

NTI

NEIGHBORWORKS TRAINING INSTITUTE
AUGUST 25 – 29, 2025 • NEW ORLEANS, LA



A FULL WEEK OF PROFESSIONAL LEARNING

COMPLETE WITH:

- ▶ **More than 90 cutting-edge courses, many new or updated**
- ▶ **A myriad of networking, peer learning and personal development sessions**
- ▶ **Career-enhancing credentials**

A SPECIAL WEDNESDAY SYMPOSIUM
SY905: Building Coalitions
for Generational Wealth

WELCOME TO NEW ORLEANS

COME ON DOWN TO NEW ORLEANS! Some call it The Big Easy. Some call it The Crescent City. Some call it the northern-most Caribbean city. I hope you leave the NeighborWorks Training Institute (NTI) calling it the city that hosted the best professional development experience of your life. **With 90+ courses spanning the entire housing and community development industry**, this is our largest and most refreshed NTI ever!

Twenty years ago, this phenomenal city was decimated by Hurricane Katrina and the subsequent failure of the levee protection system. In 2025, its residents and former residents are reckoning with all that has transpired since. As you look ahead to the NTI, I challenge you to look for the connection with your own work – extreme housing rehabilitation, powerful resident engagement, dismantling the barriers to affordable homeownership, new strategies for housing finance and insurance, productive engagement with local and federal policy.

Investing in ourselves through professional learning is investing in the future of our communities. At the NTI, NeighborWorks America cordially invites you to come for the barbecue shrimp po-boys and leave with new tools and strategies to create lasting impact. Here is some of what you can expect:

- ▶ Expert-led courses, including **new courses** in community health; **updated courses** in financing and evaluating community economic development; supremely timely courses on understanding and **influencing public policy** and the **use of AI in community development work**; sessions to bolster **rural and Native community development**; courses on leadership, facilitation, and presentation skills, all designed to help you **lead change in your community**.
- ▶ A symposium on **building coalitions to address heirs' property rights** and foster generational wealth. How do we help people turn their homes into a tool for generational wealth, and how do we protect long-time residents and their families when their homes are targeted for redevelopment? Let's talk about it and find out.
- ▶ Peer learning in the form of a **Tech Showcase** with demos; **free workshops** and **other activities with participants** to build your professional network and reinvigorate your work.

In New Orleans, we will continue the NTI legacy of creating a culture of continuous improvement that reinforces what our industry is all about: **Creating homes, building America**.

I look forward to welcoming you to New Orleans and sharing the magical experiences that only happen here. Please plan to venture out into the neighborhoods to enjoy the local cuisine, live music scene and natural beauty. You might find yourself enjoying the perfect po-boy up on Bayou St John, humming a jazz standard you heard at a spot in Treme or strolling through the Bywater imagining the generations who lived there before now.

New Orleans in August will be hot, but this NTI will be hotter! (Sorry, I couldn't help myself!)



**Marietta Rodriguez, President
and Chief Executive Officer**

***“We all have something
to learn in New Orleans.
Some lessons will be in
the NTI classroom and
others will be out in the
neighborhoods.”***

Marietta Rodriguez

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THANKS TO OUR SUPPORTERS

JPMORGAN CHASE & CO.





LAISSEZ LES BON TEMPS ROULER (LET THE GOOD TIMES ROLL!)

Here's what we're doing at the NeighborWorks Training Institute in New Orleans to maximize your learning, your growth, and your fun...



We're keeping you energized!

We'll 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! New Orleans is known for great places to dine, so don't fill up on those snacks!



We're helping you connect with your colleagues

We've got fun ways to connect with your peers from around the country. New ways to foster discussions that can enhance your work, your career and your time in NOLA! Check out the free activities listed on page 25. We look forward to relaxing with you outside of class hours.



We're propelling you into the future

We're featuring a Tech Showcase that will allow you to explore the technology that can power your work, today and tomorrow. Join us on Wednesday from 7 a.m. to 5 p.m. for demos and the chance to talk to a variety of tech vendors. Have questions? These are the experts who can answer them! (Pro tip: there are snacks and prizes.)



And we have more coming...

Lunch is on us for our Meet, Greet and Eat session! Join us to eat with your colleagues and hear about what's happening at this event – as well as the new things we're planning in the coming months to make your professional learning experience even better. We'll also be adding in networking and professional and personal development activities over the coming weeks, so be on the lookout for email announcements and add these sessions to your schedule.

See You Soon in the Big Easy!

COURSES OFFERED AT THIS EVENT

		TUITION	AUG		
			MON 25 TUES 26	WED 27	THURS 28 FRI 29
AFFORDABLE HOUSING					
AH101	The Fundamentals of Affordable Housing Development	\$800			
AH113	Using the HOME Program	\$800			
AH115	Using the Low-Income Housing Tax Credit (LIHTC) Program	\$800			
AH121	Real Estate Finance Nuts and Bolts	\$400			
AH142	Designing Affordable Housing From Project Concept to Blueprint	\$800			
AH211	How to Maintain Compliance in LIHTC Projects	\$400			
AH218	If It Can Go Wrong: Resolving Predictable Crises in Real Estate Development NEW!	\$800			
AH221	Rental Housing Development Finance	\$800			
AH230	Investment Playbook for High-Performance/High-Efficiency Multifamily Buildings NEW!	\$800			
AH256	Shared Equity Housing: Creative Models to Preserve Affordable Homeownership	\$800			
ASSET MANAGEMENT					
AM121	Nuts and Bolts of Asset Management (CHAM)	\$1,200			
AM321rq	Advanced Financial Tools for Asset Managers (CHAM)	\$1,200			
AM351rqbl	Advanced Housing Asset Management (CHAM)	\$1,765			
COMMUNITY AND NEIGHBORHOOD REVITALIZATION					
NR105sv	Comprehensive Community Development in Places NEW!	\$800			
NR115	Developing High-Impact Neighborhood Revitalization Strategies UPDATED!	\$800			
NR121	Measuring for Impact: Strategies for Success UPDATED!	\$1,200			
NR160	Building Healthy Communities for Comprehensive Outcomes NEW!	\$800			
NR165sv	Foundations of Community Health Worker Models NEW!	\$1,200			
NR190	Make It Creative: Leveraging Arts and Culture for Affordable Housing and Community Development	\$800			
NR290	Make It Count: Measuring the Impact of Arts in Your Community	\$400			
NR305	Understanding Upzoning: Changing Rules, Changing Communities	\$800			
NR390	Make It Last: Integrating Arts and Analysis to Leverage Creative Community Development	\$800			
COMMUNITY ECONOMIC DEVELOPMENT					
ED101sv	Community Economic Development Principles, Practices, and Strategies	\$800			
ED110	Analytical Tools and Methods Used in Community Economic Development UPDATED!	\$400			
ED160	Financing Community Economic Development UPDATED!	\$800			
ED210	Measuring for Impact: Strategies for Success UPDATED!	\$1,200			
RD130	Rural Community Economic Development	\$800			
COMMUNITY ENGAGEMENT					
CB105	Foundations of Community Building & Engagement	\$800			
CB106	Laying the Groundwork for Effective & Sustainable Community Building	\$800			
CB200	Measuring for Impact: Strategies for Success UPDATED!	\$1,200			
CB270	Training Techniques: Designing and Facilitating Successful Training	\$800			
CB277	The Building Leaders, Building Communities Experience: Facilitator Training	\$1,200			
CB310	Understanding & Influencing Public Policy UPDATED!	\$800			
CONSTRUCTION AND REHAB					
CP101	Housing Rehabilitation Design and Construction Basics	\$800			
CP153	Basic Blueprint Reading	\$400			
CP195	The Essentials of Healthy Homes Practitioners	\$800			
CP196	Healthy Homes Assessment and Interventions	\$1,200			
FINANCIAL CAPABILITY, HOUSING EDUCATION AND COUNSELING (PRESENTED BY NCHEC)					
H0103	Lending Basics for Homeownership Counselors	\$1,200			
H0105	Compliance with State and Federal Regulations	\$800			
H0109	Foreclosure Basics for Homeownership Counselors UPDATED!	\$800			
H0111	Home Equity Conversion Mortgages UPDATED!	\$2,000			
H0200	Ready, Set, Prep: Tackling the HUD Counselor Exam Step by Step	\$1,200			
H0208a	Building Skills for Financial Confidence	\$800			
H0208b	Building Skills for Financial Confidence	\$800			
H0209	Delivering Effective Financial Capability Programs	\$800			
H0210	Practice, Study, Success: Test Strategies for HUD's Counselor Certification Exam	\$800			
H0211	Credit Counseling for Maximum Results	\$1,200			
H0213	Fair Housing - What Professionals Need to Know	\$400			
H0229	Homebuyer Education Methods: Training the Trainer UPDATED!	\$2,000			

