ONLINE TRAINING EVENT » COMPLETE WITH:

WEDNESDAY SYMPOSIUM
Advancing Equity for People of Color: Local Solutions for Housing Stability

› Webinars
› Timely workshops
› Networking and best practice-sharing
LOOKING AHEAD TO THE POSSIBILITIES AND POTENTIAL OF 2023, make plans to spend a week in February with us at the NeighborWorks Virtual Training Institute. This national online event presents a great opportunity to refresh skills, learn about new trends in our sector and give yourself some time to think about new strategies that could work for you.

Over the course of a week, you’ll have access to almost 80 intensive courses, personal and professional growth options and abundant peer learning and networking opportunities, all in the comfort of your home or office. Hard to believe that so much productivity can happen in the winter months!

Check out the event schedule on page 5. We’ve assembled a collection of expert-led courses that bring you the latest strategies and solutions for the important work you do. Some of the exciting new offerings we’re especially proud of:

- AH010wt Shared Equity: More than One Way to Own a Home
- AM003wt Deferred Maintenance and Capitalization
- CB008wt-CB009wt Understanding Public Policy series
- NR009wt Comprehensive Community Development: Why It Matters
- NR010wt Revitalizing Communities through Clean Energy and Climate Resilience
- H0046wt-H0049wt How to Talk to Your Client About... series
- ML020wt Top Staff Retention Strategies in The Great Resignation
- ML170vc Laying the Foundation for Fundraising

As with every training institute, we will host a special Wednesday symposium. This event’s session kicks off a year-long theme: Advancing Equity for People of Color. Over the course of the virtual and in-person institutes this year, we’ll have a series of three connected symposia that focus on critical aspects of equity. At the VTI, our session covers housing stability – how centering resident voices and tailoring solutions to the local community advances equity and maximizes impact.

As you build your course schedule, be sure to reserve time for all the practical and fun informal growth sessions we offer each day. These sessions will allow you to connect with colleagues and peers, and will truly bring your week of learning to life. From roundtables on the latest challenges to afternoon workshops on new programs to sessions on yoga and financial wellness, we know you’ll find topics of interest.

Our virtual training institutes have brought thousands of professionals from around the country together to learn and grow at a time of year when travel to an in-person event just isn’t as easy or convenient. And participants have rated them highly for both content and logistics:

“I was pleasantly surprised with the quality of the virtual training. I was able to participate in several training options and come away with tools and resources I could share with staff without having to wait until returning from a trip. This kept the momentum going from what was learned.”

“...The ability to access the recordings was a great feature. Being able to print or download information was another great feature.”

“I’ve already implemented the knowledge from the trainings into my daily work.”

“...An awesome array of speakers who are loaded with experience and information.”

This event will be no exception – it’s a perfect venue for enhancing your productivity as well as your career prospects, and learning while saving your budget for the busy year ahead.

We look forward to connecting with you online!

Marietta Rodriguez, President and Chief Executive Officer
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THANKS TO OUR SUPPORTERS

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U.S. Department of Housing and Urban Development
HOW TO BUILD YOUR WEEK OF LEARNING

The Virtual Training Institute gives you a cost-effective, convenient way to build your skills and stay close to your work at the same time. Here’s how to make sure you maximize the value of the event:

1. CHOOSE YOUR EXPERT-FACILITATED COURSES

We’ve put together a selection of all-new and updated courses that help you navigate our challenging time. Consider the current and future needs of your organization and your community—and don’t forget your professional development goals! Courses are offered in a number of content areas and course types to match your preferred learning style.

**wt** - Courses designated with wt are webinar training courses. They provide:

- 90 minutes of fast-paced, intensive instruction
- Ability to ask questions of expert faculty
- Learning checks
- Downloadable resources
- 1.5 hours of continuing education credit

**vc** - Courses designated with vc are faculty-led courses. They provide:

- In-depth exploration and education on an important topic
- Course content spread over 3-4 weeks according to your schedule, along with a weekly live session
- The ability to interact with your peers and expert faculty to explore your organization’s unique situation
- A variety of online tools to enhance your learning and facilitate your coursework

**wk** - Courses designated with wk are one-week workshops. They provide:

- Content presented in daily lessons over the course of five days
- Self-paced online assignments—approximately six hours of course-related reading and assignments
- Use of peer discussion forums to keep you connected to peers and faculty
- CEUs and certification credits are noted in the course descriptions.

**SYMPOSIUM:** An in-depth exploration of an important, timely topic in housing and community development. This dynamic event comprises keynote speakers, panelists, and other sessions and presents thought-provoking content and innovative strategies and replicable approaches. The event is presented in one 4-hour session and does not have a quiz or certificate.

*NOTE:* Due to the time commitment associated with one-week workshops and faculty-led courses, for this event registrants are limited to two (2) one-week workshops OR faculty-led courses.

2. ADD IN PEER LEARNING AND NETWORKING SESSIONS

We offer peer learning and professional networking that bring your coursework to life and enhance your career prospects at the same time. A variety of offerings, including topical moderated roundtables, informational speakers, and group activities that give you a chance to bond with fellow participants. Times vary, and there are no quizzes or certificates. For evolving networking offerings and details, visit NeighborWorks.org/NWWinterVTI.
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<th>Session Title</th>
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<td>8:00 A.M.</td>
<td>Opening Plenary</td>
<td>Session hosted by event organizers, setting the stage for the conference.</td>
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<tr>
<td>9:00 A.M.</td>
<td>Keynote</td>
<td>Presentation by a distinguished speaker on a relevant topic.</td>
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<td>10:00 A.M.</td>
<td>ROUNDTABLE: Resilience and Sustainable Development</td>
<td>Discussion among peers on resilience and sustainable development strategies.</td>
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<tr>
<td>10:45 A.M.</td>
<td>HOT TOPIC: Social Media</td>
<td>Special session on the impact of social media in contemporary society.</td>
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<tr>
<td>11:30 A.M.</td>
<td>WORKSHOPS: Using the American Rescue Plan for Multifamily Housing</td>
<td>Workshops on how to apply the American Rescue Plan to multifamily housing.</td>
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<tr>
<td>12:00 P.M.</td>
<td>LUNCH</td>
<td>Lunch break to allow participants to network and engage in informal discussions.</td>
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<tr>
<td>1:00 P.M.</td>
<td>AFTERNOON WORKSHOP: Introduction to the HUD Certification Exam Prep Series</td>
<td>Introduction to the HUD Certification Exam, preparing for upcoming exams.</td>
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<tr>
<td>2:00 P.M.</td>
<td>ROUNDTABLE: Tips, Tools and Techniques for Talking About Loan Originations</td>
<td>Roundtable discussion on strategies for effective communication about loans.</td>
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<tr>
<td>3:00 P.M.</td>
<td>BREAK</td>
<td>Brief break to refresh and prepare for the rest of the conference.</td>
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<tr>
<td>3:15 P.M.</td>
<td>ROUNDTABLE: Working with Clients for Stewardship and Community Development</td>
<td>Roundtable discussion on working with clients for stewardship and development.</td>
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<td>4:00 P.M.</td>
<td>BREAK</td>
<td>Another brief break to allow participants to stretch and recharge.</td>
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<td>4:15 P.M.</td>
<td>WORKSHOPS: Helping Clients Understand Foreclosure Tune-Up</td>
<td>Workshops on how to help clients understand the foreclosure process.</td>
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<td>5:00 P.M.</td>
<td>BREAK</td>
<td>Final break before networking event.</td>
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<tr>
<td>5:15 P.M.</td>
<td>NETWORKING: Speed Networking</td>
<td>Speed networking event to connect with peers and potential partners.</td>
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<td>6:00 P.M.</td>
<td>BREAK</td>
<td>Final break before dinner.</td>
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<td>6:30 P.M.</td>
<td>DINNER</td>
<td>Dinner to cap off the day and encourage networking.</td>
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<tr>
<td>8:30 P.M.</td>
<td>CLOSING PLenary</td>
<td>Session hosted by event organizers, summarizing the day and looking forward.</td>
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AFFORDABLE HOUSING DEVELOPMENT

AH001wt Basic Feasibility Questions for Affordable Housing

In this course we will pose dozens of questions that need to be answered before pursuing an affordable housing project. Every organization is different, and no two projects are the same, but the same basic feasibility questions need to be answered by all to insure a successful outcome. We will look at organizational readiness, community support, and project siting issues as well as funding and finance. We may not have all the answers, but we do have all the questions!

