

## Our Mission

To provide opportunities for safe, decent, affordable housing and improve housing conditions of low and moderate income people primarily in rural areas. To that end we seek to:

- Provide training, technical assistance, and support to organizations to enhance their capacity.
- Encourage, support, and educate people to obtain and preserve decent, affordable housing.
- Provide financing for affordable housing and community development efforts with a goal of fostering borrower capacity and community impact.
- Increase public awareness about effective community housing efforts and the need to improve housing conditions.
- Formulate and advocate improved public policy.

NCALL is governed by a Board of Directors made up of fifteen members. We are a chartered NeighborWorks America organization and a United Way affiliate agency.



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What Can We  
Expect as an  
Operating  
Grantee?



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*NCALL provides many services to prospective, predevelopment and operating grantees. The purpose of this brochure is to ensure that the organizations that we work with are familiar with our services and training plan. Please review the following information so that you may request specific training when necessary.*



## Operating Grantees

NCALL will conduct a site visit within 90 days of a grant closing for new and operating grantees to conduct a financial assessment. This assessment will cover the financial controls and/or accounting system procedures that cover both Section 523 grant funds and Section 502 loan funds, as well as funds from other sources. NCALL will also provide the appropriate financial staff training during this same trip. NCALL will work to ensure that the grantees understand and establish sound financial practices.

A training schedule will be established after grant closing that will provide training for all staff positions and the Board of Directors. Staff positions include Project Director, Group Coordinator, Construction Supervisor, and Bookkeeper. Guides for the above positions have been developed and will be used for this training.

NCALL will conduct an on-site visit to provide SHARES training. On-site training will also be provided to existing grantees when there has been a staffing change that impacts the operation and input of data into SHARES. NCALL will respond throughout the month to any questions or issues with the operation of SHARES. NCALL will notify grantees of any new enhancements to the system.

NCALL will attend the Quarterly Review Meetings. Preparation for the meeting will include, when appropriate, establishing date and time of the meeting, notification of all parties, development of a meeting agenda, assistance to the grantee for presentation of information relating to the operation of the grant, and review of all SHARES reports.

NCALL will conduct additional site visits, which will include but are not limited to:

- **Staff Training for Existing Grantees.** If requested, NCALL will provide on-site staff training to an existing grantee that has experienced staff turnover.

- **Other Training.** In addition to staff training, NCALL has a variety of training modules that include SHARES, leveraging 523/502 funds, management and personnel supervision, and hiring and firing policies and procedures.
- **On Site Assistance.** Other site visits could include assisting with a feasibility study for a new county, helping with the recruitment process and processing loan applications, assisting with family meetings, and facilitating a mediation meeting between families within a construction group.
- **Promotional Assistance.** NCALL will conduct site visits during Homeownership Month or at any other time, to participate in grantee celebrations, which help to promote Self-Help Housing. NCALL will provide any assistance that is needed by the grantee in carrying out these celebrations. This assistance may include event planning, advertising, event organizing, and development of invitations and media kits.
- **Annual FAVORs.** To assist with problem identification and take a proactive role of early detection, NCALL will conduct an annual FAVOR of all operating grantees within each year of the two-year grant. If an organization has more than one grant operating, all grants will be assessed during the site visit. During a FAVOR, NCALL will use a variety of tools to analyze the self-help program. The FAVOR will include a review of Program Management, Administration, Construction Management, Financial Management, Board of Directors Operations, 502 Loan Processing and the overall Program Operations. Conclusions, recommendations, and suggestions will be made to the grantee's Executive Director and Board Chair, with copies to the appropriate Rural Development offices. NCALL will conduct follow-up reviews during Quarterly Review Meeting trips.

NCALL staff will maintain contact with organizations each month. NCALL will also conduct a complete analysis of all SHARES Reports monthly for each operating grantee within the region. NCALL has developed a management tool to analyze if the grantee is achieving the desired benchmarks for the Self-Help program. These benchmarks will assist in

viewing the relationship between time, spending and production. The analysis will be forwarded to each grantee monthly.

## High Risk Grantees

Shortly after being notified of a high-risk designation, NCALL will conduct an on-site assessment. NCALL will identify the problem and develop a plan of corrective action. The plan will detail specific actions to be taken including milestones with follow-up dates at appropriate intervals. NCALL will prepare a report to the State Director including all conclusions, recommendations for corrective action, and the development of an action plan.

Quarterly Review Meeting's for new and High Risk grantees will also include mini assessments. NCALL will conduct an evaluation of various areas of the program, including but not limited to financial management, construction management, program goals and objectives, administrative procedures, and on-site evaluation of homes under construction.

## All Interested Organizations

NCALL will publish and distribute the "Self-Helper" newsletter quarterly. NCALL utilizes this newsletter as a networking tool, a training tool, and an information dissemination tool. This newsletter will be sent to operating, new and prospective grantees, Rural Development and other interested parties.



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