100 Level Fundamental course		200 Level Intermediate course		300-400 Level Advanced course		AUG			
						TUITION	MON 25 TUES 26	WED 27	THURS 28 FRI 29
FINANCIAL CAPABILITY, HOUSING EDUCATION AND COUNSELING (PRESENTED BY NCHEC)									
H0234	Pathways to Sustainable Homeownership: Creating Opportunities and Building Financial Security NEW!					\$800			
H0247	Post-Purchase Education Methods UPDATED!					\$2,000			
H0248	Cracking the Code: HUD Compliance for Housing Counselors UPDATED!					\$800			
H0250	Homeownership Counseling Certification: Principles, Practices and Techniques, Part I UPDATED!					\$2,000			
H0274	Rental Housing Certification: Part 1					\$1,200			
H0288	Rental Eviction Intervention Certification: Part 1					\$1,200			
H0290	Counseling Clients to Maximize Home Energy Efficiency Savings UPDATED!					\$800			
H0307	Advanced Foreclosure: Case Study Practicum UPDATED!					\$800			
H0310	Financial Coaching: Helping Clients Reach Their Goals UPDATED!					\$800			
H0345	Foreclosure Intervention and Default Counseling Certification, Part I UPDATED!					\$2,000			
H0360	Homeownership Counseling Certification for Program Managers and Executive Directors UPDATED!					\$2,000			
H0370bl	Financial Coaching Advanced Practicum: Taking Your Practice to the Next Level UPDATED!					\$1,365			
H0375	Financial Capability Program Design for Managers					\$800			
H0380	Compliance Check-Up for HUD Housing Counseling Program Managers and Executive Directors UPDATED!					\$1,200			
H0385	Using Trauma-Informed Skills in Financial Coaching UPDATED!					\$800			
H0388	Rental Eviction Intervention Certification Part 2: Program Design and Delivery					\$800			
NA200	Mortgage Lending on Tribal Land					\$800			
NA275	The Trauma of Money in Native Communities NEW!					\$1,200			
NONPROFIT MANAGEMENT AND LEADERSHIP									
ML109	Developing Your Leadership Potential UPDATED!					\$400			
ML127	Designing and Delivering Dynamic Presentations UPDATED!					\$800			
ML150	Unlocking Your Team’s Potential With AI NEW!					\$400			
ML170	Laying the Foundation for Fundraising					\$800			
ML220	The Art and Science of Group Facilitation UPDATED!					\$800			
ML229	Emotional Intelligence (EI) at Work					\$800			
ML236	Using Tableau to Visualize Impact and Tell Your Story					\$800			
ML245	Identifying, Cultivating, and Leveraging Distinct Leadership Types UPDATED!					\$800			
ML246	Leadership in All Directions: The Unique Role of a Senior Manager					\$400			
ML251	Developing Successful Partnerships with Native Organizations					\$800			
ML274	Exploring Excellence in Governance UPDATED!					\$400			
ML276	Developing a Donor Communications Plan					\$800			
ML282	How to Negotiate: The Most Important Skill You Will Ever Learn!					\$800			
ML284	Influence Without Authority: Persuasion Skills You Never Knew You Had!					\$400			
ML287	Coaching Teams to Build Leadership UPDATED!					\$800			
ML297	Leadership Tools for Achieving Excellence					\$400			
ML312	Organizational Leadership Succession					\$800			
ML322	Streamlining Operations for Greater Sustainability					\$800			
ML396	Organizing Neighborhoods for Emergency Response					\$800			
ML397	Are You Prepared? Disaster Preparedness and Business Continuity Planning					\$400			
NATIVE AMERICAN COMMUNITY DEVELOPMENT									
ML251	Developing Successful Partnerships with Native Organizations					\$800			
NA200	Mortgage Lending on Tribal Land					\$800			
NA275	Building Native Communities: Trauma-Informed Financial Practices NEW!					\$1,200			
SINGLE-FAMILY AND SMALL BUSINESS LENDING									
LE210	USDA Section 502 Direct Loan Application Packaging: Affordable Rural Homeownership					\$750			
LE225	How to Ensure Compliance in Single-Family Lending					\$1,200			
LE241	Intermediate Underwriting for Micro and Small Business Lenders					\$800			
LE250	Community-Based Residential Lending - Outreach, Intake, and Loan Application Best Practices					\$800			
LE320	Effective Board Governance for Lending Operations UPDATED!					\$800			
NA200	Mortgage Lending on Tribal Land					\$800			
RURAL COMMUNITY DEVELOPMENT									
LE210	USDA Section 502 Direct Loan Application Packaging: Affordable Rural Homeownership					\$1,200			
RD130	Rural Community Economic Development					\$800			
SYMPOSIUM									
SY905	BUILDING COALITIONS FOR GENERATIONAL WEALTH					\$400			



NEIGHBORWORKS PROFESSIONAL CREDENTIALS

Our micro-credentials, certifications and certificate programs position you as a better candidate for future job advancement – while paying off today for your organization and the constituents you serve. Invest in your NOW and earn the credentials and future you deserve!

MICRO-CREDENTIALS

Our growing roster of micro-credential offerings presents a series of focused courses that, upon completion, demonstrate your knowledge and skill in specific content areas.

- ▶ Competitive career advantage
- ▶ Affordability
- ▶ Focused learning
- ▶ Convenience

NCHEC CERTIFICATIONS

Nine specialized certifications for housing practitioners that support the requirements of HUD and the National Industry Standards for Homeownership Education and Counseling.

- ▶ Directly applicable
- ▶ Sign of quality services
- ▶ Key to funding opportunities
- ▶ Professional growth

PROFESSIONAL CERTIFICATES

Our professional certificate offerings provide a comprehensive, in-depth educational experience.

- ▶ Comprehensive curriculum
- ▶ In-depth coursework
- ▶ Continuous education
- ▶ Peer-to-peer exchange

**Find out more about how you can better serve your community and better position yourself
in your profession! Visit NeighborWorks.org/Credentials.**



COURSE DESCRIPTIONS



For a complete list of course offerings for this institute, check out the course grid on page 5. To read full course descriptions for each content area and to register online, visit <https://collaboration.net/nolanti2025>

REGISTER NOW!

AFFORDABLE HOUSING

AH101 The Fundamentals of Affordable Housing Development

In this comprehensive overview of the real estate development process, you'll learn to evaluate the pros and cons of real estate development and how they can affect your organization's goals. We'll discuss project assessment, acquisition, finance, construction, marketing, pre-leasing, leasing and management. Using examples and on-site exercises, we'll review the roles, risks and rewards of real estate development. This course is for managers working in organizations considering real estate development. It is part of the Consortium for Housing and Asset Management curriculum for Nonprofit Housing Management Specialists (NHMS) seeking the Certified Housing Asset Manager designation. For more information, visit www.chamonline.org.