AH003wt What Makes Lease-Purchase Programs Succeed or Fail?

Based on surveys and interviews with numerous lease-purchase programs around the country, we collected the important lessons learned on why lease-purchase programs fail and what the necessary components are of a successful lease-purchase program. During this webinar, we’ll provide an overview of the basic elements for success and explore the resources that are readily available. You’ll get the information you need to help you decide whether this strategy is right for your community.

AH004wt Shared Equity: Introduction to Stewardship

This webinar will cover all of the essentials of managing a shared equity housing program, from program planning to program solving—with an emphasis on the implementation of proven stewardship activities that will help assure the success of your owners, the quality or your portfolio and the viability of your program overall. You will be introduced to the entire stewardship toolbox and come away with an understanding of how to effectively adapt these tools to the culture and capacity of your own organization and community.

AH005wt The Language of Lending and Borrowing

There is much communication around describing proposed projects and understanding the funder’s programs and requirements. However, the right kind of communication is extremely helpful in gaining loan approval. This course is an introduction to the terminology commonly used in the loan underwriting process. By taking the time to first understand the basic vocabulary of loan underwriting, you’ll find that the rest of the learning process becomes much easier. That is our main goal here: making the rest of the process easier. Plus, learning vocabulary is fun! This class is a great way to invest in your career in affordable housing by learning about the loan underwriting process.

AH006wt Supportive Housing as an Affordable Housing Strategy

In this webinar, you will learn what supportive housing is and how it differs from typical affordable housing, while also examining the benefits and challenges of these kinds of affordable housing developments. You’ll also explore the unique role of property management and learn about the importance of design in supportive housing projects.

AH007wt Using the American Rescue Plan for Affordable Housing

The American Rescue Plan contains allowances for “housing provisions”—but what exactly does that mean? The funds are somewhat flexible and can be used to benefit renters and homeowners alike. This class will explore the various eligible uses of the ARP funds and how they can be put to work to meet basic housing needs for the community residents. Join us as we explore the wide variety of uses, get answers to your ARP questions, and come away with a vision of how these funds can help rebuild your community.

AH009wt From NIMBY to YIMBY

The damage caused by decades of disinvestment and segregated housing markets became more evident than ever during the pandemic. For too long, some communities have had a “Not in My Back Yard” (NIMBY) mentality, and it is evidenced in zoning laws and regulations across our country. But research has shown that mixed-income developments and diverse neighborhoods provide better opportunities for lower-income individuals and families. Leveraging existing federal funds and existing partnerships may not be enough to inspire confidence that changes can be made without addressing the root cause of NIMBY mentality. This session will explore effective approaches to changing that NIMBY into a Yes in My Back Yard (YIMBY).

AH010wt Shared Equity: More than One Way to Own a Home

Homeownership – often referred to as the fulfillment of the American Dream – seems less and less accessible to working people today. The growing gap between wages and the cost of homeownership has eroded the buying power of households with modest incomes and low wealth, leaving the opportunities for wealth building and housing security to an ever-shrinking part of the population, further exacerbating this inequality. In response, local governments, community leaders and housing providers across the country are turning to alternatives to conventional homeownership – including the variety of shared equity models – to expand people’s options for ownership and to preserve affordability and access to places of opportunity. Attend this session and leave with a solid overview of shared equity models that could work in your community.
AH121wk  Real Estate Finance Nuts and Bolts
This one-week workshop introduces the key components of real estate financing. Learn basic real estate financial terms and basic principles of financing real estate. Examine the concept of loan amortization and the American mortgage lending system for rental and homeownership. 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. A basic knowledge of Excel is necessary for this class.

AH211wk  How to Maintain Compliance in LIHTC
This one-week workshop 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 discuss what happens after the credits are awarded.

MULTIFAMILY ASSET MANAGEMENT

AM002wt  Other People’s Money: Calculating Mortgage Debt for Multifamily Properties
This session will teach participants how to size debt for a multifamily property. Lenders use two measures to assess how much a property can borrow: loan-to-value ratio and supportable debt based on the property’s ability to pay (NOI/target debt service coverage ratio). In the course of the webinar, participants will learn how to use Excel to calculate supportable debt with each of these methods and will come to understand what these two measures mean and how underwriters use them.

All participants will be provided with an Excel spreadsheet, which will include two sets of exercises: the first on calculating maximum debt using the loan-to-value ratio, and the second on calculating maximum supportable debt using the NOI/DSCR method. The spreadsheet will include answers to all questions, which will allow participants to check their answers and their Excel formulas, offering a chance to both practice and check their understanding of the material.

AM003wt  Deferred Maintenance and Capitalization  NEW
Real estate wears out. Disasters occur. Does your multi-year pro forma consider how to pay for everything that’s predictable as well as events that aren’t? Probably not – or not enough. In this 90-minute webinar, you will learn the key elements to incorporate into a long-range capital planning strategy that goes beyond the underwriter’s reserve requirements. You will also examine best practices associated with capital needs assessments that are integral to this planning. And you’ll evaluate the trade-offs that accompany such a plan. The webinar also provides participants an opportunity to practice not only developing a multi-year capital plan but funding it.

COMMUNITY BUILDING AND ENGAGEMENT

CB001wt  Breaking with Isolation: The Power of Neighbors
The term “community building” is used in a variety of ways and situations. In this course we focus on its most fundamental aspect: developing the solidarity among neighbors that builds community and provides the foundation for sustainable civic engagement. It is the most basic and the most critical element of community building, but by no means the simplest. Through this course you will understand the factors that keep neighbors from joining community activities. We’ll explore the safety, belonging and self-actualization needs we all have, and how community life and civic engagement can be used to meet these needs. We’ll develop strategies to break through to the uninterested and practice the skills necessary to engage them. We’ll learn how to organize the kinds of activities that are best suited for their initiation, to develop them into committed neighbors, and retain them as enthusiastic volunteers.

CB002wt  Strong Coalitions: Building on Common Interests
Building communities takes work on the part of all parties in an atmosphere of trust, cooperation and respect. Building partnerships is one of the most effective ways to bring about lasting change. Find out about community-wide collaborations that bring public and private sectors community together. Learn techniques that really work for sharing resources, managing information, developing human capital and facilitating community empowerment. Identify ways to reconcile conflict, create win-win collaborative relationships and develop comprehensive strategies for soliciting partnership opportunities in your community.
**CB003wt The Role of Women in Community Development**

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 neighbors 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.

**CB007wt Police-Community Partnerships: Building Relationships of Mutual Accountability**

We have witnessed far too many instances when the police have come in direct conflict with the communities they “serve and protect.” Race has been a prominent element of these conflicts but many point to other triggers: despair and hopelessness in poor communities, citizens not knowing their rights or not trusting the police; inappropriate police training and the pressures of the job, or outright abuse and lack of empathy. In this interactive webinar we’ll explore the issues that affect police-community relations and identify strategies to prevent and reverse these dynamics through partnerships based on mutual accountability.

Join us to explore the evolution of policing in American history and learn about its current practice. Understand how good intentions on either side can lead to disaster and discover tools to prevent and resolve conflict. Develop strategies to educate community members about their rights and to prepare the police to work alongside the community. Learn to address head-on the most challenging issues, like race and class in police-community relations, in ways that result in strong, collaborative relationships that do not skirt accountability.
CB277vc The Building Leaders, Building Communities Experience: Facilitator Training
How would you feel if your next resident education program demanded a waitlist? How would you respond if your co-facilitator was a current resident? How would you show up if you knew resident participants would be recognized as meaningful changemakers?

