A FULL WEEK OF PROFESSIONAL LEARNING

COMPLETE WITH:

- More than 75 cutting-edge courses, many new or updated
- A myriad of networking, peer learning and personal development sessions

A SPECIAL WEDNESDAY SYMPOSIUM
SY903 Co-creating an Equitable Future at the Intersection of Health, Housing and Community Development
WE INVITE YOU TO JOIN US FOR OUR FIRST TRAINING INSTITUTE OF 2024, set against the iconic backdrop of San Francisco! The City by the Bay has often been at the forefront of social change, and so it’s a perfect setting for building skills, gaining new knowledge and strategies, and learning from experts and peers alike.

The city is a microcosm of our country – a large, diverse and sophisticated urban area with inner-ring suburbs and agricultural, rural economies within 75 miles of the downtown core. San Francisco’s successes, as well as the challenges it currently faces, can provide inspiration and fresh insights into how we can all address our own community needs and opportunities.

And the training institute will definitely provide new and innovative approaches in the more than 70 courses we’ll offer. We are especially pleased to offer:

- New foundation courses in community engagement (CB105/106/107)
- The Power of Communication: Talking, Listening and Messaging (CB108)
- Advancing Homeownership for People of Color (HO219)
- Métodos de Educación para Compradores de Casa: Entrenando a los Instructores (HO229sp)
- Financial Coaching: Helping Clients Reach their Goals (HO310)
- Fundamentals of Sustainable Funding: Engaging Individual Donors (ML172)
- Leading and Engaging an Equitable Organization (ML242)
- Comprehensive Community Development in Places (NR105sv)
- Rethinking Reentry: The Role of Community (NR240)

On Wednesday, we’ll celebrate a decade of work at the intersection of housing, community development and health. Join us for Co-creating an Equitable Future at the Intersection of Health, Housing and Community Development, which will provide an opportunity to consider the future of health equity efforts in affordable housing and community development, with a particular focus on resident-led solutions, community-based investments, and cross-sector strategies. The symposium will engage community leaders, experts in the community development and health fields and partners from across sectors in identifying new, actionable opportunities to create thriving communities. To build out a week of learning on community health, we are excited to launch two new courses:

- Getting Started in Health Equity Work (NR160) – Monday-Tuesday
- Community Projects in Health Equity Work (NR260) – Thursday-Friday

But expert-led courses aren’t the only component of a great week of learning and growth. We also offer abundant opportunities for participants to connect with each other, sharing best practices and lessons learned, building professional networks and supporting our mutual work in the critically important area of community development. Check out all the opportunities and be sure to join in the fun!

We look forward to seeing you in February for a week that will change the way you approach your work, and provide the excitement and energy to empower that change. Invest in your organization’s impact – and your career – by registering today.

P.S. Did you know that the average high temperature in San Francisco in February is 60º?
# TABLE OF CONTENTS

San Francisco—In-Person! ...................................................... 4
Courses Offered at this Event ................................................ 5
Affordable Housing ............................................................. 6
Asset Management .............................................................. 7
Community Economic Development ..................................... 8
Community Engagement ...................................................... 9
Community and Neighborhood Revitalization ...................... 10
Construction and Rehab ...................................................... 12
Financial Capability, Homeownership Education and Counseling ................................................................. 12
Nonprofit Management and Leadership ............................... 17
Single-Family and Small Business Lending ............................ 19
SYMPOSIUM: Co-creating an Equitable Future at the Intersection of Health, Housing, and Community Development ......................................... 20
Networking and Personal Growth .......................................... 21
Registration Information and Event Policies .......................... 22
Upcoming Events You Cannot Miss ...................................... 23

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THANKS TO OUR SUPPORTERS

JPMorgan Chase & Co.  
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We encourage you to be COVID-safe!
We do not require vaccination or masking, but we do encourage it – especially when in larger groups! We also recommend testing for COVID three days or less before you arrive in San Francisco. And if something happens while you’re with us onsite? We’ve got you covered. We have medical support staff to assist, and we’ll guide you through isolating. We’ll also confidentially assist with contact tracing so fellow participants are protected. Download our COVID-related policies and guidance.

We’re keeping you energized!
We will keep the beverages flowing – two beverage breaks in the morning and one in the afternoon. In addition, late morning and afternoon breaks will include to-go snacks! All actual meals are on your own – with plenty of options in our venues and nearby to choose from.

We’re helping you connect with your colleagues
We’ve got new and fun ways to connect with your peers from around the country. New ways to foster discussion that can enhance your work and your career! Check out the activities listed on page 21-22. You can register for these activities when you register for courses – and for most of these activities you can also look for availability onsite. Note that the area tours and karaoke evening have limited capacity and require advance registration. We look forward to relaxing with you outside of class hours!

We’re getting you home on time!
Travel from the west coast can be a challenge. We’re adjusting our schedule and ending Friday courses at 1 p.m. to help you travel back. Questions or concerns? Email us at nti@nw.org or call us at 800-438-5547.

And we have more coming...
Join us at the opening plenary to hear about the new things we’re planning in the coming months to make your professional learning experience even better.

See you in the City by the Bay!
**AFFORDABLE HOUSING**

**AH101 The Fundamentals of Affordable Housing Development**
This course leads participants through the basics steps of developing an affordable housing project from site selection and project feasibility, through development team selection, to budget design and funding. Participants will also learn to assess the pros and cons of real estate development and how they can affect an organization’s goals. The course will provide a secure grounding for new project managers as well as providing executive directors and board members a base of knowledge that will allow them to adequately follow the development process. This class satisfies the housing development course requirement for the Certified Housing Asset Manager designation.

Find out more about CHAM’s Asset Management Pro

**AH111 Using the CDBG Program**
The Community Development Block Grant is still the basic ingredient of many federal programs. Get a clear understanding of CDBG — what you can do with it and what you can’t, and how it affects nonprofits in their activity delivery costs, loans and grants, and as recipients of HOME and HOPE funds.

**AH113 Using the HOME Program**
The HOME program is the major source of housing development funding for many nonprofit community-based organizations. Get a clear understanding of how the program works, how it can be used to attract nonfederal sources of project support, and what the restrictions are related to use by sub-recipients. The course covers the HOME program in detail, clearing up many of the misunderstandings about how the program can be used. Recommended for community housing development organizations and other community-based organizations involved in affordable housing development.

**AH115 Using the Low-Income Housing Tax Credit (LIHTC) Program**
This introduction to low-income housing tax credits covers various IRS regulations, including 70%/30% present value credit, method of discounting, eligible basis, qualified basis, and adjusted basis. Learn about syndication, ownership structure, and negotiating equity proposals. For managers, loan officers and rehab specialists familiar with multifamily financing but not experienced with syndications and/or tax credits.

**AH121 Real Estate Finance Nuts and Bolts**
This entry-level course introduces the key components of real estate financing. You’ll learn basic terms and principles of financing real estate. Examine the concept of loan amortization and the American mortgage lending system for rental and home ownership. Learn to use spreadsheets to make basic financial calculations of loan payments, interest rates, present and future values of investments/loans and the APR. Appropriate for people new to real estate financing and those wanting to learn how to use spreadsheets. This course is the recommended prerequisite to Rental Housing Development Finance (AH221) and other development finance courses. A basic knowledge of Excel is necessary for this class. Please be prepared to bring a laptop computer to this class. If you cannot, there may be some available for your use.

**AH134 The Developer’s Tool Kit**
One of the most widely sought-after and highly recommended housing courses in Colorado is now offered to a wider audience! Join us for an exciting two-day course designed to enlighten participants about the art and science of affordable housing development. Through role playing, participants will learn about the process of developing high-quality housing, cost-containment techniques, contractor selection and real estate terminology. This is a paperless course. Participants will be asked to bring their own laptops. If this is not possible, some laptops may be available to borrow.

**AH136 Successful Housing Development: Assembling the Best Project Team**
Architects, general contractors, development consultants, project managers, property managers, engineers, realtors, appraisers, accountants, attorneys...Who do you need on your development team? Who don’t you need? How does a team change for different kinds of projects? In this practical course, nonprofit housing staff and board members will develop the skills to define and assemble a strong, effective development team for a successful project. You’ll learn when to engage your board in real estate ventures, how to prepare successful Requests for Qualifications or Proposals for third-party team members and multiple ways to identify contractors and other professionals. You’ll know the pros and cons of having in-house development staff versus working with consultants. And once your team is in place, you’ll have tools and techniques to manage everyone and keep your project on track throughout its development.
AH211 How to Maintain Compliance in LIHTC Projects
This one-day course goes beyond the day-to-day compliance needs of property management and covers the variety of responsibilities the general partner has for maintaining compliance through the life of the property. These responsibilities include fulfilling program obligations to the IRS and the State Tax Credit Allocation agency, managing resident selection, income certification and rent limits and understanding the partnership agreement and the financial and reporting needs of the limited partner. Starting with an overview of how the Low-Income Housing Tax Credit (LIHTC) program works, this class provides participants an opportunity to delve into what happens after the credits are awarded. This class satisfies the LIHTC course requirement for the Certified Housing Asset Manager designation. Find out more about CHAM’s Asset Management Professional Certificate Programs or visit CHAM’s website.