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 for 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 efforts.

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. The course is ideal 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 real estate financial terms and basic principles of financing real estate. Together, we'll examine the concept of loan amortization and the American mortgage lending system for rental and home ownership. You'll learn to use spreadsheets to make basic financial calculations of loan payments, interest rates, present and future values of investments/loans and the APR. This class is designed for people new to real estate financing and those wanting to learn how to use spreadsheets. It's a recommended prerequisite to Rental Housing Development Finance (AH221) and other development finance courses. A basic knowledge of Excel is necessary for participation. Please be prepared to bring a laptop computer to this class. If you cannot, a loaner may be available for your use.

AH142 Designing Affordable Housing from Project Concept to Blueprint

This course will take participants through a disciplined process for designing an affordable housing project and overseeing it through construction. Steps we cover include:

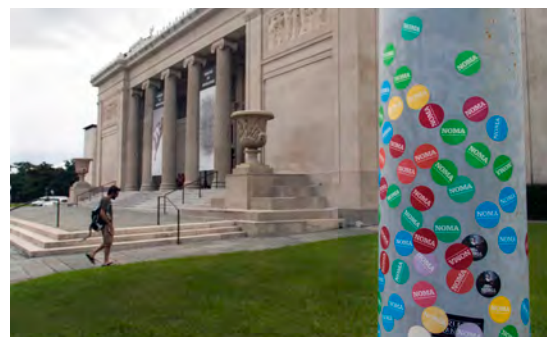
- ▶ Developing a program plan for your project, including unit size and number, community space, office space, etc.
- ▶ Balancing wants, needs and finances
- ▶ Working successfully with your architect
- ▶ Basic blueprint reading
- ▶ Value engineering
- ▶ Understanding AIA documents and other documentation
- ▶ Utilizing the Affordable Housing Design Advisor

AH211 How to Maintain Compliance in LIHTC Projects

This 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 a refresher on 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.

AH218 If It Can Go Wrong: Resolving Predictable Crises in Real Estate Development

Not all real estate development crises are predictable, but there are many instances where we could have seen them coming. These predictable challenges can happen in each phase of the development process and range from zoning and land use issues to subsidy program requirements, construction costs and partner agreements. This course will provide an overview of the psychological, organizational and political barriers that prevent nonprofit organizations from identifying and addressing "predictable surprises." Through lecture, case studies and exercises you'll learn how to recognize common threats to a development's successful completion, make them a priority and mobilize the resources required to mitigate them.





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REGISTER NOW!

AH221 Rental Housing Development Finance

In this interactive course, you'll 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. The class is 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, a loaner may be available for your use.

AH230 Investment Playbook for High-Performance/High-Efficiency Multifamily Buildings

Housing accounts for 20% of end-use greenhouse gas emissions (GHGs). Recent federal legislation makes important strides in financing green and healthy homes – including multifamily affordable housing. Expansion and reform of tax credits as well as several novel grant and loan programs are now available to affordable multifamily developers. These include incentives for solar and storage, building electrification and other efficiency measures to help build out low- to no-emission homes.

Utilizing the federal tax credits and funding as well as other federal, state and local resources, the incentive for multifamily developers to “invest in high-efficiency, high-performance” practices has never been clearer. Learners will have an opportunity to examine the scoping, funding and staffing of climate-conscious multifamily housing, as well as how to mitigate risk.

AH256 Shared Equity Housing: Creative Models to Preserve Affordable Homeownership

Shared equity homeownership is a creative tool for creating vibrant, inclusive and equitable communities. Community land trusts, shared equity cooperatives, and deed-restricted homes are models where the rights, responsibilities, risks and rewards of homeownership are shared between the individuals who own and occupy this housing and an organizational entity that stands behind the home long after it's sold. These models ensure that homes remain affordable long-term to people of modest means by restricting the amount of equity homeowners can remove from their homes on resale. In this introductory course, participants will review the most common models of shared equity homeownership, weighing the pros and cons of each model as a vehicle for promoting individual and community security, prosperity and mobility.

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 we'll explore include important asset management functions 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 and executives who supervise asset management.

AM321rq 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 running Excel, and it is assumed that all participants will be comfortable creating and working with Excel spreadsheets.





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REGISTER NOW!

AM351rq Advanced Housing Asset Management (CHAM)

Advanced Housing Asset Management (AM351) is the final course needed to earn the Certified Housing Asset Manager designation. The class will bring together all the aspects of asset management covered through the CHAM curriculum and conclude with learners completing an asset management plan for one of their properties. In Part I, students will explore techniques for analyzing and managing portfolios of properties through exercises involving both case studies and analysis of their own organizations' portfolios. Students will need to bring a laptop and will be sent materials to prepare a few weeks in advance. In Part II, students will prepare an asset management plan for one of their properties, which will be analyzed and presented in the context of their total property portfolio. This part of the course will use remote learning strategies in which participants will have the opportunity to schedule one-on-one coaching from the instructors on their property asset management plan. Each person will present a PowerPoint summary of their plan via video-conferencing to a group of fellow participants for peer and instructor feedback and insights. At the conclusion of Part II, students seeking their CHAM designation will be prepared to submit their asset management plan for review and grading.

COMMUNITY ENGAGEMENT

CB105 Foundations of Community Building and Engagement

Do you give, involve, collaborate, or power-share with residents as part of your work? Join us in comparing four different community strategies: providing services, building relationships, engaging residents and community organizing. While each community strategy can be useful, they create different benefits and lead to different results – and our organizations must understand their differences and when and how to use them. Explore how your organization currently interacts with residents and create a plan that enhances connection and collaboration with residents. Whether you're new to the field, you've been in it for decades, you represent property management or you simply don't understand what CB&E is, this course is for you. We'll dig into how community-building and engagement strategies benefit your organization, residents, local community, and your bottom line.

CB106 Laying the Groundwork for Effective and Sustainable Community Building

This course focuses on strategies vital to successful community-building activities and practices that are applicable in various areas of the community-building continuum. You'll learn about skills used in effective strategy development and implementation, and we'll have an opportunity to explore these skills through interactive activities, case studies and discussion. The course covers key approaches involved in community building and provides tools and examples to implement in your organization or community. Throughout the course, you'll spend time brainstorming and considering relevant and effective strategies best suited for your unique situation. Join us and gain new resident and community engagement techniques that will help you build meaningful relationships.

CB200 Measuring for Impact: Strategies for Success

Do you clearly understand why your organization implements its programs and community efforts? Can you learn from your work to improve the design and implementation of your programs and strategies? If you see improvements, but aren't sure how to demonstrate your intended results, or if you're considering a new approach or program, this course will guide you. The course is also relevant to people working across multiple disciplines or multiple geographic areas. You'll learn to articulate outcomes, measure and report progress and apply different frameworks like theory of change and logic models. The course helps connect your activities to desired community outcomes and measure progress through outcome evaluation. Practical exercises will enhance your understanding of data collection methodologies, integrity and reliability. We'll also explore data analysis and interpretation for different audiences and practice presenting results to specific groups with unique interests. Because evaluation cuts across so many functions, this three-day course is co-listed for registration as CB200, ED210 and NR121. The content is the same, and will include cross-functional learning as well as break-out time for specific functional areas.





COURSE DESCRIPTIONS



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REGISTER NOW!

CB270 Training Techniques: Designing and Facilitating Successful Training

Are you ready to facilitate community learning events that are effective and successful? Come learn about the fundamental steps of training facilitation and design that create a path to learning and participation. You'll gain a great understanding of various learning styles and practice methods such as small groups, role-playing, learning exercises, icebreakers and other participatory techniques. You'll explore ways to facilitate group learning and handle challenging situations. Together, we'll examine successful learning environments and discuss other training and facilitation best practices. When you leave the class, you'll be prepared to implement the eight-step planning model and effectively plan a curriculum to optimize the learning environment. In addition, you'll be able to evaluate the success of learning events at different stages and enhance their success and sustainability.