CB277 invites you to innovate and reconsider your resident education programming. It also includes access to the Building Leaders, Building Communities Experience (BLBC) curriculum—NeighborWorks America’s premier resident leadership group education program. BLBC will help you redefine resident education in your community or begin defining it if you’re new to resident education. This three-day course dives into everything you need to consider, innovate, challenge, re-define, create, and launch an incredible and relevant resident education program. We’ll explore relevant and effective) recruitment strategies, REDI (race, equity, diversity, and inclusion), practice activities, budgeting tools, organizational messaging, evaluation tools, and customizable templates.

Both the BLBC curriculum and the CB277 training course are fully redesigned for 2022. If you attended CB277 before, we invite you to join us for the full curriculum revamp.

COMMUNITY ECONOMIC DEVELOPMENT

ED210vc Positioning Programs for Success: Connecting Program Design to Community Economic Impact
Do you feel challenged to clearly and graphically convey what your programs are all about to your board, staff and funders? Can you demonstrate the connection between your organization’s investments and its long-term economic impact in the community? This course uses the Logic Model framework to help you plan with the end in mind. You’ll improve your ability to design, market, monitor and evaluate your organization’s programs using long-term, measurable outcomes. This versatile and essential tool for designing community development programs will help you to identify needed resources, actions, achievable outcomes and community impact. In this interactive course you will study the difference between inputs, activities, outputs, outcomes and impact, and practice your hand at designing Logic Models through interactive class exercises.

COMMUNITY AND NEIGHBORHOOD REVITALIZATION

NR005wt The Essential Tools of Successful Neighborhood Revitalization: Measuring Results
A strong community revitalization effort requires not only effective and efficient planning and implementation, but also a focus on evaluating results and iterating improvement. In this 90-minute faculty-led webinar participants will focus on creating measurable objectives as part of the neighborhood plan and methods to evaluate the results. We’ll also spend time on how to communicate results as part of an important feedback loop to stakeholders and funders.

NR007wt Engaging Stakeholders in Revitalization Planning: Effective Participatory Techniques
In this webinar, we will investigate a variety of successful approaches and techniques for achieving participation goals and objectives, both in-person and online. Effective and fun participation processes can also develop participant leadership skills and help your stakeholders become better equipped to continue advancing their community’s interests. We will explore options from a large World Cafe, storytelling, and place-based exercises to intimate porch talks, dialogue circles, and interviews – and everything in between. You will walk away with hands-on experience with new engagement tactics, and an understanding of when they may be most appropriate to enhance your revitalization planning process.

NR009wt Comprehensive Community Development: Why It Matters NEW
Are you seeking to better align your organization’s programs and services to meet critical trends, needs or opportunities facing your community? Comprehensive Community Development (CCD) is a multi-pronged, holistic approach that focuses on places in order to strengthen community resilience and elevate local assets. Explore the fundamental strategies and benefits supporting CCD work...

- Equity and intentionality in approach
- Layered strategies
- Community driven
- Guiding vision and plan including place-based outcomes
- Strategic partnerships
- Coordinated leadership
- Layered investment

...and learn how to apply comprehensive community development principles in your work.
COURSE DESCRIPTIONS

NR010wt Revitalizing Communities through Clean Energy and Climate Resilience [NEW]
Community revitalizers cannot ignore the impacts of a changing climate on our communities, evident in increased expenses, the efforts associated with disaster preparation and recovery, and a number of critical risks. But there are also opportunities to mitigate or adapt to this change, and often save money in the process. A comprehensive green community revitalization strategy may include:

- Mitigation: reducing or limiting our communities’ contributions to climate change
- Adaptation: helping our communities respond proactively to climate risks, particularly for low-income communities and communities of color most impacted
- Sustainable development: ensuring our efforts support rather than threaten communities

This 90-minute webinar will explore how community revitalization organizations can respond to challenging and changing conditions. Participants will consider the opportunities related to tax credits for clean energy and electrification; adaptation and weatherization; organizational and business continuity planning; insurance and financial resilience; and funding sources.

FINANCIAL CAPABILITY, HOMEOWNERSHIP COUNSELING AND EDUCATION

H0001wt Foreclosure Tune-Up
It’s been a year or more since you successfully completed HO109 Foreclosure Basics, and much has changed. We know how important it is for you to have convenient access to timely foreclosure information you can rely on. You’ll have an opportunity to brush up on key concepts from the original course and apply the latest foreclosure protocols and processes to your work. Led by one of our top-notch instructors, Foreclosure Tune-Up will help you and your clients better navigate the current landscape for homeowners in crisis.

H0002wt Housing Affordability: Building Competency in Housing Counseling [UPDATED]
This course will allow counselors to refresh their knowledge and skills in helping clients assess homeownership and rental affordability options. Skills covered include practical ways to calculate income, determine different types of debt and review credit history.

H0003wt Fair Housing: Building Competency in Housing Counseling [UPDATED]
This course will allow counselors to refresh their knowledge and skills in explaining how the federal Fair Housing Act affects renting, lending, appraising and selling of residential homes and which transactions are exempt. By taking this course, counselors will be better able to identify acts of discrimination in housing and assist clients to file complaints and receive protections mandated by law.

H0004wt Financial Management: Building Competency in Housing Counseling [UPDATED]
This course will allow counselors to refresh their knowledge and skills in teaching clients budgeting skills, savings needs, and credit usage. Counselors will be able to effectively communicate actionable suggestions on implementing sound financial behaviors.

H0005wt Tenancy: Building Competency in Housing Counseling [UPDATED]
This course will allow counselors to refresh their knowledge and skills in assisting their clients in understanding lease agreements, tenant and landlord maintenance responsibilities, renters insurance, and steps to resolve disputes between landlords and tenants.

HUD CERTIFICATION SERIES
Are you ready for the HUD counselor certification exam? All housing counselors at HUD-approved counseling agencies must obtain the Housing Counselor certification for continued HUD funding! Take the entire series of webinars to boost your chance for success! And each gives you 1.5 continuing education hours.

REGISTER NOW!
VIRTUAL TRAINING INSTITUTE • FEBRUARY 6–10, 2023

COURSE DESCRIPTIONS

H0006wt Avoiding Foreclosure: Building Competency in Housing Counseling
This course will allow counselors to refresh their knowledge and skills in delinquency/eviction avoidance topics such as workflow processes, foreclosure law, and mitigation options.

H0007wt Homeownership: Building Competency in Housing Counseling
This course will allow counselors to refresh their knowledge and skills in changes impacting the housing and rental markets; working with realtors, inspectors and appraisers; and the range of available mortgage products.

H0008wt Tips, Tools and Techniques for Taking the HUD Exam
This faculty-led webinar will give you great test-taking strategies and practice to increase your confidence and give you the skills to break down questions in all six competency areas. After you register and log in, you will find the assessment coursework document under the resources (book icon) in the course. Be sure to complete the 25-question assessment before the webinar. We’ll review each question and provide the answers during the webinar so you can get a good sense of how ready you are.

H0009wt Counseling Solutions for Vulnerable Populations and Homelessness in Times of Crisis
The COVID-19 crisis has caused an uptick in families who need housing counseling assistance. Those at a higher risk include households with minimal to no savings, limited English proficiency, older populations and many more. The same vulnerable populations are at high risk of becoming homeless. However, with proper tools, which you’ll gain in this session, housing counseling agencies can help minimize the risk and impact of current financial circumstances on these vulnerable populations. In this 90-minute webinar, you will define what constitutes a population that is susceptible to becoming homeless. You’ll then identify challenges and explore services and protections available during and after the COVID-19 crisis, as well as analyze processes for effectively delivering high levels of service when counseling vulnerable populations. This includes how to establish partnerships with community agencies and navigate the proper workflow of referring clients that are identified as vulnerable or at risk.