AH221 Rental Housing Development Finance
Join us to learn project financial planning through hands-on training in the basic skills required to determine the feasibility of financing multifamily housing. Using case studies, we’ll walk through analyses of project costs, income and expenses and debt and equity capital to determine if a project is financially feasible. You’ll learn to perform static and dynamic real estate finance analyses. Appropriate for technical staff or managers contemplating multifamily development. Financing experience is not necessary. Participants should have a working knowledge of Excel. Real Estate Finance Nuts and Bolts (AH121) is strongly recommended as a prerequisite for this class. Please be prepared to bring a laptop computer to this class. If you cannot, one may be available for your use.

AH226 Creative Project Financing Strategies
Development projects require different types of funding from numerous sources. Participants will learn about these resources and how to combine private loans, public capital funds and ongoing subsidies for strong, sustainable projects. Case studies citing successful examples of residential and mixed-use real estate development will be analyzed so participants will understand the financing obstacles that were overcome and the nuts and bolts of how these deals were structured.

AH240 Creating Partnerships to Advance Affordable Housing
Do you need a partner for your development project? Would your project benefit from a for-profit co-developer or a CDC teammate? To create special needs housing, do you need to marry a social service provider who can support your residents long-term? Has a public agency offered you a site, provided you work with them to develop it? If the answer is “YES” to any of these questions, this new course will help you determine what your response should be to these potential opportunities. In this course, you will assess the kinds of development opportunities that may benefit from forming a partnership with a for-profit developer, service provider or local government. You will get the information you need to evaluate whether another organization is likely to be a good match, review the diverse ways to structure partnerships, and learn how to be strategic in negotiating with a potential partner. You will also discover how to determine how a partnership might impact your own organization—for the better but possibly for the worse—and the potential downsides to partnering. Like any relationship, a development partnership can be fantastic... a disaster... or something in between. This course will give you the skills and knowledge to avoid disaster and head toward fantastic. This intermediate-level course is designed for executive directors, development project managers, senior asset managers and others who already have an overall understanding of the real estate development process.

ASSET MANAGEMENT

AM121 Nuts and Bolts of Asset Management (CHAM)
Nuts and Bolts of Asset Management is an interactive and engaging course designed for housing practitioners and board members. It includes an overview of key property asset management concepts, theories and responsibilities, including the “double bottom line” concept of affordable housing ownership—the theory of steering properties toward both business and mission-based goals and outcomes. Additional topics include important asset management concepts, theories and responsibilities through the life stages of a property—planning, construction, lease up, operations and disposition—with a focus on the critical interrelationship between these stages. We’ll also cover basic number-crunching of key performance indicators (including revenue, occupancy, expense and financial ratios as well as trend projection analysis), and their relationship to financial and operational health and long-term viability. Finally, we’ll review and analyze property financial reports and property/partnership audits, as well as best practices for tracking, measuring and assessing progress toward key operational and financial performance. This class is a great orientation to the subject and is perfect for new employees, board members, people with new asset management duties, property managers, board members, and executives who supervise asset management. Find out more about CHAM’s Asset Management Professional Certificate Programs or visit CHAM’s website.
**COURSE DESCRIPTIONS**

**AM290 Asset Management Fundamentals (CHAM)**
This three-day course is designed to further acquaint the affordable housing practitioner with the concepts and strategies of sound asset management. It is a major building block in the CHAM® curriculum. It combines interactive lectures, in-class exercises, case studies and outside-class homework assignments. This class includes a test, successful completion of which is required for those pursuing the Asset Management Specialist (AMS) and CHAM designations. AM290 Asset Management Fundamentals and AM291 Financial Fundamentals for Asset Managers are recommended, but not required, to be taken sequentially during the same week. AM21 The Nuts and Bolts of Asset Management, a three day class on asset management fundamentals that is offered regularly at the NeighborWorks Training Institute (NTI) is a prerequisite. Find out more about CHAM’s Asset Management Professional Certificate Programs or visit CHAM’s website.

**AM291 Financial Fundamentals for Asset Managers (CHAM)**
This two-day class is an introduction to real estate finance, exploring analytical concepts that are critical for the professional asset manager. The class will cover basic tools for analyzing properties’ financial health, for determining their market value, and for developing multi-year financial projections. This class includes a test, successful completion of which is required for the Asset Management Special (AMS) and CHAM® designations. The Nuts and Bolts of Asset Management, a three-day workshop on asset management fundamentals that is offered regularly at the NeighborWorks® Training Institute (NTI), is a prerequisite for AM291. AM291, in turn, is a prerequisite for Advanced Financial Tools, which is also a requirement for the CHAM® designation. Find out more about CHAM’s Asset Management Professional Certificate Programs or visit CHAM’s website.

**AM321 Advanced Financial Tools for Asset Managers (CHAM)**
Advanced Financial Tools for Asset Managers is an advanced course in the CHAM track, open to participants who have passed the test for Financial Fundamentals for Asset Managers (AM291). Advanced Financial Tools will cover a range of topics and analytic techniques that are important for asset managers of affordable multifamily housing, including financial analysis of investment return (NPV and IRR analyses), right-sizing debt for multifamily properties, and Low-Income Housing Tax Credit topics including investor return analysis, recapture, capital accounts, and Year 15 options. Participants will need to bring a laptop, and need to be comfortable creating and working with Excel spreadsheets. Find out more about CHAM’s Asset Management Professional Certificate Programs or visit CHAM’s website.

**AM351 Advanced Housing Asset Management (CHAM)**
Advanced Housing Asset Management (AHAM) is the final course in the Certified Housing Asset Manager (CHAM) series. It is designed for participants who have completed or tested out of all the other courses in the series (see the CHAM designation curriculum for details). This class will bring together all the aspects of asset management covered through the CHAM curriculum and will take place over a period of approximately 30 days in a combination of traditional classroom and online learning settings. At its conclusion, students will be prepared to submit their CHAM project for review, the final stage in securing the CHAM designation. Part I of this course will be three consecutive days held in a classroom. Students will explore techniques for analyzing and managing portfolios of properties through exercises involving both case studies and analysis of their organizations’ portfolios. Please bring a laptop and prepare materials in advance; more information will be sent a few weeks prior to the start of Part I. In Part II of this course, students will prepare an asset management plan for one of their properties, analyzed and presented in the context of their property portfolio. This part of the course will use remote learning strategies where participants will schedule one-on-one coaching from the instructors on their property asset management plan and present a summary of their plan via videoconferencing to a group of fellow participants for peer feedback and insights. Part II will conclude within 30 days of the commencement of Part I. Find out more about CHAM’s Asset Management Professional Certificate Programs or visit CHAM’s website.

**COMMUNITY ECONOMIC DEVELOPMENT**

**ED101SV Community Economic Development Principles, Practices and Strategies**
Join us for a look at the theoretical base and practical applications of community economic development and learn to define it. You’ll gain an understanding of the goals, guiding principles, and measures of success; examine costs versus benefits of projects; and understand the multiplier effect, capital leakage, and the difference between basic and non-basic industries. Find out what is involved in making distinctions among strategies aimed at affecting the supply versus demand for labor, and how to make informed choices about the use of tools such as business incubators, loan funds, targeted real estate projects, and job training programs. This course features a site visit so you can see community development work in action!
ED120 Commercial Real Estate Development
This course provides a comprehensive look at commercial real estate development, including supermarket and shopping center development and recent efforts to improve access to healthy food in low-wealth communities. We will examine the factors that inhibit retail development in underserved communities and explore the roles that CDCs and public entities can play in encouraging private sector development, as well as undertaking development themselves. Participants will review the role that real estate development plays in community economic development and become familiar with a variety of project types, the real estate development process and the key players on the development team. We will explore the fundamentals of market analysis, the factors affecting demand for retail and office space and the types of leases used in commercial development. Participants will learn the basics of how to evaluate the feasibility of a project and also learn how the value of commercial property is determined. We will evaluate real estate projects from the perspective of private- and public-sector lenders, estimate the amount of debt a project will support, and explore ways to close financing gaps. Several project case studies will be used throughout the course, and you will perform a series of analytical exercises.

