero Beach, FL 32960

This workshop will target rehabilitation administrators, nonprofits and contractors, to help them create opportunities for low- and moderate-income communities to access solar energy and other clean and green systems. Participants will learn how to integrate solar and energy technology, and clean, green practices into existing programs. Participants will learn how to access resources such as bulk rate solar, federal incentives, and utility programs. The workshop will feature a demonstration of sample projects from start to finish, including homeowner rehabilitation, new home construction, and accessibility modifications. Financing sources for solar and energy specific activities will also be covered.

Who Should Attend?

- Housing developers
- Local government staff
- Neighborhood associations
- Nonprofits

Key Topics:

- Renewable energy and housing
- Sample renewable energy projects
- Solar financing sources
- Renewable incentives

WEBINAR SCHEDULE

DATE	TRAINING
JULY 27, 2017 - 2PM	Preparing and Submitting the Annual Report
JULY 31, 2017 - 2PM	Preparing for SHIP Monitoring Visit
AUGUST 16, 2017 - 2PM	Community Housing Development Organization (CHDO) Part 1: HOME Rules and Regulations
AUGUST 31 - 2PM	Rehabilitation Series, Part 1: Roles and Responsibilities
SEPTEMBER 18, 2017 - 2PM	Income Certification for SHIP Applicants
SEPTEMBER 21, 2017 - 2PM	Alternative Approaches to Affordable Housing Development
OCTOBER 5, 2017 - 2PM	Rehabilitation Series, Part 2: Contractor Selection and Evaluation
OCTOBER 16, 2017 - 2PM	Pre- and Post-Disaster Recovery with SHIP
OCTOBER 25, 2017 - 2PM	Community Housing Development Organization (CHDO) Part 2: Predevelopment, Board Composition
NOVEMBER 8, 2017 - 2PM	Rehabilitation Series, Part 3: Initiating Rehabilitation Assistance
NOVEMBER 9, 2017 - 2PM	Best Practices for Implementing a Rapid Rehousing Strategy
NOVEMBER 13, 2017 - 2PM	Special Needs Assistance with SHIP Funds
DECEMBER 4, 2017 - 2PM	New LHAP Strategy Design and Amendments
JANUARY 11, 2018 - 2PM	Rehabilitation Series, Part 4: Addressing Complaints in the Rehabilitation Process
JANUARY 16, 2018 - 10AM	Property Manager Series, Part 1: Tenant Selection, Screening In vs Screening Out, Selection Criteria, Access for Special Needs Applicants
FEBRUARY 6, 2018 - 10AM	Financial Management for Non Profits
FEBRUARY 12, 2018 - 2PM	Housing Counseling Series, Part 1: Offering SHIP Housing Education and Counseling

DATE	TRAINING
MARCH 5, 2018 - 2PM	Housing Counseling Series, Part 2: Successfully Implementing Counseling Assistance
MARCH 19, 2018 - 2PM	Best Practices for Serving on a Housing Nonprofit Board
MARCH 26, 2018 - 2PM	Property Manager Series, Part 2: Marketing, Policies, Fair Housing and More
MARCH 29, 2018 - 2PM	Working with Blended Financing/Subsidy Layering
APRIL 23, 2018 - 2PM	Development Plan Review
APRIL 30, 2018 - 2PM	Joint Ventures Series, Part 1: Options for Partnership
MAY 15, 2018 - 2PM	Emergency Solutions Grants (ESG) and SHIP
MAY 17, 2018 - 2PM	Joint Ventures Series, Part 2: Showcase of Successful Partnerships
JUNE 12, 2018 - 2PM	Submitting a Successful Application for Florida Housing's RFA

WEBINAR DESCRIPTIONS

PREPARING AND SUBMITTING THE ANNUAL REPORT

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.

PREPARING FOR SHIP MONITORING VISIT

This workshop details the process and items that SHIP monitors focus their attention on during their review of a SHIP jurisdiction. This will help local governments be prepared for and achieve the best outcome from 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.

COMMUNITY HOUSING DEVELOPMENT ORGANIZATION (CHDO) PART #1: HOME RULES AND REGULATIONS

This is the first part of a two-webinar series about obtaining the CHDO Designation. It addresses the benefits of becoming this type of nonprofit organization, as well as the requirements for maintaining that status. This introductory webinar will help CHDO staff navigate their way to success in a changing environment that is placing increasing pressure to perform in the HOME program. It is designed for nonprofits interested in the CDHO designation, local government staff interested in working with CHDOs, and staff at current CHDOs.

REHABILITATION SERIES, PART 1: ROLES AND RESPONSIBILITIES

This training addresses the roles and responsibilities of the key participants in the rehabilitation process, including the contractor, homeowner, SHIP administrator, and third-party sub recipient. The webinar presents information about “who is responsible for what” to achieve success.