H0035wt An Introduction to CounselorMax™ for New End-Users
This faculty-led webinar training provides you with an introduction to CounselorMax. You will learn the basics of navigating the system as well as workflow process and procedures using industry best practices for client management systems. You will also learn about the reporting capabilities within CounselorMax, which include the HUD 9902.

H0037wt Helping Clients Understand New Manufactured Homes
When renters and prospective buyers consider where to live, the decision is usually dominated by apartments for renters and single-family detached homes for buyers. Manufactured homes, a leader of factory-built construction, are often overlooked. Yet manufactured homes can represent a more efficient, precise, and affordable option for many people, especially in rural areas. Educators and counselors will examine how to provide clients with a new understanding of broader options to satisfy housing needs, and how best to outline the benefits. This primer course is best for either new staff unfamiliar with factory-built housing, or experienced staff that are looking to enhance their program offerings and knowledge of affordable housing options. By the end of this course, learners will expand their recognition of housing types, comprehend new concepts and terminology, identify financing methods, and learn about preferred home elements. Community development professionals will be armed with knowledge and resources to dispel common myths about manufactured housing.

H0038wt Government Loan Basics for Housing Counselors
As clients approach the mortgage-ready stage of the pre-purchase process, housing counselors should be able to discuss financing options, including various government loans. While most counselors include FHA mortgage products in the conversation, they should have an understanding of all government loans to help weigh options that most benefit the clients’ financial goals. In this course, participants will explore the benefits of securing an FHA loan product, review eligibility criteria for VA and Rural Housing Service special loan programs and learn how to examine government vs. conventional products with clients. In addition, tips and techniques will be shared regarding how to increase your mortgage-ready pipeline of clients with the help of government financing.

REGISTER NOW!
H0041wt Using an Equity Lens in Financial Coaching Approaches
Financial coaching is a proven way to improve financial outcomes for individuals by supporting them on the path toward financial goals and financial health. Unfortunately, these pathways are not always equitable and sometimes there are structural barriers that impede individual opportunity. How can your approach to financial coaching be more inclusive? How can you adapt it to be more compelling, relevant, and culturally responsive to communities who have been historically shut out of financial opportunity? This course will help you use an intersectional equity lens in your coaching work that accounts for people’s multiple identities (e.g., race, ethnicity, gender, geography) to help clients safely navigate current systems and move toward financial well-being. You will gain skills in seeing how identity shapes access and opportunity, acknowledging systemic harms, building trust, engaging in self-reflection, and gathering data to increase equitable outcomes.

H0042wt Owner-Occupied Rental Property and Affirmatively Furthering Fair Housing
Do you want to help potential owner-occupied buyers looking for down-payment assistance for purchasing rental property that they plan to live in, and are not sure where to start? Do you want to provide potential owner-occupied buyers of rental properties with varying incomes tips on partnership opportunities that may exist? Do you want to identify strategies that may work for owner-occupied buyers of rental properties that want to focus on diverse neighborhoods? This is a 90-minute faculty-led webinar that explores opportunities to successfully navigate being an owner-occupied landlord of a multi-unit property and the responsibilities that come with it. The session will focus on buyers becoming successful homeowners of rental properties that they will live in with an emphasis on fair housing, economic development, building credit for homeownership and committing to investing in themselves and their community!

H0043wt Trauma-Informed and Equity-Focused Approaches to Service Delivery
This course provides a foundational framework for delivering financial capability services to a broad array of clients. You will learn the skills of trauma-informed services to maintain the safety and well-being of clients. At the same time, you will understand the practices of equitable service delivery to ensure inclusiveness. You also will identify self-care strategies that support your interpersonal work with all your clients.

H0045wt Navigating Credit Concerns Amidst an Eviction/Foreclosure
Homeowners and renters alike are finding themselves wondering what happens as they move toward eviction from their homes. Will they ever be able to rent again, or purchase a home again? As a counselor, how can you help? When an eviction or foreclosure is inevitable, providing timely and accurate steps to navigate through the credit implications, while giving hope of moving beyond the crisis, is a valuable skill. This is a 90-minute faculty-led webinar will provide you with ideas and reinforce the tools and skills you need to help clients transition gracefully and equip them for the journey to restore and rebuild.

H0046wt How to Talk to Your Clients About... Medical Debt
Medical debt is the leading cause of bankruptcy in the United States, and the associated legal complications can inhibit your clients from achieving full financial security. Knowing what to do to resolve this debt, as well as knowing where to go when more specialized assistance is needed, will help your clients build and maintain their financial security. In this 90-minute webinar, you’ll learn about the macro causes and effects of medical debt in the United States, how the health care system plays a role, and how to handle medical debt once it is incurred. The webinar will cover both topical knowledge as well as actionable steps that you can take when working with your clients.

H0047wt How to Talk to Your Clients About... Saving for College
In previous generations, aspiring college students could apply to their local state college or university and attend while paying their tuition through part-time or summer work. Through the disinvestment of public universities, the financial burden has shifted to aspiring degree-holders and caused most harm to low-income/low-wealth students, particularly those of color. This webinar aims to explain the macro causes for the rise in college costs and to give learners strategies to use with clients who hope to send their children (or themselves) to college. You’ll learn about what caused this stark increase in the cost of higher education, how families are saving for college today, and what to look for in financial aid to help defray tuition costs. This 90-minute webinar will cover both topical knowledge as well as actionable steps that you can take when working with your clients.
COURSE DESCRIPTIONS

Understanding homeowner and lender rights and obligations found in loan documents

Calculating delinquencies

The ability to interact with your peers and expert faculty to explore your organization’s unique situation

A variety of online tools to enhance your learning and facilitate your coursework

WHO

Courses designated with WT are webinar training courses.

Courses designated with VC are faculty-led courses.

Courses designated with WK are one-week workshops.

They provide:

- In-depth exploration and education on an important topic
- Course content spread over 3-4 weeks according to your schedule, along with a weekly live session
- The ability to interact with your peers and expert faculty to explore your organization’s unique situation
- A variety of online tools to enhance your learning and facilitate your coursework

H0051wt Foreclosure: Changes, Trends, and Updates to Help Consumers

This interactive webinar will provide updates on the ever-changing landscape of foreclosures. Many homeowners are facing new threats of losing their homes due to more than just loss of income. Changing values, access to provisional assistance, and other threats are looming. How can you help? This webinar will provide an overview of the current state and changes to intervention processes, resources, updated tools – with insight into the federally regulated Mortgage Rescue Program and how you can access it in your own state. This webinar will give you the answers you need about the changing dynamics of foreclosures and how your clients can this unfortunate situation.

H0048wt How to Talk to Your Clients About... Asset Protection

Many low-income/low-wealth households don’t consider pursuing asset protection because they don’t feel they own anything of any worth – and therefore don’t need protection. But as financial capability professionals know, asset protection encompasses more than insurance, and clients need to know they have things of value to protect, for both themselves as well as their heirs. In this course you will learn about the various components of asset protection, namely safe banking, identity protection, insurance, and the basics of estate planning. The 90-minute webinar will cover both topical knowledge as well as actionable steps that you can take when working with your clients.

H0109vc Foreclosure Basics for Homeownership Counselors

This 4-week faculty-led online course 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.

- Default and delinquency will be addressed, 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

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

H0110vc Introduction to Housing Counseling

Participants will 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 counselors. They will learn the principles of effective counseling, essential elements of pre- and post-purchase counseling for homeowners, and delinquency and default counseling. They will be introduced to common client issues and effective intervention strategies, and will gain 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. This 4-week faculty-led online course is for individuals typically new to the housing industry.