ED165 Achieving Economic Development with CDBG Funding
This course is designed to provide participants with a full understanding of the CDBG program and especially how it can be used for a wide variety of economic development programs and projects. We will introduce strategies for making it easier to obtain and use funding. This course will also review the potential benefits of creating a Revitalization Strategy Area (RSA) and being designated as a Community Based Development Organization (CDBO) or Community Development Financial Institution (CDFI). By de-mystifying the rules and regulations, we hope to encourage broader use of CDBG for economic development. You’ll explore the documentation requirements associated with job tracking and other national objectives as well as the circumstances when a “presumption” of low-to-moderate income benefit can be applied. The class will offer an overview of the Section 108 Loan Guarantee program, designed for large-scale economic development projects.

ED212 Short and Sweet for the Long Term - Guerrilla Urbanism
Do you think small, active changes can create long-term impact? Do you think small-scale social capital can instigate large-scale transformation? Do you think small, low-cost and temporary changes to an environment or a community can have long-lasting, permanent effects? If so, then you are already thinking about guerrilla urbanism. Guerrilla urbanism (sometimes referred to as “pop-up urbanism,” or “D.I.Y. urbanism”) theorizes that in order to change the livability of our cities, we need to start small with streets, blocks and even buildings. In this course, we will explore what guerrilla urbanism is; what some of the strategies and tactics are (e.g., tactical place-making, traffic calming and redesign, pop-up commerce incubation, etc.); who some of the drivers of guerrilla urbanism are or can be (hint: you!); and where guerrilla urbanism is most likely to succeed. This is an interactive course that includes case studies, lecture, dynamic group exercises and interactive class discussions.
CB107 Community Engagement and Activation Strategies
What does it take to engage and activate residents in meaningful ways?
This foundational course provides effective strategies and tools to understand how various engagement and activation strategies strengthen communities. Participants will be able to identify personal and societal factors that support and hinder community engagement and activation efforts. Through interactive activities, you’ll recognize the power dynamics influenced by privilege and discrimination on the community and the decision-making structures that impact it. Using the asset-based community development approach we will explore how to engage and activate communities through partnerships, coalitions, and collaborations. The course will help you understand the role of accountability in building trust for community engagement and activation. You will leave the class with a plan that strengthens your current community engagement and activation efforts.

CB108 The Power of Communication: Talking, Listening and Messaging
Have you ever noticed two people saying almost the same thing, but somehow others only remember that one person said it?
That’s because there’s power in how we communicate. Our words and our actions can influence others intentionally and without us even realizing it. The Power of Communication: Talking, Listening and Messaging explores how what we say is as important as how we say it. We’ll think about how community dynamics, stereotypes, and our own individual biases impact what we pay attention to and how we speak. Then we’ll learn about different communication tools that we can use with different groups and in different places. Since it’s important that we’re intentional about how we show up with residents and community members, we’ll practice tools like active listening, group facilitation skills, meeting new people, and talking to groups.

CB116SV Working with Faith-Based Institutions in Community Development
Find out about the role of religious organizations in community economic development, how faith groups mobilize and deliver, and how they and community development organizations can become partners. Learn how religious goals and community revitalization methods complement and challenge each other. Look at proven best practices and recent innovations. Recommended for community development practitioners and anyone interested in faith-based community development. This course includes a field visit. Wear comfortable walking shoes and bring money for lunch.

CB127 The Role of Women in Transforming Communities
From Harriet Tubman escaping slavery and becoming a leading abolitionist, to Dorothy Richardson organizing her Pittsburgh neighbors and founding what became the NeighborWorks network, to your next-door neighbor organizing a childcare program or a community garden, women have been at the forefront of social justice and community development movements. But their contributions have not always been properly recognized and they are often not well represented in influential leadership and executive positions in community institutions. In this course we explore and celebrate women’s contributions to the field, identify the special contributions they can make to organizational culture, and define strategies to support their continued engagement and advancement to leadership roles.

CB310 Understanding the Politics of Policy
Community builders and organizers assist and support communities to create the future they want. Sometimes that future needs help from an “act of Congress,” or the City Council, or planning commission, or school board, or any number of bodies that make policy for the public. This course explores who makes the policies that effect our communities, how policies are made, and what roles individuals and organizations can play in influencing policy – the politics of policy.

COMMUNITY AND NEIGHBORHOOD REVITALIZATION

NR104 Getting Things Done in Neighborhoods through Strategic Collaborations
In today’s world, resources — time, energy and money — are carefully allocated. Revitalization collaborations that combine effective strategy with efficient use of resources will be the most successful. Creating partnerships also helps ensure that revitalization will be sustained in the long run. Learn how to cultivate long-term relationships that help you continue to create win-win opportunities for neighborhood collaborations. Participants will analyze why some partnerships succeed and some fail, and what each sector can bring to the table that others cannot. This course explores how thinking “out of the box” can create maximum rewards for all as you implement your revitalization strategy.
**NR105SV Comprehensive Community Development in Places**

When we assist a household to buy a home or rent an apartment, how much or how little do our community development organizations currently think about the quality of life in the place that household will be living? What are the possibilities for coordinating our own lines of business or the work of multiple partners toward improving things like safety, healthcare access, quality education, good jobs, and other quality of life issues? In this two-day course, participants will have a chance to step back from the day-to-day to think about their organization’s work, and the impact it has on “place” – the area residents live. Participants will learn about the principles of place-based CCD, its history and lessons learned, and a variety of approaches that organizations are taking right now. Practical skill-building includes:

- Assessing the legacy of inequitable policies from the past and present that affect your area of focus today.
- Thinking spatially about program delivery for greater impact.
- Considering how place-based CCD can work in a rural or non-urban contexts.
- Comparing and contrasting models of place-based CCD.
- Identifying roles in a multi-partner CCD approach.
- Obtaining a common language to talk about place-based CCD within your organization.

On Day 2, we’ll visit a local organization implementing a place-based CCD strategy and learn about their approach, partnerships, measures of success and resources. Finally, participants will use a CCD organizational self-assessment tool to identify and discuss where they think their organization is with regard to a set of CCD principles around capacity and practice – and whether and how they might want to refine that approach. This course is designed to frame informed, productive discussions within each organization’s unique mission, programs, and local context. It will provide participants with skills to deepen the impact of their place-based work.

**NR160 Getting Started in Health Equity Work**

This introductory course is designed to expose participants to the broad, interdisciplinary work of Health Equity. It will provide participants an overview of the foundational knowledge that will prepare individuals and organizations to pursue community-based work focused on health equity, social impact, and systems change. In this course, participants will explore a variety of approaches for both understanding and rooting history in order to explore the impact of health on socioeconomic and community outcomes; including the social determinants of health, root cause analysis, ecosystems analysis, and more.

Participants will leave the course with a working draft of a health equity narrative. Note: This course is one of a series of courses on Health Equity Work, which will culminate in a Health Equity Planning document of which the Health Equity narrative is a component. Although not required, we recommend that you take this course prior to NR230 Centering the Community in Health Equity Work or NR260 Community Projects in Health Equity Work for the most optimal experience.

**NR240 Rethinking Reentry: The Role of Community**

At least 95 percent of people incarcerated in state prisons will be released back to their communities at some point. This course presents community development practitioners with practical approaches to implementing effective pre- and post-release strategies. We’ll examine reentry from the perspectives of returning citizens, their families, and various stakeholders throughout the justice system. We’ll also examine the relationship between race, crime, and the criminal justice system with particular attention given to institutional barriers involving race, gender, and social class and bias in the criminal justice system related to arrests, sentencing, and incarceration. This is a unique opportunity to share, learn, and reflect with peers about a critical social issue and community development challenge.

**NR260 Community Projects in Health Equity Work**

In this course, participants will build and develop various pieces to their Health Equity Planning document. Participants will also explore the stages of project ideation, including strategy, implementation, communication, and evaluation. Using peer-to-peer feedback and large group deliberation, participants will leave this course with an outline working draft of their Health Equity Planning document and a plan for continuing the work within their communities.

Note: This course is the culminating piece to the Health Equity work track. Although not required, we recommend you participate in NR160 Getting Started in Health Equity Work and NR230 Centering the Community in Health Equity Work prior to taking this course for a more valuable experience.
**CONSTRUCTION AND REHAB**

**CP131 Introduction to Factory-Built Housing**
Developing projects with factory-built housing often means lower costs, higher quality, and faster delivery times than traditional site-built construction. With funding dollars so precious, why spend extra money on the more expensive types of construction? This two-day course provides both a comprehensive foundation of basic knowledge for the beginner as well as more in-depth subject material for those who already have experience with factory-built housing. Specific topics include:

- Understanding the wide range of types of houses that are built in factories.
- How a house is actually built.
- How to install and finish the house on-site.
- Understanding the wide range of developments your organization can undertake.
- How to finance your project.
- How to prepare a pro forma for your project.