CB277 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, if you're new to resident education, begin defining it. This 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 the best recruitment strategies, practice activities, budgeting tools, organizational messaging, evaluation tools and customizable templates. Both the BLBC Experience curriculum and the CB277 training course have been fully redesigned. If you attended CB277 before 2022, we invite you to join us for the full curriculum revamp.

CB310 Understanding and Influencing Public Policy

Community Building and Engagement practitioners 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, school board or any number of bodies that make policy for the public. This course explores who makes the policies that affect our communities, how policies are made and what roles individuals and organizations can play in influencing policy – the politics of policy.

CONSTRUCTION AND REHAB

CP101 Housing Rehabilitation Design and Construction Basics

Are you a new rehab specialist? Do you work in support of a housing rehab and repair program and want a better understanding of rehab practices? CP101 is the entry course providing a crucial foundation so you can effectively communicate with program applicants, property owners, designers and contractors involved in your projects. You'll learn trade terminology, basic blueprint reading and the criteria for good affordable housing design. We'll introduce the concept of viewing the house as a system, construction basics and best practices for balancing affordability, marketability, health and safety. You'll leave with the resources, new contacts and increased confidence to positively affect your projects, no matter what your role.

CP153 Basic Blueprint Reading

This is a practical, hands-on course suitable for program staff, project/field staff and management-level leaders who want to increase their knowledge of print reading and construction drawings. The course utilizes hands-on activities with architect scales, large-format prints, digital files and job specifications to provide a thorough introduction to blueprint essentials for those entering the field or needing a working knowledge of construction plans to more effectively support their organization's development projects.

CP195 The Essentials of Healthy Homes Practitioners

The Essentials for Healthy Homes Practitioners course helps you understand the connection between health and housing and how to take a holistic approach to identify and resolve problems that threaten the health and well-being of residents. This training will help you to identify the root causes of health problems in a home and link them to the principles of healthy housing. You'll also gain a better understanding of how to collaborate to make healthy homes a reality in your community. The course was developed by the National Center for Healthy Housing/Healthy Homes Training Center.

CP196 Healthy Homes Assessment and Interventions

This course is designed to prepare participants for the next steps in healthy homes programs, progressing from identifying hazards and connections (discussed in CP195) to developing interventions and solutions to address the identified housing hazards. You'll learn about the importance of the resident interview, develop strategies for assessing the health-related hazards in a home, conduct an onsite inspection and develop a comprehensive action plan. CP195 is a pre-requisite for this course. The course was developed by the National Center for Healthy Housing/Healthy Homes Training Center.



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COMMUNITY ECONOMIC DEVELOPMENT

ED101sv Community Economic Development Principles, Practices, and Strategies

In this course we'll take a comprehensive look at the theoretical base and practical applications of community economic development and learn to define it. You'll understand 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. You and your peers will 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 foundational course includes case studies, lectures and discussion about economic development projects.

ED110 Analytical Tools and Methods Used in Community Economic Development

This course is designed to help you more effectively collect, analyze and use information in order to understand your community, analyze the local economy, and develop economic development plans and projects. You will be introduced to several primary data collection methods, become familiar with a wide range of secondary data sources, learn to use a variety of analytical techniques and improve your ability to use information to assess the local economy and evaluate potential projects. Bring a calculator!

ED160 Financing Community Economic Development

This course provides an understanding of the vast array of tools and techniques for financing CED projects and programs, including a variety of lending and equity techniques, interest subsidies, loan guarantees, tax abatements, tax credits and special assessment districts. We will review the various types of financial intermediaries and the roles that they play. Together with your peers, you'll explore many financing sources including CDBG, 108, OCS, CDFI, historic tax credits and new markets tax credits. Case study exercises will be used and participants should bring a calculator.



ED210 Measuring for Impact: Strategies for Success

Do you clearly understand why your organization implements its programs and community efforts? Can you learn from your work to improve the design and implementation of your programs and strategies? If you see improvements, but aren't sure how to demonstrate your intended results, or if you're considering a new approach or program, this course will guide you. The course is also relevant to people working across multiple disciplines or multiple geographic areas. You'll learn to articulate outcomes, measure and report progress and apply different frameworks like theory of change and logic models. The course helps connect your activities to desired community outcomes and measure progress through outcome evaluation. Practical exercises will enhance your understanding of data collection methodologies, integrity and reliability. We'll also explore data analysis and interpretation for different audiences and practice presenting results to specific groups with unique interests. Because evaluation cuts across so many functions, this three-day course is co-listed for registration as CB200, ED210 and NR121. The content is the same, and will include cross-functional learning as well as break-out time for specific functional areas.

FINANCIAL CAPABILITY, HOUSING COUNSELING AND EDUCATION

H0103 Lending Basics for Homeownership Counselors

This course is designed to introduce homeownership counselors to the basic procedures involved in first mortgage lending. Areas covered in this overview are loan origination, processing, underwriting, closing and servicing. Conventional and FHA loan products are described, along with brief discussions on credit scoring, appraisals, sub-prime and predatory lending. You'll learn how to prequalify potential borrowers, including calculating loan amounts and monthly mortgage payments.

The course is recommended for both pre- and post-purchase homeownership counselors and provides an excellent foundation for the Foreclosure Basics class (H0109).

H0105 Compliance with State and Federal Regulations

Knowing the major lending and housing regulations is a key piece of the puzzle for homeownership professionals. In this course, you'll learn how to avoid common lending pitfalls – especially those related to RESPA and the Truth in Lending and Fair Housing Acts. We'll explore violations of these federal laws and how to develop controls to ensure compliance, as well as how state regulations affect community lending. In this course participants also examine the influence of nonfederal requirements on local lending activity, including state regulations and licensing requirements, and learn about successful efforts to reduce restrictive regulations by states.



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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. You'll learn the protocols for counseling homeowners in financial crisis. We'll address 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.
- ▶ Obligations found in loan documents.

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

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 H0104el prior to taking H0111. Additional independent study after completing H0111 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 covered 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 course to gain the most useful and efficient tools to make a real difference in the lives of your clients. You'll 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 course, you'll build the skills to deliver effective financial capability programs. Financial capability programs aim 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. You'll learn how to better understand your customers, and in turn, will increase your ability to engage your customers in the program, deliver tailored services that meet their needs and keep them motivated to change behaviors and reach their goals.



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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 course, designed by professionals who have passed the exam. Utilizing the HUD Study Guide, you'll gain confidence and knowledge while learning what you need to know to pass the exam. Practice sample test questions and learn strategies with your peers as you prepare to cram. 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 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'll 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 helping them build positive credit profiles. This course is a must for the new or experienced counselor looking for tools to make credit counseling sessions more structured, efficient and productive.

H0213 Fair Housing: What Professionals Need to Know

If you're providing housing education or counseling, or if you are an affordable housing developer – be it for homeownership or rental – it is crucial that you understand the scope of fair housing laws and the consequences of their violation. This course provides a comprehensive overview of the key issues related to discriminatory practices in housing, lending and insurance, as well as the rights and remedies available under federal, state and local fair housing laws. By mastering the do's and don'ts of fair housing law, you will be able to help your clients protect their rights.



H0229 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. 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 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. You'll engage in hands-on activities that will help improve their facilitation skills and deliver interactive training sessions based on adult education methodology. Participants should be familiar with mortgage industry terminology and processes before taking this class. (Lending Basics (H0103) can be taken as a prerequisite if you need to build your knowledge in this area.) A post-course exam is required for all participants.