H0209vc Delivering Effective Financial Capability Programs

Seeking financial security, today’s consumer is searching for real-time information on how to maneuver through the maze of financial products and services, establish or rebuild credit, reduce debt and save for the future. Helping clients reach their potential through a variety of services has never been more essential. This course addresses the fundamental components to successfully delivering a well-designed financial education program, starting with group education and the primary ways consumers behave with their money: visioning, maximizing income, spending, saving, borrowing and protecting. Participants will explore growing industry trends surrounding comprehensive financial capability programs, lifestyle changes, counseling, coaching and measuring outcomes. Educators and nonprofit leadership will learn exciting up-to-date practices in implementing an effective and sustainable program that best meets the needs of diverse audiences. Innovative strategies using a variety of delivery methods, including social media, will be explored, along with available resources.
COURSE DESCRIPTIONS

HO214vc: Design, Deliver and Market Your Financial Capability Program Virtually NEW

With the flexibility and convenience that the online world provides, more and more consumers are turning to virtual service options. To meet client demand, it is important that nonprofits keep up with trends and look for ways to transition their financial capability education and coaching services online.

This four-week virtual course will teach learners how to replicate their in-person financial capability services and transition to provide them online. Learners will identify how to design both counseling sessions and online classes using the right virtual platform, how to effectively engage and teach content, and how to strategically utilize free marketing tools to attract clients and increase participation in programming.

Through live webinar sessions, online discussion boards and activities, learners will acquire skills and tools that will help them easily design, deliver and market their virtual financial capability program.

HO229vc Homebuyer Education Methods: Training the Trainer

This pre-purchase homeownership education course is designed to teach participants how to design and deliver impactful homebuyer education in a variety of settings. 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 on best practices in adult education methodology.

Participants should be familiar with mortgage industry terminology and processes prior to taking this class. This course certifies you in homebuyer education delivery, and a post-course exam is required for all participants.

HO250vc Homeownership Counseling Certification: Principles, Practices and Techniques, Part I

This course is for pre-purchase homeownership counselors with a minimum of one year one-on-one counseling delivery experience. Through hands-on applications, this intermediate-level course teaches counselors the skills, procedures and subject matter expertise needed to create successful new homeowners. Participants will learn how to provide one-on-one counseling sessions to address savings, credit and debt barriers to homeownership, and use the latest industry tools, techniques and resources. Additionally, participants will practice mortgage readiness assessment, prequalification, standardized income calculations, credit report review, action plan development, and other key counseling activities. This course includes requirements for file management, code of conduct, and operations guidelines for both HUD and the National Industry Standards for Homeownership Education and Counseling.

HO274vc Rental Housing Counseling Certification: Part 1

This 4-week 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 4-week course also creates highly interactive 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 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 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 HO208 (in person, or HO208el self-guided online) and passing the exam(s).
**HO310vc 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 faculty-led online course, participants will gain an understanding of how to incorporate coaching techniques into their financial capability programs by using practical experience and demonstration activities to learn coaching essentials, including facilitation and listening skills as well as goal setting and accountability methods. Participants will learn how coaching differs from and complements counseling, financial education and other services aimed at building consumers’ financial security.

**HO345rqvc Foreclosure Intervention and Default Counseling Certification, Part I**

Designed for counselors with experience providing one-on-one foreclosure intervention and default counseling, this 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 examine case studies which 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 1 of the certification – within 30 days of completing this course the participants must take an exam and achieve a minimum score of 80%. Part II of the foreclosure counselor certification requires the successful completion of HO109vc/el.

**NA001wt Financial Education and Coaching in Native Communities**

Financial education and coaching are proven methods to help Native clients achieve financial well-being. To be successful in this effort, practitioners must understand the cultural and historical context of the Native communities and the people they serve, as well as how financial structures may differ. This course will focus on these key components, helping coaches and counselors to communicate the benefits their financial capability programs. Gain insight into the differences between the best practices of group financial education versus one-on-one coaching.

**ML016wt Equal Access: LGBTQ+ Inclusion in Housing and Community Development Programs**

The call for equity has never been louder. Yet, we are far from the aspirational goal of equal access to essential resources and opportunities for people who are lesbian, gay, bisexual, transgender, and have other gender and sexual identities (LGBTQ+). That reality is amplified for LGBTQ+ people with intersecting identities that have been historically blocked from financial opportunities—such as youth, seniors, and Black, Indigenous, Latinx, and Asian people. In general, LGBTQ+ people experience relatively high rates of housing and financial insecurity over their lives due to inconsistent legal protections, discrimination, and other systemic barriers. Inclusive housing and community development programs are vital for the LGBTQ+ community’s well-being and long-term financial security. To meet the needs of the community, programs need to adapt their approaches in ways that are culturally responsive and relevant. In this 90-minute interactive webinar, you will gain valuable skills and resources, laying the groundwork for being more inclusive of the LGBTQ+ community. Find out what the nuanced needs of the community are. Become more culturally aware. Learn how to provide general and tailored programs and solutions, all while heeding the call for equity.
ML017wt  Gaining a Competitive Edge with Reporting and Analytics

Accuracy, efficiency, and visibility are increasingly important today — not only to keep your organization running, but to excel. When you automate manual functions and better access, analyze and share data, you are better equipped to make decisions while complying with legal and other requirements. This session will provide you with the questions and answers to help you determine your next steps in advancing your reporting and analytics. Particular topics include:

- ways software can capture, manipulate, and help interpret performance data
- how to begin to, or further, automate your back office functions
- tools and methods to leverage data to inform and enhance your strategic position
- how to use information to better adapt to emerging issues and expectations.

ML018wt  Unpacking and Addressing Privilege in the Workplace

Privilege represents an unearned advantage that is granted because of one or more classifications or other characteristics. For instance, race-based privilege is separate from, but can intersect with, class privilege, gender privilege, sexuality privilege, age privilege, able-bodied privilege, or other types of privileges. In this session, participants will explore the concept of privilege, how it shapes organizational cultures that are oppressive to people with marginalized identities, and ways to proactively identify opportunities to level the playing field for ourselves and others—all with the goal of improving our workplace and our performance.

ML019wt  Creating a Good Experience with Your Brand Online and Beyond

These days, an organization’s website, email, social media, SMS, and other digital tools may be the only places people visit to learn more, sign up, watch videos, take action, donate, etc. If that’s all someone ever sees or reads about your organization, does the experience leave them with the right impression and lead them to do more? In this practical session, you’ll have the opportunity to rethink your approach to branding — seeing it as an ongoing practice of aligning around your organization’s identity and voice internally, then using it to create experiences that shape perceptions and behaviors that advance your mission and spark collective change.

ML020wt  Top Staff Retention Strategies in The Great Resignation

More and more, employees are reassessing their jobs and concluding it’s time for something different. This puts increased pressure on organizations in the community development field, many of which struggled with staff retention prior to The Great Resignation. In this session participants will dive into why people are leaving their jobs (hint: There’s a lot more to job satisfaction than salary alone!). You will also explore critical changes in employees’ expectations in recent years. Most importantly, you’ll learn concrete strategies your organization must implement to attract and retain quality staff to position the organization for success moving forward.

ML145vc  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. We welcome both veteran project staff who are looking to innovate the way they do things and professionals who are newer to collaborative processes.

ML170vc  Laying the Foundation for Fundraising

Learn the three-stage model of resource development that demystifies the process of fundraising for organizational sustainability: preparation and planning, cultivation and asking, and sustaining and thriving. This practical course covers key resource development concepts for organizations creating and supporting vibrant communities and social change. It is designed for those responsible for identifying and capturing resources to bring to their community development organizations. Join us and explore how to develop a "culture of philanthropy" that engages all stakeholders in supporting your resource development efforts.
COURSE DESCRIPTIONS

ML245vc Leadership Development in Communities of Color
Developing leadership within communities of color is a necessity in the field of community development. However, when looking at communities of color, we should also include an understanding of cultural factors and values, and their impact on the leadership development process. Managers as well as organizational and community leaders need to be aware of the unique assets communities of color bring, while also understanding many of the historical challenges faced in the leadership development process. This deeply researched and highly interactive course explores cultural dynamics to consider when creating leadership programs. It also provides strategies for creating dynamic leadership in organizations and communities.