...and much more. Attendees are invited to bring details (e.g., plans, market studies, funding applications, etc.) about their projects in process for individual review by the course faculty.

**CP153 Basic Blueprint Reading**
This course is designed to assist students in reading and understanding residential prints. This is a practical, hands-on beginner-level course suitable for new program staff, project/field staff and management staff who want to increase their knowledge of print reading and construction drawings. A combination of the course manual, working prints, hands-on activities and discussions of print-reading techniques will provide a great introduction to blueprint essentials for those entering the field or needing a rudimentary knowledge of prints.

**FINANCIAL CAPABILITY, HOMEOWNERSHIP EDUCATION AND COUNSELING**

**H0103 Lending Basics for Homeownership Counselors**
This course is designed to introduce homeownership counselors to the basic procedures involved in first mortgage lending. You’ll get a comprehensive overview of loan origination, processing, underwriting, closing and servicing. Conventional and FHA loan products are described along with brief discussions on credit scoring, appraisals, subprime and predatory lending. You’ll also learn how to prequalify potential borrowers, including calculating loan amounts and monthly mortgage payments.

**H0109 Foreclosure Basics for Homeownership Counselors**
This is a beginner- to intermediate-level course and is recommended for counselors and others with less than 12 months of foreclosure intervention counseling experience. Learn the protocols for counseling homeowners in financial crisis. In this course you’ll get a solid grounding on:

- Default and delinquency, including reasons for default.
- Ways to maximize income and reduce expenses.
- Calculating delinquencies.
- Understanding the players in the mortgage marketplace.
- Loss-mitigation options for a variety of mortgage products.
- Legal information about foreclosure laws and timelines.
- Tips on effectively communicating with lenders and servicers.
- Understanding homeowner and lender rights and obligations found in loan documents.

One year of general homeownership counseling experience is recommended prior to taking this course.

**H0110 Introduction to Housing Counseling**
Participants learn the principles and applications of housing counseling from the industry’s and the counselor’s points of view to help them acquire the basic skills needed to be effective in their work. You’ll gain best practices for effective counseling, essential elements of pre- and post-purchase counseling for homeowners, and how to address delinquency and default counseling. You’ll be introduced to common client issues and effective intervention strategies. Participants will take home practical tools to help renters, prospective homebuyers and existing homeowners develop and manage basic household budgets, enhance their savings practices and loan payment, improve credit scores, and recognize and avoid predatory lenders.
H0111 Home Equity Conversion Mortgages
Launch your knowledge of the FHA-insured Home Equity Conversion Mortgage (HECM) product! This information-packed introductory course provides the foundation for counseling senior adults on HECM loan costs, benefits and alternatives. The course offers a detailed overview of the nuts and bolts of this popular reverse mortgage product, hands-on access to product-comparison software, a review of valuable web-based resources and plenty of time to practice your new skills. Designed for housing counselors and other housing, finance or nonprofit professionals new to the reverse mortgage field, this course describes the HECM loan program roles and responsibilities, introduces loan calculations and distinguishes HECM loan features. Qualifying for the HUD HECM Counselor Roster and preparing for the HUD HECM Counselor exam will also be covered. Students new to the world of reverse mortgages are strongly encouraged to take the eLearning course HECM Counseling Basics Overview (H0104el) as a prerequisite to this course. Additional independent study after completing the course will be required to successfully complete the HUD HECM Counselor Exam.

H0200 Ready, Set, Prep: Tackling the HUD Counselor Exam Step-by-Step
Get ready! Set yourself up for success in meeting HUD’s counselor certification requirements by elevating your knowledge in the six essential competency areas included in the HUD Housing Counseling exam, including financial management, housing affordability, homeownership, avoiding foreclosure, tenancy and fair housing. We’ll tackle the HUD study guide step-by-step and provide tools and relevant activities to help you master and memorize content before taking the exam. We suggest pairing this course with Practice, Study, Success: Test Strategies for HUD’s Counselor Certification Exam (H0210), which is designed to help you with practical study and test-taking skills.

H0208 Building Skills for Financial Confidence
Are you wondering what skills are necessary for practitioners to effectively work with customers in reaching their financial goals? What behaviors and attitudes can make a person financially confident? What barriers consumers face in working toward long-term financial security? Attend this 2-day course to gain the most useful and efficient tools to make a real difference in the lives of your clients. You will learn how to facilitate engaging and candid conversations around using appropriate financial products and services, spending, saving, credit, protecting assets and maximizing income. Develop and build your skills in key content areas that will help consumers put themselves in a better position to withstand economic stresses and achieve financial prosperity. Who should attend: financial coaches, financial and housing counselors, program managers, rental housing counselors, and community development professionals.

H0209 Delivering Effective Financial Capability Programs
In this two-day course, participants will build the skills needed for delivering effective financial capability programs. The purpose of financial capability programs is to build customers’ capacity, based on knowledge, skills, and access, to manage financial resources prudently and effectively, so that they reach their financial goals and build financial health. Applicable across a range of financial capability programs, this course focuses on how to deliver programs and services that work. It includes current practices and tools to support customers’ journeys in the program from pre- to post-service delivery. Participants will learn how to better understand their customers. In turn, participants will increase their abilities to engage customers in the program, deliver tailored services that meet customers’ needs, and keep customers motivated to change behaviors and reach goals over the course of the program.

H0210 Practice, Study, Success: Test Strategies for HUD’s Counselor Certification Exam
Freaked out at the thought of taking the HUD Counselor Certification Exam? We hear you, and you are not alone. Conquer your exam anxieties and prepare to rock the HUD Housing Counselor Certification Exam! Join us for this new 2-day course, designed by professionals who have passed the exam. Utilizing the HUD Study Guide, gain confidence and knowledge while learning what you need to know to pass this exam. Practice sample test questions and learn strategies with your peers as you prepare to cram for this exam. Learn time management techniques and a variety of methods to recall information for successful results. Note: this course focuses on testing strategies and practice. Our newly updated and expanded 3-day Ready, Set, Prep: Tackling the HUD Counselor Exam Step-by-Step (H0200) course is recommended as a companion course to help you master the content of the six counseling topic areas.

H0211 Credit Counseling for Maximum Results
This high-energy crash course provides homeownership counselors with the knowledge and skills they need to analyze credit profiles and determine the impact of specific credit behaviors on the credit scoring models used today. Through interactive exercises and case studies based on actual sample files, you will learn how to provide your clients with step-by-step guidance to develop efficient and effective action plans that are targeted to overcoming challenges in past behaviors, and work toward positive credit profiles. This course is a must for the new or experienced counselor who is looking for tools to make credit counseling sessions more structured, efficient and productive.
**H0219 Advancing Homeownership for People of Color**

This course is designed for housing counselors and coaches who work with prospective homeowners who have faced obstacles and barriers primarily based on their race. The focus of the course will be to develop an understanding of the historical and structural challenges that have previously and continue to exist for people of color and give insights into the emotional impacts of discriminatory practices on individuals who have experienced these challenges. Participants will learn innovative and successful techniques to provide support and actionable strategies to assist their clients achieve homeownership. Lecture, interactive exercises and group discussions are used to engage course participants to provide context and tools to their clients.

**H0220 Client Management and Tracking with CounselorMax®**

This hands-on computer course is for beginning CounselorMax users who are responsible for daily client management, tracking and reporting within a housing counseling agency. Participants create and manage client files, learn basic data entry requirements and work on automated case management activities throughout the session, with learning checks producing sample HUD 9902 reports. Functions to ease tracking needs and to use CounselorMax workflows for organizing data are also demonstrated. Through this course you will learn how to use CounselorMax in a way that supports your housing counseling plan.

**H0229 Homebuyer Education Methods: Training the Trainer**

This faculty-led online pre-purchase homeownership education course is designed to teach participants how to design and deliver impactful homebuyer education in a variety of settings. You’ll become familiar with core homebuyer education content and how to tailor your educational approach to your target audience. Learn to use the best materials and methods to train homebuyers on how to assess readiness, shop for a home, get a mortgage loan, improve their budget and credit profiles, and maintain their home and finances after purchase. Participants will engage in hands-on activities that will help them improve their facilitation skills and deliver interactive training sessions based upon effective adult education methodology. Participants should be familiar with mortgage industry terminology and processes prior to taking this class. Lending Basics (H0103) should be taken as a prerequisite should you need to build your knowledge in this area. This course certifies you in homebuyer education delivery, and a post-course exam is required for all participants.