H0234 Pathways to Sustainable Homeownership: Creating Opportunities and Building Financial Security

Achieving homeownership is a powerful step toward financial stability and generational opportunities. But for many individuals, the path is filled with obstacles. Pathways to Sustainable Homeownership provides a comprehensive understanding of the economics and challenges that impact homeownership rates and opportunities, equipping you with the knowledge, tools and counseling strategies necessary to guide your clients through financial preparation, mortgage processes and sustainable homeownership practices. Participants will gain insight into common homebuying obstacles – such as credit access, lending practices and financial readiness – while learning solution-focused counseling techniques to help clients build confidence and resilience.

H0247 Post-Purchase Education Methods

This 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 and the pros and cons of refinancing. You'll 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 before taking this course.



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H0248 Cracking the Code: HUD Compliance for Housing Counselors

Are you working for a HUD-approved agency and not sure how that impacts the way you do your job? Being HUD-approved raises the bar not just for your organization but also for the work you do. This course gives you resources and checklists for working with clients, having complete files, managing your time and all the other things you really need to know. We review the key features of relevant national HUD programs, including fair housing, and help you crack the code of the HUD 9902 report. If you are a counselor who has achieved your HUD certification, or you want to learn more about what's involved in being a HUD-certified counselor, this is the course for you. Come learn all the tips and tools you need to help you standardize and streamline the housing counseling process.

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. You'll 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. 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 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 used in the housing counseling industry and unique tools developed especially for rental housing counseling. It will also allow you to learn through a variety of methods, including working with a Rental Counseling Process Model and hands-on experience with case study examples.

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 and people with lower incomes. As such, those groups are disproportionately affected when waves of rental evictions occur due to local or national economic events. How can organizations prepare for a rise in rental evictions, and what skills do housing counselors need to help clients avoid and reduce the negative impacts of rental evictions? This course will provide you with the knowledge, skills, and tools to effectively work with renters in crisis, navigate the local rental eviction process and collaborate with landlords, courts and other social service providers when relevant. By the end of this course, participants will have developed a set of knowledge, skills and abilities that will enable them to better support clients in preventing rental evictions and reducing harm when rental evictions cannot be prevented.

H0290 Counseling Clients to Maximize Home Energy Efficiency Savings

Counselors play a key role in training their clients to maximize savings, lower expenses and live in a safe, healthy home. Efficiency and alternative energy sources are some ways consumers can better manage their finances and maintain secure housing. In this course, you will learn:

- ▶ How a \$25 investment in energy savings-related items can save your clients hundreds each year.
- ▶ Resources and contact information for state and local weatherization programs and how to advise clients to choose a certified energy auditor.
- ▶ Tip sheets for spotting household "energy hogs" and moisture and mold problems, and how to identify a remedy.
- ▶ Financing options such as the FHA Energy-Efficient Mortgage (EEM), as well as state and other financing programs that may be available to help pay for improvements at the time of purchase or refinance.
- ▶ Energy Star appliances – what they are and whether they qualify for the \$1,500 tax incentive.

H0307 Advanced Foreclosure: Case Study Practicum

This course focuses on the skill sets that foreclosure intervention counselors need to perform. It is designed to address and practice four content areas, including core elements, analysis and assessment, solution-focused counseling skills and submission and closure of the loss mitigation package. It is an opportunity to put foreclosure intervention skills into practice in a real-world and hands-on setting. The course is recommended for counselors with at least one year of foreclosure intervention counseling experience and who have already completed H0345rq. Familiarity with foreclosure concepts, terminology, and counseling practices will be assumed.



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H0310 Financial Coaching: Helping Clients Reach Their Goals

Financial coaching is an emerging field that supports clients as they work toward goals and strive to maximize their financial potential. Through an ongoing, systematic and collaborative process, financial coaches facilitate changes in clients' financial habits so they can reach financial security. In this course, you'll gain an understanding of how to incorporate coaching techniques into your financial capability program by using practical experience and demonstration activities to learn coaching essentials. These essential skills include facilitation and listening skills, goal-setting and accountability methods. You'll 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).

H0345 Foreclosure Intervention and Default Counseling Certification, Part I

This advanced-level five-day 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. You'll engage in exercises and utilize case studies which will sharpen your negotiating skills with servicers and improve your counseling methods with clients. We recommend that participants complete Foreclosure Basics (H0109 or H0109el), which will prepare you for the advanced teachings of this course, H0345.

H0360 Homeownership Counseling Certification for Program Managers and Executive Directors

This course is designed for professionals who are working at the management level in the homeownership counseling field. Through hands-on application, managers and executive directors will learn procedures and methodology that will equip you to better manage the day-to-day operations of a housing counseling program. Specifically, you'll 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.

H0370b Next-Level Financial Coaching: Furthering Your Practice

This highly interactive course is designed for financial coaches looking to further develop their skill set in helping empower clients to take charge of their financial lives. For many, mastering coaching is a process that requires learning, practice and feedback. Building on the model and tools offered in Financial Coaching: Helping Clients Reach Their Financial Goals (H0310), the course will allow you to practice coaching skills aimed at helping clients with cash flow, savings, reducing debt, rebuilding credit and protecting their assets. You'll be guided by expert coaches who will offer real-time feedback, strategies for using coaching with complex personal situations and topics and additional coaching skills and techniques that will deepen your coaching practice and further your impact with clients. Prerequisite: Financial Coaching: Helping Clients Reach Their Goals (H0310).

The blended course begins with a two-day, in-person class to review and apply how to use a coaching approach to help clients change financial behaviors and reach financial goals. That is followed by two weeks of online learning, including two 90-minute live sessions with the instructor to deepen your coaching practice and knowledge. The course results in a plan for further integration of coaching skills into your work. Learners are required to complete both the in-person course (100% attendance) and receive a passing score in the online portion of the course to obtain your certificate of completion.

H0375 Financial Capability Program Design for Managers

Successful financial capability programs deliver a combination of knowledge, skills and access that can help consumers change their behaviors and successfully build financial health. Elements of these programs include financial education, access to financial products and services and individual relationship-building – all of which can be administered using a variety of approaches and tools. Whereas Delivering Effective Financial Education for Today's Consumer (H0209rq) looks at how to directly deliver financial education at the client level, this class broadly addresses how organizations can successfully design, integrate and sustain a financial capability program based on the needs and goals of their target audience. Ideal for program managers and executive directors looking to launch or expand financial capability services, the course will present you with a roadmap and tools to put your program together from enrollment to outcomes measurement.



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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 your organization's work. We'll review HUD programs, discuss ways your organization can affirmatively further fair housing, take a detailed look at the HUD 9902 report, and prepare you for your next HUD audit. If you are responsible for managing a HUD-approved housing counseling program or 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

Trauma is a widespread and common experience that can have long-lasting effects on people's behaviors and thoughts. These effects can make it harder for individuals to engage with and remain in financial coaching services. For individuals and communities facing long-term adversity and structural barriers, trauma may be more prevalent due to both systemic changes and personal hardships. Building a trauma-informed environment in your financial coaching program helps more people feel comfortable participating and supports better financial outcomes for those who have faced serious life challenges and barriers. This approach understands that trauma is common and focuses on creating a sense of safety and trust for clients throughout the program. This course will provide you 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 Part 2: Program 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 a single organization or via partnerships with multiple entities include outreach, counseling or coaching, financial assistance, legal services and wraparound services. In this program design course, you'll explore different program models and best practices for offering eviction intervention services that suit local

needs. You'll examine your organization's capacity and identify how you can conduct outreach, develop partnerships, track outcomes and plan for sustainability. The class has been designed for program managers of housing counseling, financial capability, and resident services programs, housing and financial counselors, financial coaches, resident services staff and senior leadership.

