**Covid-19 Response Counseling Member Virtual Meeting Notes**

**March 25, 2020**

Our call revolved around pressing challenges and needs for Housing Counseling agencies, which included:

* Technology needs for staff and clients
* Strategies to build trust and accessibility to virtual tools
* HUD requirements of virtual coaching
* Places to find additional and evolving resources

**Conversation Notes**

Transitioning to Virtual Coaching

* There were several request on the call to get clarity from HUD on items related to virtual counseling and education, for example signatures on action plans and the required length for education classes done virtually.
	+ We posed these questions to our HUD POC, but as you can imagine HUD is getting numerous questions that need to be vetted within the Department. They are working on a new set of FAQ in response. Unfortunately, this means that they are not answering individual question at this time. We will remain engaged with HUD to get responses, and will pass them along as soon as we have them.
* Cori from WayFinders talked about their virtual work. They upload documents through client portal; have a tool to schedule appointments. Doing online workshops, in general they do 95% of follow virtually already.
* Shifting to move financial capability classes online. Some of the ways they are changing things to comply with HUD requirement is to get materials in advance. Upload copy of driver’s license, record session, do roll call, which will provide a way to do sign in sheet virtually. Save demographic information in the folder.
* Homeport it working to move virtually. Have not done as much virtually previously. Putting technology in place to serve clients and get documents electronically.
* As you move to virtual sessions, language matters. Found that clients weren’t comfortable with “video session” didn’t want to be on camera, but liked the ability to share screen. So used language like “online” appointment.
* In terms of protecting personal information, Champlain Housing Trust mentioned that the credit reporting service they use, CID (?) that allows the borrower to access their credit report through their website. It takes CHT out of the process—don’t have to receive the credit report, client has it directly.
* As part of the discussion, several colleagues referenced technology or applications that they are utilizing to adapt to counseling over the internet or by phone.

***NOTE:*** *HPN and its members are not endorsing any product. It is also important to recognize that, particularly as it relates to securely gathering or transmitting materials, many applications need to be configured in a specific way and processes must be implemented to ensure security. Therefore, as you evaluate technology options, you must review your agency’s technology, privacy, and other policies to determine if these resources are compatible with your agency’s own standards, processes and requirements. We recommend consulting to your IT staff for the best guidance on these matters.*

* Cori from Wayfinders mentioned that they have looked at [Hightail](https://www.hightail.com/), which HPN has also utilizes. Someone asked about [Box](https://www.box.com/home), which Minnesota Homeownership Center indicated they have used successfully. Laurie from INHP also indicated that they utilize [FormAssembly](https://www.formassembly.com/), which uploads directly into their salesforce-based system. Laurie also mentioned that they utilized [Accession Mobile](https://gtb.net/solutions/hosted-pbx/flexpoint%E2%84%A2-features/accession-mobile) so that when their counselors work from home their private phone number is concealed and instead it links to their office number.
* In order to help clients scan documents that they may need to send back to counselors, people referenced the following applications that their clients have been able to use: [Adobe Scan](https://acrobat.adobe.com/us/en/mobile/scanner-app.html), [Abbyy FineScanner](https://www.abbyy.com/en-us/news/abbyys-finescanner-now-with-bookscan/#sthash.xXqakFOg.dpbs) (multilingual and only paid if more storage is needed), and [Genius Scan](https://thegrizzlylabs.com/genius-scan).
* NHS of Chicago also noted that their clients have found the [Zoom App](https://zoom.us/) easy to use as a way to have virtual counseling sessions with clients.
* Also recommended that organizations that use Zoom—password for the meetings, unique meeting IDs.

Outreach Efforts

* In terms of proactive outreach to borrowers, Avesta noted that when clients sign up for homebuyer classes use constant contact, so way to reach out to homeowners after purchase. They also referenced that they were doing short videos via Facebook to reach people and give information about how to manage during this time, for Avesta—tips for developing an emergency budget.
* Homeport has hosted “Ask Laden” sessions with one of their counselors.
* Zoraima from CDCB mentioned that they have created videos on how to utilize technology on facebook.