**H0229SP Métodos de Educación para Compradores de Casa: Entrenando a los Instructores**

Aprenda cómo llevar a cabo un programa educacional integral en grupo, basado en el currículo con que las organizaciones de NeighborWorks convierten a miles de posibles compradores en dueños de casa. Aprenda a utilizar los mejores materiales y métodos para guiar a compradores de casa sobre cómo comprar una casa, obtener un préstamo hipotecario, mejorar su presupuesto y perfil de crédito y cómo mantener su hogar y sus finanzas luego de la compra. Los participantes deben estar familiarizados con el proceso y la terminología de los prestamos hipotecarios antes de tomar este curso. El curso HO103 es recomendado como pre-requisito si desea ampliar su conocimiento en la terminología y proceso hipotecario. Luego de completar el curso recibirá un examen, el cual debe tomar y pasar si esta interesado en obtener la certificación para el entrenamiento de compradores de casa.

La presentación y materiales del curso son en español!

**H0247 Post-Purchase Education Methods**

This five-day course covers the recommended standards in design and methodology for post-purchase education programs. The course focuses on topics that help both new and existing homeowners manage their most important asset. These topics include:

- Home maintenance and repair.
- Financial management and budgeting skills.
- Insurance.
- Methods for getting homeowners more involved in their community.
- Early intervention programs to prevent delinquencies and default.
- The pros and cons of refinancing.

Learn how to develop sustainable, effective programs and recruit homeowners in your area to your classes. Participants should be fully familiar with financial education concepts prior to taking this course. An exam is given following the course for those interested in obtaining a Certificate of Professional Recognition in post-purchase education training.
**H0250 Homeownership Counseling Certification: Principles, Practices and Techniques, Part I**

By providing practical applications, this course equips counselors with the necessary skills, procedures, and subject matter expertise to assist new homeowners in achieving success. Participants will gain the skills to conduct personalized counseling sessions that address money management systems, savings, credit history, and debt obstacles to homeownership. Additionally, you will learn how to utilize state-of-the-art industry tools, techniques, and resources to practice various counseling activities, including mortgage readiness and housing affordability assessment, standardized income calculations, and action plan development. The course includes requirements for housing counseling mechanics such as file management, codes of conduct, and operational guidelines for HUD and the National Industry Standards for Homeownership Education and Counseling. To obtain full certification in pre-purchase homeownership counseling, it is necessary to complete both this course and the Foreclosure Basics course (HO109 or HO109e) and successfully pass the corresponding exam(s). Upon completing the course, participants will be equipped with the necessary skills and knowledge to carry out their duties and responsibilities effectively as pre-purchase homeownership counselors.

**H0274 Rental Housing Counseling Certification: Part 1**

This three-day course is designed to provide housing counselors with a comprehensive understanding of all the aspects of rental housing counseling. Participants will leave knowing how to evaluate a client situation regarding rental housing and how to counsel through current rental, new rental or transitioning to rental situations. The course also creates hands on learning opportunities around the topics of renting obstacles, the leasing process, Fair Housing protections, the essentials of being a successful tenant, how to prevent eviction and tips on being a first time landlord. The course will present best practices that are being used in the housing counseling industry and unique tools developed especially for rental housing counseling. It will also give the participant an opportunity to learn through a variety of learning methods, including working with a Rental Counseling Process Model and hands on experience with case study examples. Full certification in rental housing counseling is achieved by completing both this course and the Building Skills for Financial Confidence Course H0208 (H0208 Building Skills for Financial Confidence and passing the exam(s).)

**H0288 Rental Eviction Intervention Certification: Part 1**

Rental eviction has significant impacts on a person’s finances and life. Just over one-third of U.S. households are renters, who are more likely to be young people, people of color, or people with lower incomes. As such, those groups are disproportionately affected when waves of rental evictions occur due to local and national economic events. How can organizations prepare for a rise in rental evictions, and what skills do housing counselors need to help clients avoid rental evictions and reduce the resulting negative impacts? This course will provide counselors with the knowledge, skills, and tools to be effective in working with renters in crisis, navigating the local rental eviction process, and collaborating with landlords, courts, and other social service providers when relevant. By the end of this course, you will have the wherewithal to better support clients in preventing rental evictions and reducing harm when rental evictions cannot be prevented.

**H0310 Financial Coaching: Helping Clients Reach Their Goals**

Financial coaching is an emerging field that supports clients as they work towards goals and strive to maximize their financial potential. Through an ongoing, systematic and collaborative process, financial coaches facilitate changes in clients’ financial habits so that they can reach financial security. In this two-day course, participants will gain an understanding of how to incorporate coaching techniques—including facilitation and listening skills, as well as goal setting and accountability methods—into their financial capability programs by using practical experience and demonstration activities. Participants will learn how coaching differs from and complements counseling, financial education and other services aimed at building consumers’ financial security. This course applies the personal finance content taught in Building Skills for Financial Confidence (H0208) and is a great pairing with that course.

**H0324 Advanced Reporting and Customization for CounselorMax®**

Harness the power of CounselorMax and clearly articulate with quantifiable data the unique story of your organization’s accomplishments! This computer lab course is for individuals who are experienced users of CounselorMax and who are well-versed in all aspects of its functionality. The course shows participants how to MAXimize the value of this client management tool by fully integrating it within an organization’s homeownership counseling services. Participants will learn how to customize data points for an individual organization’s needs and to create customized reports which may be further enhanced using externally available tools to assemble and illustrate the valuable results achieved by your organization. Prerequisite: Client Management and Tracking with CounselorMax (H0220).

To optimize your learning, it is recommended that the prerequisite coursework be taken at a prior training event.
COURSE DESCRIPTIONS

**H0345 Foreclosure Intervention and Default Counseling Certification, Part I**
This advanced-level course is designed for counselors with one or more years of experience providing one-on-one foreclosure intervention and default counseling. The rigorous, in-depth course covers critical elements of the default and foreclosure process as well as loss mitigation options for prime and subprime loans. Participants will engage in exercises and utilize case studies that will sharpen their negotiating skills with servicers and improve their counseling methods with clients. There are two training requirements for certification. This course is Part I. We recommend that participants complete Foreclosure Basics (H0109) or Foreclosure Basics (H0109/e) self-guided online course) first.

**H0360 Homeownership Counseling Certification for Program Managers and Executive Directors**
This course is designed for professionals in the homeownership counseling field who are working at the management level. Through hands-on application you will learn procedures and methodology that will better equip you to manage the day-to-day operations of a housing counseling program. In this course homeownership program managers and executive directors will learn how to:
- Diversify funding sources.
- Recruit, manage and retain counseling staff.
- Perform contract reviews and programmatic assessments.
- Efficiently manage case files utilizing a variety of time management techniques.

A strong focus on quality assurance and proficiency in operating in performance standards, HUD, National Industry Standards, fair housing, ethics, compliance, pipeline review and reporting is included.

**H0380 Compliance Check-up for HUD Housing Counseling Program Managers and Executive Directors**
Are you managing a HUD approved agency and want to be sure you’re ready for your next HUD audit? Do you feel like you have it all under control but would like tips and tools to help you streamline compliance? Then this course is for you! The class gives you resources and checklists for managing housing counseling and education staff, tracking counseling time in the Personnel Activity Report, performing file audits and reporting outcomes that accurately reflect the impact of the work your organization does. We’ll review HUD programs, discuss ways your organization can affirmatively further fair housing, take a detailed look at the HUD 9902 report and get you ready for your next HUD audit. If you are responsible for managing a HUD-approved housing counseling program, or you want to learn more about what it takes to be a HUD-approved agency, join us and learn all you need to help you standardize and streamline the housing counseling process.

**H0385 Using Trauma-Informed Skills in Financial Coaching**
Coming from many sources, trauma is a widespread and common experience that can have long-lasting effects on people’s thoughts and behaviors. Those effects can deter people from engaging and staying in financial coaching services. For people and communities faced with poverty, racism, and other chronic stressors, trauma may be more prevalent due to systemic and personal harms. Creating a trauma-informed environment in your financial coaching program increases inclusion – helping organizations to realize more equitable financial outcomes for people who have been impacted by toxic systems and who face multiple barriers to financial well-being. A trauma-informed environment acknowledges how pervasive trauma is and consistently responds in ways that build safety and trust for clients throughout the program. This course will provide financial coaches with the knowledge, skills, and tools to be trauma-informed when working with clients in an immediate financial crisis or experiencing longer-term financial insecurity. Financial coaches will practice the principles and practices of being healing-centered and how that approach aligns with the proven strategy of financial coaching in facilitating financial stability and well-being.