NATIVE AMERICAN COMMUNITY DEVELOPMENT

NA001wt Financial Education and Coaching in Native Communities
Financial education and coaching are proven methods to help Native clients achieve financial well-being. To be successful in this effort, practitioners must understand the cultural and historical context of the Native communities and the people they serve, as well as how financial structures may differ. This course will focus on these key components, helping coaches and counselors to communicate the benefits their financial capability programs. Gain insight into the differences between the best practices of group financial education versus one-on-one coaching.

RURAL COMMUNITY DEVELOPMENT

RD001wt Building Rural Leaders of Color in Housing and Community Development: The Basics
The dominant narratives about rural America frequently neglect the experiences of people of color. When rural housing and economic challenges are discussed the communities and leaders portrayed tend to lack diversity. While rural America is proportionately less diverse than the country as a whole, these communities are still home to many people of color.
This 90-minute webinar training course will examine best practices in building rural leaders of color in housing and community development spaces. We will explore current trends that make intentional investment in rural leaders of color critical. As the national conversation on structural racial inequity continues to unfold, community development organizations and their partners must play a key role in championing racial equity in leadership. Given the aging and retirement trends in community development work, there’s an urgent need for clear advancement paths for leaders of color in rural revitalization efforts. Join us as we share in-real-life examples, information and tools to ensure rural people of color have opportunities and skills needed to provide leadership and thrive in community development.

SMALL BUSINESS AND SINGLE-FAMILY LENDING

LE001wt Selecting and Maximizing Your Mortgage Loan Origination Software
A Loan Origination System (LOS) can speed up your borrower's mortgage application process while helping ensure you stay compliant with lending industry requirements. Today’s LOS platforms offer enhanced benefits and even greater efficiencies than in years past. Sending electronic disclosures, e-signing documents and collecting borrower information electronically has never been easier. Extensive customization features allow for a wide range of unique data collection, document prep and reporting options.
Join us for a 90-minute webinar as we explore the three primary systems used by community-based lenders – BytePro, Encompass and Point. If you’re new to the LOS marketplace, we’ll share tips and tricks on what to look for in any system. If you’re already using one of these platforms, we’ll let you know how to get the most out of the system you already have. Finally, we’ll touch on some of the new players on the horizon that may be future industry disruptors.

LE002wt So You Want to Be a CDFI?
In this 90-minute webinar you will learn about the key strategic questions your organization should be asking if you are considering becoming a community development financial institution. The webinar will cover key components of adding lending to your business model and how to assess your organization’s readiness in each area. This includes assessing your mission and market, considering appropriate products and services, determining your internal capacity to start and grow a lending program, evaluating your legal structure, and identifying key partnerships necessary to support a successful community development lender.
**ADVANCING EQUITY FOR PEOPLE OF COLOR**

Local Solutions for Housing Stability

The COVID-19 pandemic has disproportionately impacted low-income renters and renters of color over the past three years. In December 2020, 11 million households were significantly behind on their rental or mortgage payments, putting their housing stability at risk. By July 2021, nearly a quarter of Black renters and 19% of Hispanic renters were behind on rent.

In many communities, local nonprofit organizations responded quickly to the needs of their communities. In fiscal year 2021, NeighborWorks network organizations deployed $271.6 million in resources to maintain housing stability, the majority as rental assistance. A recent analysis by the University of Pennsylvania’s Housing Initiative at Penn and the National Low Income Housing Coalition found that four out of five emergency rental assistance programs surveyed were working with nonprofits in some way. Indeed, choosing trusted community partners who truly understand their community is critically important to help reach vulnerable populations.

But what about your community? How effective has the response been in your area? How are partnerships working to help residents through this challenging time? And more importantly, are there strategies and approaches that can bolster your work in this area?

Join us for a solutions-focused symposium and learn how nonprofit organizations have been successful in helping to stabilize renters and homeowners in their communities. Highlighting examples from around the country, we’ll explore the importance of local partnerships to strengthen capacity and assist in outreach and service delivery, the role housing counselors play in helping people facing housing instability navigate complex systems, and ways to reach those most impacted—particularly low-income people and people of color—through trusting relationships, language, and cultural competency.

Throughout the event, we’ll consider:
- How tailoring solutions to the local community advances equity for people of color.
- How centering resident voices improves outcomes and promotes equity.
- How we can best ensure data is inclusive of all voices and informs solutions.

**ADVANCING EQUITY FOR PEOPLE OF COLOR**

This symposium is the first of three in a series that explores ways in which our work advances racial equity. In May and August at the NeighborWorks Training Institutes, we will focus on security/wealth-building and climate/environmental issues as they relate to advancing equity.

This timely and practical symposium is designed for:
- Local community development and affordable housing nonprofits
- Local and county government
- State housing finance agencies
- Housing counseling intermediaries
- Funders

Round out your week of learning with the following sessions:
- H0045wt Navigating Credit Concerns Amidst an Eviction/Foreclosure
- H0046wt How to Talk to Your Clients About … Medical Debt
- H0274vc Rental Housing Counseling Certification: Part 1
- H0038wt Government Loan Basics for Housing Counselors
- H0209vc Delivering Effective Financial Capability Programs
- CB002wt Strong Coalitions: Building on Common Interests
- HO310vc Financial Coaching Helping Clients Reach Their Goals
- HO345rqvc Foreclosure Intervention and Default Counseling Certification: Part I
- H0051wt Foreclosure: Changes, Trends and Updates to Help Consumers

Related reading:
- What Have We Learned About Emergency Rental Assistance?
- Building Local Institutional Capacity: Lessons Learned from the Emergency Rental Assistance Program
- Housing Counseling to Support Renters in Crisis

**SYMPOSIUM: SY900 • WEDNESDAY FEB 8 • 12:30 P.M. – 4:00 P.M. EST**

Streaming Start Times: 9:30 a.m. EDT • 8:30 a.m. CDT • 7:30 a.m. MDT • 6:30 a.m. PDT • 5:30 a.m. AKDT • 4:30 a.m. HADT
Our goal is to give you a comprehensive training experience that includes career enhancement, personal development and peer learning. To offer something for every kind of learner at every career stage, we’ve developed “extracurricular” offerings that augment your course session experience and bring your expert-led learning to life.

Check out these sessions and add the interesting ones to your schedule. They’re free with your course registration, and we encourage you to participate with your fellow learners. A great way to learn something new and build professional connections!

### MONDAY 2/6

**ROUNDTABLE: Using the American Rescue Plan Act (ARPA) to Address Housing**

The American Rescue Plan Act (ARPA) presents an unprecedented opportunity to provide capital funding to address our critical need for housing and affordable homeownership across the country. Hear from practitioners who have successfully accessed ARPA for this purpose. Share your experiences and bring your questions for a robust discussion.

**HOT TOPIC: As the Consumer Goes, So Goes the Community: Consumer Resilience and Community Empowerment**

The whole is not greater than the sum of its parts. Communities are made up of consumers. As consumer wealth goes, so goes community wealth. This session uses two real-world situations to illustrate the power of the reciprocal relationship between consumers and the communities in which they live. Financially resilient consumers can have a strong effect on the outcome of their communities. Likewise, team members in an organization in the community can use their talent and initiative to reach out and help others overcome barriers to success.

**WELLNESS AT WORK: Gentle Yoga for Stress Relief**

This class moves you through a series of poses that connect breath to movement. Join Angelique from Yoga Heights in DC for a 45-minute gentle yoga class that will help you to relieve tension and stress in your body, mind and spirit. No experience is required. Students can expect an emphasis on breathing as you progress through a flowing sequence of poses to help you get out of your head and into your body.

**HOT TOPIC: Important Updates from HUD**

Join Jerry Mayer of the HUD Office of Housing Counseling to get critical updates on programs and services in the world of housing counseling, foreclosure and eviction intervention, disaster response and recovery, and policy changes.

**GAME-ON NETWORKING: Virtual Escape Room**

Mystery abounds at Bobby Majestic’s Amazing Tigerland. Money is missing, and everyone knows something about who took it. Can you find the culprit amongst this group of outcasts? Documentary filmmaker Steve Brinkman has film that shows who is the thief – but he’s encrypted all of the video clips. Players work together to unlock the encrypted video to discover this offender. Tigerland is an escape style game designed to be played with remote teams use videoconferencing technology. Players join together and communicate virtually to solve puzzles and determine the thief. Join us to refresh your brain during a day of learning!