SINGLE-FAMILY AND SMALL BUSINESS LENDING

LE210 USDA Section 502 Direct Loan Application Packaging: Affordable Rural Homeownership

This 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, you'll learn the regulations and practical applications of the loan program. You'll 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!



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LE241 Intermediate Underwriting for Micro and Small Business Lenders

This intermediate-level course is designed for lending practitioners with prior experience in lending to businesses or managing revolving loan funds. Participants will learn and employ the analysis techniques of finance professionals — the five Cs of credit. You'll analyze financial statements and other types of information using a variety of commonly used financial ratios and will explore both the benefits and limitations of these methods. You'll also learn how to structure loans to mitigate different types of risks. This course will be highly interactive, allowing participants to relate their own lending experiences to the case studies and other examples used in class. Emphasis will be placed on working in groups so participants can be exposed to the analysis techniques and lending philosophy of peers.

LE250 Community-Based Residential Lending: Outreach, Intake and Loan Application Best Practices

This intermediate-level course is designed for residential mortgage loan originators (MLOs) working for nonprofits and other community-based mortgage lenders. It primarily focuses on the outreach, intake, and application steps in the mortgage origination process, including best practices and compliance considerations. Course content is geared towards the typical duties and responsibilities of these MLOs or others within a lending organization serving in a similar role of prospecting for residential lending customers and/or working with them during outreach, intake/assessment and formal loan application. Activities focus on the unique considerations that confront community-based MLOs. Participants will also be provided with detailed guidance and strategies on how to develop and manage a successful personal production plan.

LE320 Effective Board Governance for Lending Operations

This course focuses on what it takes to ensure that your board of directors is working effectively to support the work of your CDFI or lending operation. You'll look at key board roles and responsibilities and reflect on your board composition and alignment with organizational growth. You'll also examine the different information, tools, resources and structures the board needs to do its job effectively, including training, committee structures, loan policies, reports, ratios and dashboards.



NONPROFIT MANAGEMENT AND LEADERSHIP

ML109 Developing Your Leadership Potential

This course explores the skills, qualities and responsibilities of effective leaders. You'll identify your individual leadership strengths and weaknesses, build new capacity and utilize tools to become stronger leaders. You'll understand common barriers to realizing leadership potential and learn techniques and tools to recruit and motivate new leaders. During the class, participants will work interactively with peers also seeking to grow their leadership talents. Come prepared to draft your personal leadership development/action plan!

ML127 Designing and Delivering Dynamic Presentations

This comprehensive training equips learners with essential skills and strategies to confidently craft and deliver compelling in-person and online presentations that inform, captivate and inspire their audience. Through a blend of interactive exercises and experiential learning, you'll gain a step-by-step process and tools you can use to tailor any presentation to your audience's unique interests.

ML150 Unlocking Your Team's Potential With AI

Join us for a highly interactive course and gain a clear understanding of AI, its applications and strategies to integrate effective use of AI into your daily work. Through real-world examples, interactive exercises and guided discussions, you'll learn how to recognize AI when you see it, understand its core functions and grasp the fundamentals of AI prompting and key terminology. Additionally, you'll explore with your peers the best ways to leverage AI to increase efficiency and productivity, ethical considerations and best practices for AI use. You'll leave with solid ideas about ways you can implement AI strategies to meet your organization's needs and maximize your impact. NOTE: This interactive course is designed for leaders and team managers with little or no prior AI experience.

ML170 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. An extremely interactive course, ML170 reveals key resource development concepts for organizations creating and supporting vibrant communities and social change. This course is designed for those responsible for identifying and capturing resources to bring to their community development organizations. You'll explore how to develop a "culture of philanthropy" that engages all stakeholders in supporting your resource development efforts.



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ML220 The Art and Science of Group Facilitation

Facilitation is both an art and a science. Most of us learn to facilitate by just getting up and doing it. But there is an important science that allows us to be our best and to have the greatest impact. This highly interactive course will focus on values, methods and models that ground our practice. We will examine how our roles impact our facilitation approach. We will practice techniques for moving groups towards decision-making and discuss strategies for managing behavioral issues. This course is intended for those who have had facilitation experience and would like to ground their practice with a framework while further enhancing their skills.

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.

ML236 Using Tableau to Visualize Impact and Tell Your Story

With funders regularly expecting quantifiable outcomes from their partners, your nonprofit's ability to communicate its impact through high-quality data visualizations is an increasingly critical skill. This intermediate-level, hands-on computer lab course will teach participants the basics of Tableau software, and how to turn large data sets into informative visualizations that can be used with your staff, board and funders. We'll analyze sample programmatic data and learn how to put those findings into context by integrating them with external market data. Participants will have an opportunity to analyze their own data in Tableau and leave with technical skills in the software, a list of online data resources including how to apply for free Tableau licenses and a better understanding of how to bring data into decision-making conversations. NOTE: This course is intended for data practitioners or analysts with a basic understanding of analytical methods and how to manipulate data (e.g. creating pivot tables or interpreting scatterplots).

ML245 Identifying, Cultivating, and Leveraging Distinct Leadership Types

Have you ever been drawn to an incredible leader, only to find out that someone else thinks they're a terrible leader? Or maybe you've been confused why others are drawn to a leader you could never support? The reality is that not all leaders are the same. Even though many of us may describe leadership similarly, the ways we lead and the expectations we have for leaders are often very different. This course digs into how our backgrounds, life experiences and social norms influence how we lead. Equally important, we explore how those factors influence the way we assess other leaders around us. Together, we'll look at leadership from two angles. First, we'll consider the way you lead — including how you think, feel and act as a leader. Then, we'll explore how our own perceptions and background impact our expectations for emerging leaders around us. If you're motivated to strengthen your own leadership skills, cultivate new talent within your organization and hone your skills in identifying and supporting local community leaders, we invite you to join us!

ML246 Leadership in All Directions: The Unique Role of a Senior Manager

Division directors, C-suite "chiefs" and those who report directly to the chief executive play vital roles in ensuring an organization's success and ongoing impact. To be effective, they must master the art and science of 360-degree management -- up to the CEO or ED, laterally through influencing their senior leadership peers, down to those who report to them and often externally to key stakeholders, board committees and funders. This advanced-level course will examine each of these leadership and managerial "directions" in more detail. We'll draw upon case studies, real-life participant experiences and future aspirations to illustrate key tools and principles to optimize your management and leadership ability.

ML251 Developing Successful Partnerships with Native Organizations

Is your organization planning to partner with a Native community or organization? Do you have a Native community in your service area that you'd like to serve? Would partnering with a Native organization fit and support the mission of your organization? In this course, we'll examine the ingredients necessary to create successful partnerships in Native communities. We'll begin by looking at culture, the differences between Western and Native cultures and the impact of these differences on partnerships. We'll take an in-depth look at the history of Native America, sovereignty and federal trust relationships and Native economies. You'll learn a step-by-step process to develop an actual partnership, including learning about the potential partner community, developing internal capacity and conducting effective outreach. By the end of the training, you'll develop a draft partnership plan tailored to your specific situation.



COURSE DESCRIPTIONS



For a complete list of course offerings for this institute, check out the course grid on page 5. To read full course descriptions for each content area and to register online, visit <https://collaboration.net/nolanti2025>

REGISTER NOW!

ML274 Exploring Excellence in Governance

As the nonprofit sector has matured and adapted in the last decade, there has been a growing interest in boards of directors moving from traditional, technical oversight to a more strategic – and even generative – model of governance. The technical board most often identifies the nonprofit's current opportunities and challenges in terms of today's data and circumstances. The strategic board sets direction and designs solutions, and the generative board seeks opportunities to re-imagine future possibilities and impact. Using case studies and small- and large-group exercises, this highly interactive course explores the shift from governance as compliance and monitoring to governance as strategic thinking and creative engagement. You'll work throughout the day on a governance action plan with feedback/coaching from both instructors and peers. ML274 is designed for nonprofit board leaders and members as well as nonprofit CEOs and executives who work closely and collaboratively with board members.