INCOME CERTIFICATION FOR SHIP APPLICANTS

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.

ALTERNATIVE APPROACHES TO AFFORDABLE HOUSING DEVELOPMENT

This training explores Shared Equity Models, Linkage Fees, Inclusionary Zoning Ordinances, and other localized approaches to producing and preserving affordable housing. For example, a community land trust (CLT) is a form of shared equity that maintains ownership of underlying land through a ground lease which also sets resale pricing to protect the affordability of the housing as time goes on. The Town of Jupiter will serve as a case study for methods of providing workforce housing. Participants will learn about the challenges and highlights experienced throughout the process for the first municipality in the state of Florida to adopt a workforce housing ordinance with both a linkage fee and inclusionary zoning requirements.

REHABILITATION SERIES, PART 2: CONTRACTOR SELECTION AND EVALUATION

In this training, participants will learn how to work with contractors and homeowners to avoid some of the problems that are commonly encountered in rehabilitation programs. Participants will learn methods for removing non-performing contractors, and retaining those who produce timely results.

PRE- AND POST-DISASTER RECOVERY WITH SHIP

Florida must be prepared for hurricanes, fires, floods, tornados and more. Every hurricane season has the potential to be a destructive one—this is incentive enough to plan ahead. This webinar will be presented in coordination with staff from the Florida Division of Emergency Management (DEM), who will detail new construction and rehabilitation features that strengthen a home against damage from futures disasters. Participants will learn to identify community partners who are preparing for disasters and organizing to respond when the time comes. Presenters will address the valuable contribution of the SHIP program in responding to past disasters. Learn how to ‘tune up’ your SHIP disaster response strategy. Key topics will include the Local Mitigation Strategy and Voluntary Organizations Active in Disasters.

COMMUNITY HOUSING DEVELOPMENT ORGANIZATION (CHDO) PART #2: PRE-DEVELOPMENT, BOARD COMPOSITION

This is the final part of a two-webinar series about obtaining the CHDO Designation that addresses the benefits of becoming this type of nonprofit organization. Webinar #2 will address details of CHDO activities during predevelopment and underwriting. The presenters will discuss pitfalls to avoid with subsidy layering. Participants will learn what developing strategies to employ in order to build or demonstrate that their agencies have the capacity needed to maintain CHDO status and receive HOME CHDO set-aside funds. The training will also provide ideas for complying with requirements for CHDO board composition and will also address how to start a HOME Consortium.

REHABILITATION SERIES, PART 3: INITIATING REHABILITATION ASSISTANCE

Before your organization begins the rehabilitation process you must have policies and procedures that identify the steps involved in the rehabilitation process. During this webinar, we will discuss the procurement process, the bidding process, the pre-bid meeting, contract award, signing agreements and supervision of the project during the bid process. Come hear about best practices that you can implement in your current rehabilitation program.

BEST PRACTICES FOR IMPLEMENTING A RAPID REHOUSING STRATEGY

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. Participants will hear from SHIP jurisdictions that have implemented a rapid rehousing SHIP strategy in coordination with their Continuum of Care agencies and other community partners. Key Topics include determining eligibility of applicants, rent limits for the units, steps in the rental assistance process, and the importance of case management. 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.

SPECIAL NEEDS ASSISTANCE WITH SHIP FUNDS

This webinar 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. Learn how local Centers for Independent Living, Arc agencies and other service providers can help identify special needs applicants in need of housing assistance. The presenters will review collaborations with CoC homeless Coordinated Entry, Foster Care, and domestic violence programs. The training will help fine tune plan to comply with the special needs requirement in a timely fashion.

NEW LHAP STRATEGY DESIGN AND AMENDMENTS

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.

REHABILITATION SERIES, PART 4: ADDRESSING COMPLAINTS IN THE REHABILITATION PROCESS

This training covers options for addressing homeowner or contractor complaints. The presenters will address the role of arbitration and discuss what input may be provided by the affordable housing advisory committee (AHAC).

PROPERTY MANAGER SERIES, PART 1: TENANT SELECTION, SCREENING IN VS SCREENING OUT, SELECTION CRITERIA, ACCESS FOR SPECIAL NEEDS APPLICANTS

This is the first part of a two-webinar series for multifamily property managers. Presenters will offer guidance to ensure that marketing, tenant screening, and property management policies and procedures comply with fair housing requirements. Participants will consider plans and actions that take meaningful steps to promoting fair housing choice and fostering inclusive communities.

Topics to include:

- Marketing and tenant selection practices related to fair housing, as well as Florida Housing requirements and Tenant Selection Plans.
- Reasonable accommodations and modifications related to tenant selection and physical and other types of accessibility for persons with disabilities.
- Practical guidance related to policies, processes, and information gathering related to disabilities.