**H0388 Rental Eviction Intervention Certification - Design and Delivery**
Rental eviction intervention programs are designed to help clients avoid rental evictions and minimize harm when rental evictions cannot be prevented. A range of program models exist that build on an organization’s capacity and meet the local community’s needs. Common components, offered holistically by one organization or via partnerships with multiple entities, include outreach, counseling or coaching, financial assistance, legal services and wraparound services. In this program design course, participants will explore different program models and best practices for offering eviction intervention services that suit local needs. Participants will examine their organizations’ capacity and identify how they will conduct outreach, develop partnerships, track outcomes, and plan for sustainability.
**NONPROFIT MANAGEMENT AND LEADERSHIP**

**ML120 Strategic Thinking and Planning**
This course focuses on why strategic thinking and effective planning are vital to organizational survival and success. You’ll learn about the skills used in strategic thinking and will have an opportunity to practice these skills through interactive activities and case studies. The course covers the steps involved in organizational strategic planning and provides tools and examples you can take home and apply. Emphasis will be on the integration of strategic thinking and planning practices at all levels of the organization to adapt to rapidly shifting trends and forces in real time. Ideal attendees include executive and senior management staff members, board members, and staff members of nonprofit organizations.

**ML130 Human Resources Management and Development**
This course provides a framework for understanding and thinking strategically about employment relations and the management and development of staff. Specific topics include recruitment, interviewing and hiring, labor laws, performance evaluation, compensation and benefits, promotion, job design, staff development and training, retention and turnover, and leadership succession planning. Designed for both Human Resources professionals as well as executives, directors, managers, and others who work to understand the most important assets to any organization: the people.

**ML145 ABCs of Managing Projects and Collaborators**
Community-based projects often bring together diverse stakeholders and partners with a variety of needs and contributions. Whether your project team consists of members of your organization, community partners, or volunteers, working collaboratively has both advantages and challenges. Effectively managing projects includes demonstrating both strong organizational and interpersonal skills that create results. How can you drive effectiveness and efficiency within these diverse groups? How can you best manage the strengths of your team to reach its goals? How can you help prepare a team for the developmental stages they will encounter while working together? This course uses participatory learning to introduce key components of project management, explore how individual strengths impact group performance, and offer a new lens to approaching your current projects. This course welcomes both veteran project staff who are looking to innovate the way they do things and professionals who are newer to collaborative processes.

**ML162 Marketing Your Programs and Organization**
Marketing is integral to any organization’s achieving its business goals. Dynamic leaders must understand their audiences and present and sell their “product” well. Using case studies, real-world examples and small-group exercises, learn how to better market your organization and its programs to donors, clients and partners. This interactive course also covers target audiences, research and analysis, products, messages, strategies and tools, training, timetables, budgets, and monitoring and evaluation processes. Participants will leave the course with a marketing plan outline, ready for presentation to and feedback from organizational leadership.

**ML172 Fundamentals of Sustainable Funding: Engaging Individual Donors**
Engagement of individual donors can be a daunting concept for many nonprofits. Faced with a small professional staff and a board of directors that plays a limited or no role in fundraising, how do you even begin? In this course, we will explore how to develop an agency-wide culture of philanthropy, and the steps necessary to engage in individual solicitations. Through interactive exercises, participants will analyze the strengths and weaknesses of the fundraising culture in their agencies, explore current trends in the fundraising field, identify target constituencies, explore the relationship between storytelling and asking, and role-play actual solicitations.

**ML173 Grant Proposal Writing**
Becoming a successful grant writer requires skills above and beyond simply writing. Grant writers must also possess an understanding of organizational development, research, finance, strategic planning, program design, time management and knowledge of area resources. This introductory and hands-on course is designed specifically for individuals with very little or no previous grant writing experience. It provides an overview of the proposal development process, including how to identify a grant opportunity and write a solid proposal meeting the funder’s requirements.

**ML210 Operational Strategies for Organizational Success**
Community-focused organizations are expected to operate as efficiently as possible, while simultaneously generating measurable outputs, outcomes, and impacts. Join us for this interactive course, where we will learn tools for understanding and contextualizing your organization’s operations management roles, responsibilities and relationships, as well as methods for establishing, managing, and streamlining processes and procedures. Develop tactics for practical planning and execution, including forecasting metrics to reflect needs and results. Explore best practices in both creating and enhancing quality assurance systems and in instituting a culture and process for continuing improvement. This course is ideal for EDs, CFOs, COOs and any managers who supervise staff.
**ML229 Emotional Intelligence (EI) at Work**
The rapidly changing world of neuroscience has given rise to concepts of multiple types of intelligence, including emotional and social intelligence. Success in an organization is no longer solely defined by task skills, abilities and traditional leadership models. Self-awareness of our emotions and those of others is critical to building healthy organizations. In this introductory- to intermediate-level, hands-on course, we will discuss what emotional intelligence is, examine the basic neuroscience behind the model, and assess EI competencies. We will identify how emotional intelligence impacts both the business of our organizations and our daily working environment. Participants will discuss how EI can strengthen leadership roles and build better teams, as well as learn ways that their EI capacity can be strengthened over time.

**ML240 Board Oversight and Governance**
This course is targeted to both new and experienced board members, as well as to nonprofit CEOs and executives who interact with board members. Working together with your peers in an interactive approach to learning, participants will walk away with valuable new information, strategies and tools to maximize board impact, including:

- Basic responsibilities of nonprofit boards and individual board members.
- How to set up structures, including committees, that truly work.
- Tools to build and maintain relationships among board members, the board chair, the executive director and staff.
- How to measure the effectiveness of the board and the organization.
- How to select, evaluate, support and, if necessary, replace the executive director.
- The board development cycle, including succession planning.
- Financial oversight.
- How to develop and conserve the organization’s resources, both funds and property.
- Leading and engaging an equitable and inclusive organization.
- How to set the organization’s mission and overall strategy, while including key stakeholders.
- How to be an effective ambassador to the community.

**ML242 Leading and Engaging an Equitable and Inclusive Organization**
In recent years many nonprofit organizations have stepped more fully into building a more inclusive and equitable society, beginning with a commitment to doing so in their own organizations. Yet the multiple dimensions of systemic inequities make this work challenging for even the most committed leadership and organization. This one-day course is designed to share innovative practices and approaches for strengthening diversity and inclusion. The course builds upon a framework found in a number of equity statements and draws upon the experiences of class participants exploring strategies for increasing workforce diversity, deepening inclusion and strengthening community engagement.

**ML252 Money and Mission: Ensuring Effectiveness and Sustainability through Successful Financial Leadership**
Nonprofit leadership requires the models, skills, and strategies for successfully leveraging an organization’s financial processes to advance its mission goals. This practical, hands-on seminar covers financial leadership and strategy, financial planning and architecture, financial reporting and communication, and organizational integrity and sustainability. In this course you will:

- Learn to integrate the financial, programmatic, operational, and leadership efforts of your organization for a richer understanding of the organization’s impact.
- Strengthen how financial information is used to support mission-focused decision-making.
- Review strategies that ensure that organizational leaders account for and allocate resources to effectively fulfill mission today while also reinforcing sustainability moving forward.
- Learn to work with your leadership team and other peers to develop strategies for implementing change, to strengthen the financial systems, processes, and communications that support organizational success.

Participants will develop a Financial Leadership Action Plan throughout the seminar, leaving with clear action items and next steps for their organizations. The greatest benefit is to organizations that bring a team of senior staff and volunteer leaders to the course. Recommended team members include Treasurer or Board Chair, Chief Executive (Executive Director), and the senior finance staff position (e.g., CFO, COO, finance director, office manager).
ML282 How to Negotiate: The Most Important Skill You Will Ever Learn!
Improving our communication skills is a lifelong commitment. The ability to come to mutually acceptable agreements with other people is a skill that is applicable in our professional and personal lives. During this intermediate-level course, you will learn a series of negotiation skills that you will be able to apply in a variety of situations. You will be able to conduct negotiations with confidence, become a better leader and team builder, create stronger negotiating positions, adjust your negotiation style for different situations and improve relationships. We will have opportunities to apply the negotiating tools through a series of practice negotiations based on real scenarios we are facing in our work.

ML284 Influence Without Authority: Persuasion Skills You Never Knew You Had!
Discover how to influence, motivate and lead individuals and teams to resolve issues and meet project goals efficiently, effectively and collaboratively. ML284 is designed to help participants understand their own sources of influence and how to influence clients, colleagues and teams even when you don’t have the authority to mandate compliance. We will look at proven tools and frameworks including relationship mapping, the ladder of understanding, and knowing your influence currencies as well as theirs. This highly interactive course will assist you in creating a personal action plan to implement when you return home.