**ROUNDTABLE: Capitalization**

What are the most significant challenges for nonprofit organizations to become “investor- ready”? Is it attracting the investor or building capacity to meet investor demands? Explore issues and ideas related to bring more capital into your organization.
# Networking and Peer Learning

## Tuesday 2/7

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>9 – 9:45 A.M.</td>
<td><strong>Roundtable: Navigating Executive Transitions – What to Consider When Anticipating a Change in Organizational Leadership</strong>&lt;br&gt;Are you an executive planning to move on? Are you a staff person or board member in an organization that will be experiencing a change in organizational leadership? Leadership transitions can have tremendous impact on an organization. Come to learn and share tips and ideas about how to manage transitions before, during, and after.</td>
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<tr>
<td>10 – 10:45 A.M.</td>
<td><strong>Wellness at Work: Chair Yoga for Wellness Anywhere, Anytime</strong>&lt;br&gt;Join Angelique from Yoga Heights in DC for a 45-minute chair yoga class that will teach you how to move, breath and relax even when you can’t get away from your desk. No experience required. This class moves you through a series of poses that connect breath to movement. Students can expect an emphasis on breathing as you progress through a flowing sequence of poses to help you get out of your head and into your body.</td>
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<td>12 – 12:45 P.M.</td>
<td><strong>Game-On Networking: Virtual Bingo</strong>&lt;br&gt;Time for a classic and iconic game of Bingo. Virtual Bingo welcomes everyone for all skill levels and ages to participate in a few rounds of fun. Winners will have bragging rights for the week and a chance to interact with other participants!</td>
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<tr>
<td>2 – 2:45 P.M.</td>
<td><strong>Hot Topic: Brand Me! Building Your Brand</strong>&lt;br&gt;Are you walking YOUR walk and talking YOUR talk? Your personal brand is the best representation of you. It needs to be clear, consistent and authentic. This workshop will help you define your personal brand and the best way to communicate it, on and offline. This workshop will cover the art of crafting your message, developing a mini-marketing strategy, social media approach, creating online engagement, and being true to YOU.</td>
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<td>3:15 – 4 P.M.</td>
<td><strong>Roundtable For NeighborWorks Only: Introduction to the Sustainable Business Initiative (SBI)</strong>&lt;br&gt;Join us to learn how the Sustainable Business Initiative (SBI) can empower your organization to move from a social service model to a social enterprise. We strive to help our organizations meet this goal by providing access to learning, tools, technical assistance from subject matter experts and peer support. As social enterprises, network organizations will move toward a new business model by embedding a culture that allows them to be agile and open to change while improving their double bottom line: delivering on their mission and becoming more sustainable through earned revenue. Join this session to learn more about how the NeighborWorks network is leading the charge on increasing efficiencies, becoming more sustainable, scaling services and ultimately having a greater impact in the communities they serve.</td>
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<tr>
<td>3:15 – 4 P.M.</td>
<td><strong>Roundtable: Housing Stability Counseling Program</strong>&lt;br&gt;This roundtable will provide an update on the Housing Stability Counseling Program. During the session, we will share the trends we have seen during the program, successes, challenges, and how NeighborWorks is also supporting the grantees during the administration of the grant. Come find out how your organization can have a greater impact.</td>
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<td>4:30 – 6 P.M.</td>
<td><strong>Afternoon Workshop: Lending Strategy: Leveraging Peer Networking in Nonprofit Lending</strong>&lt;br&gt;This afternoon session will be a facilitated conversation guiding peer networking among nonprofit lenders to discuss and answer questions at critical decision points in developing a lending strategy. Based on participant interest, topics could include staffing/organizational structure, market analysis, product mix, and outreach to target markets.</td>
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NETWORKING AND PEER LEARNING

TUESDAY 2/7

AFTERNOON WORKSHOP: Using Your Charity Navigator Rating to Boost Fundraising
Charity Navigator is the world’s largest and most utilized independent nonprofit evaluator. Through our ratings, nonprofits are equipped with the nonprofit sector’s premier trust indicator and a powerful platform to raise awareness and funds. With close to 15 million distinct visitors a year, it is an ideal vehicle for a nonprofit to gain exposure. It is likely that all NeighborWorks member organizations are currently rated in at least in some Encompass beacons and may be eligible for rating under Impact and Results. Charity Navigator will provide you with tools and tips on the benefits of a strong Charity Navigator rating on individual fundraising, and on ways to improve and then leverage their ratings for your fundraising campaigns. This session is targeted at smaller nonprofits aiming to expand their individual donor fundraising efforts.

4:30 – 6 P.M.

AFTERNOON WORKSHOP: Bank of America $15B Community Homeownership Commitment and the Connect to Own® Fee-for-Service Homebuyer Education Program
Please join Bank of America to understand the components of their $15B Community Homeownership Commitment program and learn about their low down payment options, proprietary grant programs and the vast resources developed to help housing counselors find solutions to assist clients in overcoming the barriers to homeownership. Recent enhancements are designed to make homeownership a reality for modest income and underserved borrowers and communities.

4:30 – 6 P.M.

AFTERNOON WORKSHOP: Never Comfortable: A Focus on Professional Personal Soft Skills for Counselors
You won’t want to miss this interactive session that focuses on soft skills development for counselors who are looking to improve in the areas of communication, listening and how to work more efficiently when it comes to delivering counseling across all modalities (in person/face-to-face, online/virtually, over the phone, etc.) Come with your questions!

THURSDAY 2/9

ROUNDTABLE: Coaching Skills for Supervisors
Staff recruitment and retention is becoming more and more difficult. Studies show that one of the main reasons staff leave is due to dissatisfaction with their supervisor. Organizations are realizing that to be an effective manager, it is important to sometimes be a coach for your staff. Come learn some great coaching skills to motivate, energize, and support your team.

9 – 9:45 A.M.

HOT TOPIC: Learning, Linking and Leveraging Social Media
Understanding the basics of social media is the key to developing an effective communications plan. This workshop will help you master the skills of social media including social media management, monitoring and skillful execution. It will also cover the art of crafting your message, developing a social media strategy and content calendar, identifying your “pillars,” creating engagement, identifying the do’s and avoiding the don’ts of social media, and social media apps to make it easy and fun.

10 – 10:45 A.M.

GAME-ON NETWORKING: Virtual Paint Party
Find your inner Bob Ross by painting with 25 of your fellow participants for an instructor-led session with supplies provided by the vendor. This will be a live session over the vendor’s Zoom link. NOTE: Registration will close two weeks prior to the event date to accommodate shipping the supplies to participants. In order the send you the supplies, please provide your information by January 26, 2023. If your information is not received by the deadline we cannot guarantee you will receive the supplies.

12 – 12:45 P.M.
HOT TOPIC: How to Keep Our Credit and Divorce Our Debt
When you obtain credit, you sign a contract and your ability to fulfill its terms determines the quality of your relationship with the creditor. Successful financial relationships can lead to long-term harmony - or in some instances, when consumers seek bankruptcy protection or a creditor sues a client, a type of financial divorce occurs that can compromise future financial relationships with other lenders. Financial relationships can flourish or flounder based on the decision-making of the consumer. We will learn the principles that lead to financial harmony and how to overcome credit mistakes from the past. Credit is often necessary but excessive debt is not – so it’s important to understand how to keep and maintain credit properly while divorcing our debt.

ROUND TABLE: Time Management – How to F.O.C.U.S.
In this roundtable, we will discuss how to F.O.C.U.S. when it comes to managing your time. This is an interactive discussion, so come prepared to really get down to what is essential and non-essential in all areas of your life and learn the F.O.C.U.S method.