ML276 Developing a Donor Communications Plan

Between never-ending "to-do" lists, lots of options for raising money and new communications channels popping up every day, it can be hard to pause and look at the bigger picture. Take a break from "business as usual" and participate in this intermediate-level workshop that will help you identify and stay focused on the best ways to connect with individual donors and prospects. We'll help you get to know your donors, decide what strategies might guide your efforts, generate ideas for specific communications activities, learn how to measure your progress and start developing an initial workplan to help you manage it all.

ML282 How to Negotiate: The Most Important Skill You Will Ever Learn!

The ability to come to mutually acceptable agreements with other people is a vital skill applicable in our professional and personal lives. This course is designed to build each participant's capacity to transform adversarial approaches to negotiation into problem-solving collaborations, producing better outcomes for all parties while enhancing long-term working relationships. The training will stimulate your awareness of the complexities of negotiation, and will equip you with a framework for understanding, diagnosing and leading the negotiation process in any situation. You'll conduct negotiation role plays to apply skills in a hands-on learning environment.



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. This course is designed to help you understand your own sources of influence and how to influence clients, colleagues and teams even when you don't have the authority to mandate compliance. We'll 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.

ML287 Coaching Teams to Build Leadership

Coaching is an important partnership that capitalizes on human potential. It taps into existing strengths to facilitate the development of new perspectives, skills, visions and plans. In the business world, coaching often focuses on a coach and an individual; this course shifts that focus to a coach and a team. Coaching can be a powerful tool for supporting and sustaining team growth and transformation beyond the coaching relationship. This course will help you adapt many traditional one-to-one coaching skills, as well as develop new skills for a group context.

ML297 Leadership Tools for Achieving Excellence

This intermediate-level course provides an overview of the key concepts, approaches and frameworks of the NeighborWorks Achieving Excellence Program (AE). Using AE frameworks and a series of hands-on exercises, you'll work on a real-life challenge of your choice. You'll define a vision for success, create your own performance challenge and apply approaches and tools to assist with work planning, strategy development, management and leadership related to your challenge. At the end of the course, you'll have a body of work relevant to a real-life issue as well as a toolkit of leadership skills and knowledge that can be applied in other contexts. Ideal participants include graduates from the early classes of Achieving Excellence seeking a refresher; partners, staff or board members of past or present AE participants; and others who have heard about Achieving Excellence and would like to know how to better address important challenges in their work.

ML312 Organizational Leadership Succession

Leadership succession is an ongoing and adaptive process, and this course offers methods for integrating succession planning into organization-wide systems and culture. The highly interactive course covers major elements, success factors and effective practices involved in preparing for succession in key staff and board leadership positions. You'll have an opportunity to assess the readiness of your organization, explore the development of internal leadership and talent and identify action steps for enhancing the conditions for successful leadership transitions. Ideal attendees include nonprofit organization executives and managers, as well as board members.



COURSE DESCRIPTIONS



For a complete list of course offerings for this institute, check out the course grid on page 5. To read full course descriptions for each content area and to register online, visit <https://collaboration.net/nolanti2025>

REGISTER NOW!

ML322 Streamlining Operations for Greater Sustainability

Operational efficiency and a focus on continuous process improvement are key factors in being able to grow in scale to reach greater sustainability as a social enterprise. This course will challenge you to reconsider the status quo in how you run your organization and deliver your services. You'll learn how to streamline both office operations and service delivery processes by identifying costly redundancies, non-value-added activities and waste, and you'll plan how to eliminate waste and revise existing procedures to be more consistent with the desired future state. Process improvement undertakings are most effective when executives as well as managers and staff are involved in a collaborative effort, so we encourage teams to train together. Recommended attendees include department/program managers, program staff and executive and senior management staff of nonprofit organizations.

ML396 Organizing Neighborhoods for Emergency Response

According to the Federal Emergency Management Agency (FEMA), a community-centric approach for emergency management offers a more effective path to building societal security and resilience. This approach should focus on strengthening and leveraging what works well in communities on a daily basis. This course will teach you fundamental strategies and skills that will create strong, localized social networks to increase the response and recovery resiliency of your community should it be hit by a natural or "human-made" disaster. You'll learn how to connect community organizations with existing emergency response and management structures.

ML397 Are You Prepared? Disaster Preparedness and Business Continuity Planning

Being responsive in the wake of a natural or man-made disaster means being prepared for a variety of inevitabilities. This course will lead you through a set of strategies and tools for the development of an effective Business Continuity Plan (BCP) for your organization. Participants will learn the value of business continuity planning to their organizations' own sustainability and resilience as well as how the plan can assist the community at large with recovery.

NATIVE AMERICAN COMMUNITY DEVELOPMENT

NA200 Mortgage Lending on Tribal Land

This course is designed for lenders interested in expanding their mortgage lending lines of business to serve borrowers residing on tribal land. You'll learn about legal jurisdiction, collateral issues, loan processes and loan products unique to Indian Country. You'll also gain knowledge about how to successfully partner with local entities, navigate residential real estate considerations and implement meaningful lender engagement strategies. By the end of the course, you'll understand how to implement a successful mortgage lending program on tribal land.

NA275 Building Native Communities: Trauma-Informed Financial Practices

This course is designed for Native financial practitioners who want to become more informed of the trauma created from the current financial systems and how to best support their clients. It will help you better understand trauma-informed delivery, the unique history, relationships, and experiences of money in Native communities, and how to better serve Native clients. This course was developed by Oweesta Corporation as part of their Building Native Communities and Native CDFI Practitioner Certifications. NeighborWorks is proud to partner with Oweesta on this course. For more information, [visit Oweesta's website](#).

COMMUNITY AND NEIGHBORHOOD REVITALIZATION

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 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 course, you'll have a chance to step back from the day-to-day to think about your organization's work and its impact on "place" – the area residents live in. You'll learn about the principles of place-based comprehensive community development (CCD), its history and lessons learned, and a variety of approaches that organizations are successfully taking right now. We'll visit a local organization implementing a place-based CCD strategy and learn about their approach, partnerships, measures of success and resources. Finally, you'll use a CCD organizational self-assessment tool to identify and discuss where you think your organization is with regard to CCD principles around capacity and practice. 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.





COURSE DESCRIPTIONS



For a complete list of course offerings for this institute, check out the course grid on page 5. To read full course descriptions for each content area and to register online, visit <https://collaboration.net/nolanti2025>

REGISTER NOW!

NR115 Developing High-Impact Neighborhood Revitalization Strategies

This is a course about aligning specific actions to achieve a neighborhood vision. It is designed for practitioners, policymakers and funders who want to achieve greater neighborhood impact through their revitalization work. The course provides a practical approach to neighborhood change that acknowledges and works with market forces to attract the kinds of investments neighborhoods need. You'll benefit from an in-depth neighborhood case study and hands-on work assessing neighborhood conditions, developing outcomes and strategies and planning around potential obstacles to achieving change. This course has a heavy emphasis on implementation, and you'll take home useful tools and resources that can inform your work on the ground.

NR121 Measuring for Impact: Strategies for Success

Do you clearly understand why your organization implements its programs and community efforts? Can you learn from your work to improve the design and implementation of your programs and strategies? If you see improvements, but aren't sure how to demonstrate your intended results, or if you're considering a new approach or program, this course will guide you.

The course is also relevant to people working across multiple disciplines or multiple geographic areas. You'll learn to articulate outcomes, measure and report progress and apply different frameworks like theory of change and logic models. The course helps connect your activities to desired community outcomes and measure progress through outcome evaluation. Practical exercises will enhance your understanding of data collection methodologies, integrity and reliability. We'll also explore data analysis and interpretation for different audiences and practice presenting results to specific groups with unique interests. Because evaluation cuts across so many functions, this three-day course is co-listed for registration as CB200, ED210 and NR121. The content is the same, and will include cross-functional learning as well as break-out time for specific functional areas.