FINANCIAL MANAGEMENT FOR NON PROFITS

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.

HOUSING COUNSELING SERIES, PART 1: OFFERING SHIP HOUSING EDUCATION AND COUNSELING

SHIP administrators may benefit from establishing many local partnerships. This includes engaging the expertise of local nonprofits and other who offer counseling and education on several housing topics. The first part of this two-webinar series teaches SHIP administrators how to partner with HUD approved counseling agencies to provide education and one-on-one assistance to the SHIP eligible households who want SHIP purchase assistance. Equipping buyers with this knowledge helps increase the possibility that buyers will have success with homeownership. The trainings will provide an overview of available housing counseling resources, including an introduction to SHIP housing counseling funds. The following activities will be discussed: helping households find a home to buy, locating an affordable rental, and maintaining homes.

HOUSING COUNSELING SERIES, PART 2: SUCCESSFULLY IMPLEMENTING COUNSELING ASSISTANCE

The final part of this series will address how HUD approved counseling agencies may provide your SHIP eligible applicants with post-purchase education, foreclosure prevention classes, and one-on-one counseling. The presenters will discuss the process of selecting and contracting with a counseling agency. The training will also address the HUD Counseling Notice of Funding Availability (NOFA) and HUD's new examination for certifying individual counselors.

BEST PRACTICES FOR SERVING ON A HOUSING NONPROFIT BOARD

This is the first a two part webinar series beneficial for board members who are less likely to travel to workshops. Nonprofit board member determine their organizations' mission, and to guide them in achieving it 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: Oversight and Governance, Financial Oversight, Organization Leadership Succession, and Building a More Inclusive Board.

PROPERTY MANAGER SERIES, PART 2: MARKETING, POLICIES, FAIR HOUSING AND MORE

This is the last part of a two-webinar series for multifamily property managers. It builds on the first by providing training on special topics, including:

- Conducting tenant selection on a case by case basis for homeless and special needs households.
- Screening in versus screening out households with special needs, disabilities, and histories of homelessness.
- Selection criteria, parameters, and thresholds related to access for special needs applicants (e.g., criminal records, credit and employment histories, eviction and homelessness histories), while taking into consideration property and other residents' needs.
- Working with support services agencies to facilitate access.

WORKING WITH BLENDED FINANCING/SUBSIDY LAYERING

Monitoring projects that have several different funding sources can be difficult. Determining which rule takes precedence over another is important to understand when monitoring blended projects. This webinar offers guidance on monitoring projects that have multiple funding sources such as SHIP, HOME and tax credit financing. It will address which project rules apply when there are multiple funding sources and considerations when reviewing rents, utility allowances, annual Resident Income Certifications, recording keeping and file reviews.

DEVELOPMENT PLAN REVIEW

The webinar will present development underwriting from the perspective of local SHIP administrators. While SHIP funds may make up only a small portion of a development's overall sources, it is imperative that staff understand how to accurately assess its ability to succeed financially and fulfill SHIP requirements, including expenditure deadlines and ongoing compliance. This training will provide a general framework for reviewing development plans, which SHIP staff may apply with their own local programs, policies and procedures.

JOINT VENTURES SERIES, PART 1: OPTIONS FOR PARTNERSHIP

Sometimes it is a necessity for a nonprofit developer to find a for-profit development partner. Some need a partner because of the experience required for Florida Housing applications. And realistically, some just are not ready to go it alone. This first part of a two-webinar series explores options for partnership. A development partner may be either a nonprofit or for profit entity that has experience with the proposed type of development. Assess if your organization needs a development partner, and learn how to evaluate a potential development partner and how to structure a Developer Agreement. Presenters will offer ideas for locating a partner and methods for checking references.

EMERGENCY SOLUTIONS GRANTS (ESG) AND SHIP

This training will make the connection between assisting homeless households with these two funding sources. The presenters will offer methods for coordinating services, providing housing stability counseling, and establishing priorities of assistance.

JOINT VENTURES SERIES, PART 2: SHOWCASE OF SUCCESSFUL PARTNERSHIPS

The last part of this two-webinar series will focus on what a nonprofit developer can expect from a partnership. It will feature partnerships that illustrate key topics about how to assign the work, and ways to divide the fee. Presenters will discuss risks involved with partnerships.

SUBMITTING A SUCCESSFUL APPLICATION FOR FLORIDA HOUSING'S RFA

In recent years, Florida Housing Finance Corporation has issued requests for applications (RFAs) to provide tax credits for developments with a homeless or special needs focus. However, these RFAs have been undersubscribed. This webinar, designed with input from Florida Housing's multi-family program staff, will focus on these and other RFAs that receive relatively few applications and may be opportunities for funding success. Learn what is involved with submitting an application and the planning that goes into a development that receives funding through these RFAs.