ROUND TABLE: African American Community Development: Virtual Tour and Discussion
As February is Black History Month, the NeighborWorks America Midwest Region team would like to take VTI participants on a virtual tour of network organizations that are doing transformative, comprehensive community development work in African American communities. Virtual video tours will be followed by a panel discussion with outstanding African American leaders who will talk about their leadership and approach to the work.

AFTERNOON WORKSHOP: Help! Our Homebuyer Education Program Needs a Makeover
Do your homeownership classes meet the needs of your community today? Are market conditions impacting your customer pipeline? Let’s talk about how to adapt traditional homeownership education to the new marketplace! In this session, Lori and Ann will focus on market trends, ever-changing technology, marketing strategies and ways to adapt our programs so they stay current, vital, and robust. By the end of this session, you’ll have ideas on how to address gaps and navigate necessary transitions, plus have some fun along the way. Together, Lori and Ann have over 50 years of community development and housing counseling experience, so join us for a solutions-based discussion on how to give your homeownership program a makeover (or just a little refresh).

AFTERNOON WORKSHOP For NeighborWorks Only: NeighborWorks Full-Cycle Homeownership Certification
Executive directors of NeighborWorks organizations, working closely with National Homeownership Programs and Lending, requested an update to the national certification process that helps define their homeownership services as unique in their communities and help maintain high-quality standards for the NeighborWorks Homeownership approach. For several years National Homeownership Programs and Lending engaged with the Homeownership Steering Committee, Homeownership Managers Advisory Committee, Field and OAD to inform these updates. This new certification replaces the previous full-cycle lending approach and is intended to better reflect the changing needs of the network and create added value for network organizations and the services they provide. In this workshop, NeighborWorks staff will provide a detailed overview of the new NeighborWorks Full-Cycle Homeownership certification – the re-branding effort, policy changes, timelines for compliance and resources to support the transition. Staff will be on hand to provide guidance and answer any questions.

AFTERNOON WORKSHOP: Symposium Solutions Lounge
Symposium registrants are invited to join us as we dive deeper on local solutions for housing stability.
**PLAN PRICING**

Based on customer demand for package pricing and discounts, we’re offering the following to maximize your value:

<table>
<thead>
<tr>
<th>PACKAGE</th>
<th>INCLUDES</th>
<th>GENERAL ADMISSION PRICE</th>
<th>NETWORK MEMBER PRICE</th>
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</thead>
<tbody>
<tr>
<td>All-Access Package*</td>
<td>Unlimited webinars, symposium, networking and your choice of one faculty-led course or one-week workshop (you can add on one additional faculty-led course or one-week workshop at the price below)</td>
<td>$1,200</td>
<td>$800</td>
</tr>
<tr>
<td>Week of Webinars</td>
<td>5 webinars and unlimited networking</td>
<td>$500</td>
<td>$300</td>
</tr>
<tr>
<td>Symposium/Networking Combo</td>
<td>All symposium sessions</td>
<td>$125</td>
<td>$125</td>
</tr>
</tbody>
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**ADD-ONS**

- Faculty-led courses*          $475  $325
- One-week Workshop*            $195  $175
- Webinar                      $99   $59
- Symposium                    $125  $125

* Add-on activities can be added to any packages.

* All-Access Package—space is limited in faculty-led courses and one week workshops, so register early!

* Due to the time commitment associated with one-week workshops and faculty-led courses, for this event registrants are limited to two (2) one-week workshops OR faculty-led courses.

**REGISTRATION**

Registration is easy! Visit our event site to register online [https://collaboration.net/nwwintervti2023](https://collaboration.net/nwwintervti2023) and follow our [visual step-by-step registration guide](https://collaboration.net/nwwintervti2023). Questions? We are here to help. Call us at 800-438-5547 or email us at trainingevents@nw.org.

**EVENT OFFERINGS AND YOUR TIME COMMITMENT:**

When exploring your registration options, consider our various course and networking session offerings, and the time commitment for each. Note that at this event, due to the focus required for one-week workshops and faculty-led courses, registrants are limited to two (2) of these types of courses. This can be two (2) one-week workshops or two (2) faculty-led courses or a combination of one of each type.

**SCHOLARSHIPS:**

Limited scholarship assistance is available to nonprofit organization staff. For more information, visit NeighborWorks.org/scholarships. Note that if you are awarded a scholarship and do not cancel or are a no-show to the virtual event, your scholarship eligibility may be revoked for 12 months.

**EVENT POLICIES:**

Recognizing that this is a challenging time for many, we’ve simplified our policies and event procedures. If you have any questions or need any guidance, please contact us at trainingevents@nw.org or 800-438-5547. Our Customer Response team is happy to help.

**PAYMENT POLICY:**

Training Institute package pricing is outlined above. Payment is due at the time of registration and may be made by Visa, MasterCard or American Express. To make a payment by check or arrange group payments, please contact our Customer Response team at trainingevents@nw.org or 800-438-5547 for assistance. All tuition and registration payments must be received in full before obtaining final instructions to access your sessions.

**RECORDED SESSION ACCESS AND WEBINAR QUIZ ACCESS:**

Recorded webinar sessions will be assigned to participants who have pre-enrolled in the live webinar prior to the session start time. We recommend that all registrants make their final webinar selections by no later than Friday, February 3. You will have until 5:00 p.m. EST Monday, February 20 to watch any of the recorded webinar sessions and/or take and pass a webinar quiz to receive full attendance credit. Both the recorded sessions and webinar quizzes will be added to your event MY COURSES | YOUR SCHEDULE page with clear labeling. Attendees have three attempts to pass the webinar quiz. The Symposium and Networking sessions will not be recorded.

**CHANGES, SUBSTITUTIONS, CANCELLATIONS, REFUNDS:**

Changes: Customers may make changes directly in the event site; however, changes after a live session has begun will not give you access to the webinar recording. To change a webinar, faculty-led course or one-week workshop selection in the site, use the exchange session function to exchange your registered activity for your preferred replacement option. By using the exchange function this will allow you to make the change without incurring an “add-on” charge. Webinars may be exchanged up until prior to the webinar start time. The exchange function for faculty-led courses and one-week workshops will be shut off on Wednesday, January 25.

For any of the networking or free activities in the site you may simply click the “UNREGISTER” button in the session description page for the session you would like to be removed from, and click the “REGISTER” button for the session you would like to add to your schedule.

Substitutions: Will not be processed for this event.

Cancellations/Refunds: Cancellation requests must be sent in writing to our Customer Response team at nti@nw.org. The last day to cancel for a refund is Thursday, February 2.

**ATTENDANCE AND CERTIFICATE POLICY:**

All sessions start and end promptly. Certificates of completion are awarded only to participants who attend and pass the quiz associated with each webinar, faculty-led course or one-week workshop prior to the event closing date. The event will remain open until Friday, February 17 to allow participants to take the quiz and print online certificates for webinars. One-week workshops and faculty-led courses have their own due date schedule for course work and quizzes that will be provided directly from the faculty at the start of the course. For Webinars, the system will also auto-send a copy of your certificate to your email account so be sure to check your junk mail folder if you don’t see it in your inbox after successful quiz completion. The Symposium and Networking sessions do not include attendance certificates.

**SHARING OF PERSONAL INFORMATION:**

NeighborWorks America is committed to protecting the personal information of its training event attendees. In order to support your participation in this Virtual Training Institute, NeighborWorks America will share your email address with outside vendors for the limited purpose of delivering services to you during VTI. These services include use of the virtual training platform and the event networking or food service vendors.

**KEY EVENT DEADLINES:**

- **Wednesday, January 25:**
  - last day to register or exchange a Faculty-led course or One-week Workshop

- **Thursday, February 2:**
  - Last day to cancel for a refund

- **Friday, February 3:**
  - Recommended last day to select webinar sessions to guarantee your access to the webinar recordings

- **Monday, February 20:**
  - Last day to access a webinar recorded session or to take a webinar quiz in the event site. Site Closes at 5 p.m. EST on this date.

For more event information visit: [NeighborWorks.org/NWWinterVTI](https://www.nw.org)

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