ML285 Coaching for Transformation
Coaching is a partnership that capitalizes on an individual’s existing strengths and increases their understanding of personal impact to maximize their human potential. The coaching relationship fosters the development of new skills and awareness that will make individuals more effective in work and in life. Coaching can be formal and highly structured or an informal dialogue, and the skills can be used in diverse settings, including resident services, leadership and management. In this course we will learn about and practice the core principles of transformative coaching to help people move forward in a variety of situations.

SINGLE-FAMILY AND SMALL BUSINESS LENDING

LE210 USDA Section 502 Direct Loan Application Packaging: Affordable Rural Homeownership
This three-day advanced course will cover USDA Rural Development’s Section 502 direct loan program and provide invaluable insight as to how this homeownership financing resource can be utilized in your community. Learn how your organization can assist potential borrowers and work in partnership with RD staff in your state to deliver successful Section 502 loan packages. Through the course, designed for those experienced in using Section 502, participants will learn the regulations and practical applications of the loan program. Participants will develop a strong understanding of 502 direct underwriting and packaging standards, which will ensure that submitted loan dockets are complete and accessible for processing. Please bring a laptop to class. This advanced course is not open for those without experience in working with this program.

LE225 How to Ensure Compliance in Single-Family Lending
The regulatory climate for the mortgage industry is always evolving and often challenging to understand. A key component to the success of your single-family lending program is maintaining compliance with these sometimes complicated laws. This intermediate course will provide you with the guidance you need to ensure you and your organization are fully compliant in the area of residential mortgage lending. Together, we’ll review and strategize around:
- Federal mortgage lending regulations and how they apply to your operation.
- Key components to create and ensure ongoing compliance.
- Quality control compliance plan -- what do we need, why, and how do we build it?
- Other considerations and implications for your business related to compliance.
You’ll leave with the confidence you need to run and grow your program!
over the past decade, the intersection of health, housing and community development has forged groundbreaking partnerships, infused fresh capital resources, and introduced innovative programs and services aimed at bolstering community health and overall well-being. Even with these successes, the pandemic demonstrated there is still more to be done to make sure that everyone has a fair and just opportunity to be healthy. In many places the opportunity to live healthy, fulfilling lives is still limited by social and institutional inequities such as poverty, discrimination and racism.

In working to create communities of opportunity where people thrive, our experience at NeighborWorks has demonstrated the importance of centering the voices of the people who are closest to solutions. This requires creating space for co-creation between residents and cross-sector partners. As we approach the next decade, we need to accelerate resident-driven health equity approaches that align strategies, partnerships and resources around transformative community visions.

Join us in exploring the future of resident-led strategies across health, housing and community development. We will elevate lessons learned, identify critical trends and share perspectives on a critical question facing the field:

How do we center the voices of residents and accelerate community transformation to create thriving, healthy places?

Using emergent learning as our frame for the day, this symposium will actively engage community leaders, experts in the community development and health fields, and partners from across sectors in identifying new, actionable opportunities. Together, we will:

- Celebrate recent accomplishments and stories uplifting resident voices and solutions at the intersection of health, housing and community development.
- Surface key insights from each other on how we drive community transformation to meet today’s needs and opportunities.
- Imagine new possibilities and narratives that can result from centering community priorities in our efforts to achieve greater health equity.
- Identify actionable and transformative strategies – both for the near-term and the future – that we can each employ to create healthy, vibrant places of opportunity.
- From our conversation, we will co-create a new future for collaboration at this intersection and pinpoint key actions we can collectively take to center health equity and create thriving communities!

This event is designed for:
Health, affordable housing and community development practitioners and their community stakeholders who have been working at the intersection of health and housing or are new to this intersection. Interested participants include:
- Community development nonprofit leaders and staff.
- Practitioners working to advance health equity.
- Resident leaders who are interested in advancing health and creating healthy communities.
- Health partners.
- Philanthropic partners.
- Community partners.

WHAT IS HEALTH EQUITY?
Health equity means that everyone has a fair and just opportunity to be as healthy as possible. This requires removing obstacles to health such as poverty, discrimination and their consequences -- including powerlessness and lack of access to good jobs with fair pay, quality education and housing, safe environments, and health care. (Source: Robert Wood Johnson Foundation)

WHAT IS COMMUNITY-DRIVEN LEADERSHIP?
Community-driven leadership is a core principle of NeighborWorks’ comprehensive community development work. We know communities are more equitable and inclusive when leaders with lived experience have the resources and support to drive action and change. As complex issues continue to face communities across the country, community leaders are and will continue to have an essential role in strengthening communities. (Source: NeighborWorks America)

WHAT DOES “CENTERING VOICES” MEAN?
Uplifting, trusting and valuing the lived experiences of the people most impacted by the issues and inequities you want to address. This includes working towards approaches in which those who are most impacted are a part of leading, identifying solutions, setting priorities and shifting narratives. Shared actions then need to be identified and implemented to disrupt the reproduction of inequities and their impacts. (Source: University of Wisconsin Population Health Institute and the Wisconsin Healthiest State Initiative)

ROUND OUT YOUR WEEK OF LEARNING WITH THESE NEWLY CREATED COURSES:
- Getting Started in Health Equity Work (NR160) – Monday-Tuesday
- Community Projects in Health Equity Work (NR260) – Thursday-Friday
We’ve been intentional and analytical about including expert instruction in the NeighborWorks Training Institute. But peer learning and networking informally with colleagues, and focusing on personal growth, is also important—it encourages a relaxed, positive and open mindset and truly brings your learning to life! Check out the fun and impactful activities we’ve built into the timeslots around course offerings—and be sure to add these activities to your schedule as time permits.

We’ll be adding new workshops, roundtable discussions, and other opportunities to connect with fellow learners. So, check back regularly on the event platform and be on the lookout in San Francisco for sessions and fun activities to enhance your professional learning experience.

**Ongoing Beginning Monday › Fill Our Neighborhood**
Stop by the East Lounge on the Ballroom level of the Hilton Union Square to help us fill our neighborhood with words of inspiration.

**Ongoing Beginning Monday › Walking Challenge**
Put on your walking shoes and explore the street of San Francisco while getting your steps in and competing for prizes. Log your steps Monday through Thursday, and the winner will be announced Friday. Be sure to sign up for the walking challenge on the event site — pre-registration is required.

**Monday 11:30 a.m. – 12:45 p.m. PDT › Opening Plenary**
Join us for an exciting opening plenary to kick off the week. You’ll get the scoop on what’s in store at this event - and beyond. You’ll also hear about the latest resources and personal development opportunities, and you’ll have a chance to connect with NeighborWorks Training staff. More details, topics, and speakers to come, so save the time slot! Lunch will be provided.

**Sunday 3:00 p.m. – 5:00 p.m. PDT › Scavenger Hunt**
Join us for a fun scavenger hunt and compete for prizes while exploring your “home” for the week and meeting your fellow participants. Stop by the East Lounge on the Ballroom Level of the Hilton Sunday to learn more about this activity. No need to pre-register for this activity — just show up.

**MONDAY WORKSHOPS**

4:30 p.m. – 6:30 p.m. PDT

**Amplifying Our Voices: Strategies and Resources for Affordable Housing Advocacy**
This workshop, National Low Income Housing Coalition (NLIHC), will delve into effective strategies for engaging with federal, state, and local elected officials to champion affordable housing initiatives. Attendees will discover how to craft compelling narratives that resonate with policymakers, combining the power of data and storytelling. The workshop will provide an in-depth look at NLIHC’s Gap and Out of Reach data, shedding light on the alarming shortage of affordable homes and the profound impact of the affordability crisis on our lowest-income renters. Attendees will also learn how to harness this data to make a persuasive case for increased housing investments. The presentation will also provide an update about the current state of housing policy on Capitol Hill and guide advocates on how to get involved in ongoing federal advocacy efforts.

**$5,000 Education Awards Available to Advance Your Career and Skillset with a Master’s Degree in Community Development or Public Administration at the Carsey School**
Learn about two 100% online master’s degrees in community development or public administration designed for working professionals. These practical and applied degrees can be completed in just 12-16 months. Expand your career options and grow your professional network while learning the practical skills to increase your community impact. Qualified employees and board members of NeighborWorks and NeighborWorks member organizations are eligible for up to $5,000 in Education Award tuition discounts. Attend to learn more about the curriculum, courses, schedule, student cohorts, education awards, and the Carsey School.

**The Latest HUD Updates: Our Continued Efforts and MORE...**
Join us to hear from HUD representatives about what’s happening on the housing front. You’ll get the latest information and updates on the many exciting things going on at HUD, news on the “Let’s Make Home the Goal” campaign, and you’ll have an opportunity to ask questions during a Q&A session!
MONDAY WORKSHOPS

4:30 p.m. – 6:30 p.m. PDT

Join Bank of America to Learn How to Help Your Clients Make Homeownership a Reality

Join Bank of America to learn about the affordable solutions we offer housing counselors to assist clients in overcoming the barriers to homeownership. We will share a variety of resources made possible through our Community Homeownership Commitment program, including:
- Low down payment options
- Proprietary grant programs
- Our special purpose credit program (available in select markets)

Together, we can help make homeownership a reality for modest income and underserved borrowers and communities.

TUESDAY WORKSHOPS

12:00 p.m. – 12:45 p.m. PDT › Grab Your own Lunch and Meet and Greet the Northeast Region

How often do you say to someone, “Let’s meet up at the NTI,” and then you never do? Here is your chance! Bring your lunch and network with colleagues and NeighborWorks staff from the northeast region (New England, NY, NJ, PA, DE, Puerto Rico, and the Virgin Islands). Hope you join us!

4:30 p.m. – 5:15 p.m. PDT › Y’all Come Meet the Southern Region!

Come meet and network with attendees and NeighborWorks staff from the Southern Region (Maryland, Virginia, North Carolina, South Carolina, Georgia, Kentucky, West Virginia, Alabama, Mississippi, Arkansas, Tennessee and Washington, DC). We look forward to connecting with you!

4:30 p.m. – 5:15 p.m. PDT › Join Colleagues and Friends in the Western Region

Please join us for a celebratory meet-and-greet with the western region at the Training Institute! If you are from Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, New Mexico, Nevada, Oregon, Utah, Texas, Washington or Wyoming, come out and meet your peers, celebrate your organization’s successes, and share what’s on the horizon with the NeighborWorks America Western Region team.

4:30 p.m. – 6:30 p.m. PDT

Realizing and Keeping the American Dream: Exceptional Homebuyer Resources

This afternoon workshop will provide you with additional ways to support your organization’s efforts to deliver effective pre- and post-purchase education to your clients and your communities through discussions and demonstrations. Get answers to questions about these popular tools and learn new strategies from your peers. See you there!

The CounselorMax® and NeighborWorks Compass® Strategy

This session will give you an update on the strategy that NeighborWorks America is undertaking to create a premier client management system for our network and the housing counseling industry. It will cover our current system, CounselorMax, and how we’re maintaining it, and will highlight our latest work and milestones to strive and ultimately thrive as the client management system of the future with NeighborWorks Compass. Our current and future customers will also have the opportunity to engage with the NeighborWorks Compass and CounselorMax leadership team during a live Q&A session.

Supporting Houseless and Formerly Houseless People in Our Communities - Roundtable Dialogue

More affordable housing developers are building permanent supportive housing developments to support the growing number of people and families who are houseless and have high needs. Resources and financing are prioritizing development of supportive housing for people with high needs, but often, costs are outstripping incomes for these properties. Come join a peer dialogue on how organizations are meeting these growing needs and the impacts on organizations who are stepping up to address the crisis – from staffing, resident services, insurance and asset management.
REGISTRATION INFORMATION AND EVENT POLICIES

At NeighborWorks America, we are committed to providing an equitable, inclusive, respectful and supportive professional learning experience for all participants. Above all, our policies and procedures facilitate an environment that encourages diverse perspectives and the open exchange of ideas so that everyone can grow. We appreciate your adherence to these policies and procedures, and the part you play in ensuring a successful event experience. If we can be of assistance, email us at nti@nw.org or call us at 800-438-5547.

REGISTRATION
Register online at [https://collabornation.net/sfnti2024](https://collabornation.net/sfnti2024) by Monday, Jan. 29, 2024. If you do not require lodging, you can register on-site based on course availability.

SCHOLARSHIPS
Limited scholarship assistance is available to nonprofit organization staff. For more information, visit [NeighborWorks.org/scholarships](http://NeighborWorks.org/scholarships).

PAYMENT POLICY
Prices for courses are listed on the grid on page 5. Credit card payment is required at the time of registration. To arrange payment by check or to arrange group registrations, please email or call us. Staff of the 240+ NeighborWorks Network Member Organizations receive discounted course tuition pricing (30% or more) directly applied to your checkout cart. Please be sure to select Network Member and your organization from the official pull-down list when creating your registration profile to receive this benefit.

AMERICANS WITH DISABILITIES ACT
Please contact our Customer Response team no later than January 29, 2024 at nti@nw.org or call 1-800-438-5547, if you have special needs under the Americans with Disabilities Act related to your NeighborWorks Training course or your event lodging needs, if your reservation was made by NeighborWorks Training.

EVENT LODGING
General admission attendees can book their own lodging at the event hotels on a first-come/first-served basis. Instructions will be included in the Travel and Logistics Guide accessible in the virtual event platform after you register. Registrants whose package includes lodging will have lodging booked for them at event hotels and can check their NTI Schedule/Itinerary in the virtual event platform after Tuesday, Feb. 6, 2024.

REGISTRATION CHANGES
Registrants may make course exchanges directly in the virtual event site until Jan. 29, 2024. Changes may only be done for a course taking place on the same days and for the same monetary value. For all other changes, please email or call us.

CANCELLATIONS/REFUNDS
Please cancel in writing via email by no later than Monday Jan. 29, 2024. Cancellations after Jan. 29, 2024, will not be entitled to a refund.

TRAVEL AND MEALS
Meals are not served and are at your own discretion. The event does provide a minimum of two coffee/beverage breaks are provided each day. Please see the event travel and logistics guide for event specific details. If NeighborWorks does cover your travel, instructions on how to book travel will be included in the Travel and Logistics Guide available in the virtual event platform. Please visit [the event resources page](http://NeighborWorks.org/sfnti2024) for details on the event policies and liability waivers, Code of Conduct, COVID-19 Policy, FAQs, Travel and Safety Tips, and other helpful information.

COURSES
Courses are from 8:30 a.m. — 4:00 p.m. daily with the exception of Friday in which courses will end at 1 p.m. To earn a certificate you must attend 100% of the course, so book your return flight accordingly.

HEALTH, SAFETY AND EVENT CONDUCT
NeighborWorks staff and event vendors are on hand to ensure the comfort and safety of all event participants. Participants assume all risks related to event participation, including anything related to COVID-19 and will be asked to agree to health, safety and code of conduct protocols at the time of registration. Participants who do not adhere to protocols will be asked to leave the event with no refund. Please visit [the event resources page](http://NeighborWorks.org/sfnti2024) for details on the event policies and liability waivers, Code of Conduct, COVID-19 Policy, FAQs, Travel and Safety Tips, and other helpful information.

PHOTOGRAPHY AND SHARING OF PERSONAL INFORMATION
By attending this event, you consent to being photographed incidentally. We will not generally share your contact information unless it is needed to provide you with services related to your event attendance.

For more event information visit: [NeighborWorks.org/sfnti2024](http://NeighborWorks.org/sfnti2024)

For customer support reach us at nti@nw.org or 1-800-438-5547.

KEY EVENT DEADLINES:
- January 29, 2024: Registration Deadline for in-person event
- January 29, 2024: Last day to make course changes for the in-person event
- January 29, 2024: Recommended last day to cancel from the event if your plans have changed
We’re committed to supporting the important work you do and furthering the impact of our field. To keep your skills sharp and to discover new approaches to improving the lives of your community residents, plan to join us for these exciting events. You’ll go home with guidance from experts, updated strategies, and the inspiration and peer contacts to put it all to work.

**VIRTUAL TRAINING INSTITUTE - MAY 6-10, 2024**
Choose from over 70 webinars, one-week workshops and multi-week faculty-led courses - with no travel budget required and in the comfort and convenience of your home or office.

**NEIGHBORWORKS TRAINING INSTITUTE - PITTSBURGH, PA - AUGUST 26-30, 2024**
Come to where it all began for NeighborWorks, and share in the culminating event of our 45th anniversary. You’ll find more than 70 in-person courses of 1-5 days, plus:
- Workshops on the latest industry trends and topics
- A special Tech Showcase that highlights technology to improve your workflow and enhance your impact
- Regional meet-ups and other activities that facilitate connection with your peers and friends
- Additional opportunities for professional and personal growth
- FUN!

To stay updated on these cornerstone events, as well as regularly scheduled online training offerings throughout the year, check back at NeighborWorks.org/Training.