NR160 Building Healthy Communities for Comprehensive Outcomes

This introductory course is designed to expose participants to the broad, interdisciplinary work of health equity. It will provide you with an overview of the foundational knowledge to prepare you and your organization for community-based work focused on health equity, social impact and systems change. In this course, you'll explore a variety of approaches for both understanding and rooting history in order to understand the impact of health on socioeconomic and community outcomes – including the social determinants of health, root cause analysis, ecosystems analysis and more. You'll leave with a working draft of a health equity narrative for your community. Although not required, we recommend that you take this course prior to Centering the Community in Health Equity Work (NR230) or Community Projects in Health Equity Work (NR260) for an optimal experience.

NR165sv Foundations of Community Health Worker Models

Community Health Worker (CHW) programs are an integral part of the affordable housing and community development landscape. This course explores the eight major components of a CHW program that organizations should consider when implementing a CHW model. Real examples, stories, and challenges directly sourced from the CHW programs are embedded throughout the course to provide a window into the nuances you'll experience in implementing a CHW program in your organization.

NR190 Make It Creative: Leveraging Arts and Culture for Affordable Housing and Community Development

How can partnerships with artists and culture bearers help build and preserve affordable housing in innovative ways? Join researchers and facilitators from ArtPlace America to explore and contribute to an emerging body of research and practice regarding the role of arts and culture in building affordable housing and sustainable and healthy communities. Artistic practice can often be seen as too abstract to include in housing projects – or only valuable for aesthetic improvement – but this course will demonstrate that cultural work can be a critical tool needed to raise awareness regarding housing challenges, bring neighbors together and organize successful housing policy wins in a community. Through case study exploration and workshoping, you'll learn how to partner with artists and other creatives, conceptualize creative projects, incorporate culturally relevant design elements into your projects and workshop other tangible skills related to collaborative practice. Featured case studies will illustrate how arts and cultural strategies can help to build better and more culturally responsive affordable housing, enact anti-displacement strategies in weak- and strong-market neighborhoods and develop regenerative practices for geographies lacking basic infrastructure and more.

COURSE DESCRIPTIONS



For a complete list of course offerings for this institute, check out the course grid on page 5. To read full course descriptions for each content area and to register online, visit <https://collabornation.net/nolanti2025>

REGISTER NOW!

NR290 Make It Count: Measuring the Impact of Arts in Your Community

What role do the arts and cultural expression have in your community's economic and social development? How can you feasibly track and assess the impact of the arts in your community? In this course, you'll learn techniques for analyzing your community's capacity for developing local arts, as well as how to create and evaluate different creative strategies for maximum impact that will support the revitalization of your community. This interactive course includes case studies, dynamic group exercises, and class discussions.

NR305 Understanding Upzoning: Changing Rules, Changing Communities

Throughout the country, a housing supply shortage has resulted in record rent levels and house prices, whether the community is urban, rural, Tribal, suburban or ex-urban. One reason for limited housing supply is local zoning, which often precludes any housing form besides single-family. This course will examine how zoning affects housing and how certain zoning changes can expand options for today's families. We'll review the latest research about the impact of zoning on housing costs, affordability, gentrification, displacement and overall housing supply. Zoning to allow manufactured housing will be a common example used throughout the course, along with other new thinking from around the country. Looking past the NIMBY-YIMBY fights, we'll delve into the underlying issues both in favor of and against zoning for greater density. You'll gain knowledge of zoning, land use, how to initiate or support changes at the community, local or state level and what to expect once zoning does change – and you'll head home with your own a customized strategy.

NR390 Make It Last: Integrating Arts and Analysis to Leverage Creative Community Development

This advanced, workshop-based course will offer participants the tools needed to incorporate creative and culturally relevant elements into a holistic and responsive community organizing and development practice. You'll practice developing key insights about your community, identifying oppressive conditions that have caused harm, imagining new ideas for nourishing programs and physical changes and implementing programs, collective decision-making and accountable governance. This course builds on content learned in NR190 and NR290; participants may also decide to join if they are well-versed in integrating creative strategies into equitable and creative community development without prior NeighborWorks coursework.

RURAL COMMUNITY DEVELOPMENT

RD130 Rural Community Economic Development

This course is specifically designed for those who are working to serve the community development needs of rural areas. We'll begin by exploring the basics of rural community economic development (CED), and understanding concepts like the multiplier effect and capital leakage, as well as the difference between basic and non-basic industries. We'll cover key topics for rural CED including capital needs, broadband expansion and building a pipeline of leaders of color. Case studies, exercises and examples developed specifically to illustrate the nuances of working in rural communities will be used to highlight best practices in rural community economic development in the U.S. today. You'll learn how your economic development program can make informed choices about tools and strategies such as loan programs, targeted real estate projects, job training programs or business incubators. We'll also delve into the unique challenges that economic development programs in rural areas encounter.



SYMPOSIUM: SY905

Building Coalitions for Generational Wealth

WEDNESDAY, AUGUST 27 • 8:30 A.M. – 4 P.M.
HILTON NEW ORLEANS RIVERSIDE

So much work in housing and community development focuses on how to establish or improve financial well-being – setting and achieving goals like affording an education or homeownership, repairing credit...But what about preserving financial well-being and passing it on to the next generation? When a homeowner dies without a clear will and multiple descendants informally inherit their property, it can pose legal challenges and even cause loss of the home. This can strip a family of wealth and equity built up over the years. It is critical we find solutions to prevent and cure these property ownership questions. What can be done to ensure that individuals and families remain stably housed over time, can continue to afford their needs and wants and are in a solid position to prepare the next generation for financial security?

Join us for a generative and practical day-long symposium where we'll explore approaches to address property inheritance challenges. As with so many complex issues facing communities across the country, there is no one easy solution to heirs' property – and we need to collaborate effectively to make a real impact. So together at this event, we'll focus on coalition-building for frontline practitioners and examine alternatives for involving partners across sectors to create workable solutions for clients.

And at a place and time that marks the 20th anniversary of the devastation of Hurricane Katrina, we'll consider how estate planning is also a critical disaster preparedness strategy. When most of a household's wealth is tied up in their home, it's

important to plan in advance for recovery and maintaining financial security in case that property is damaged or destroyed.

Big-picture concepts will be presented on the main stage by expert speakers and thought leaders, and by panelists with valuable experience and lessons learned. Then we'll have an opportunity to really dig into the issues and opportunities in small groups, providing a venue for valuable peer learning.

By the end of this fast-paced day, you'll leave with a strong sense of not only what works to preserve and support cross-generational wealth, but what your organization could do to make a real difference in addressing property inheritance issues for your community.



THROUGHOUT THE DAY...

Attendees will learn about how many sectors can bring their expertise to the table to build a coalition that makes a difference for people writing wills and navigating heirs' property. Speakers will incorporate the unique perspectives of:

- ▶ Legal aid providers
- ▶ Financial services providers
- ▶ Policy experts
- ▶ State and local government champions
- ▶ Data/research professionals
- ▶ Communications staff
- ▶ Frontline service providers (housing counselors and community engagement staff)

ROUND OUT YOUR SYMPOSIUM EXPERIENCE WITH THESE RELATED COURSES – AND SET YOURSELF UP FOR SUCCESS WHEN YOU RETURN HOME!

- ▶ HO208 Building Skills for Financial Confidence
- ▶ HO209 Delivering Effective Financial Capability Programs
- ▶ HO234 Pathways to Sustainable Homeownership: Creating Opportunities and Building Financial Security
- ▶ HO310 Financial Coaching: Helping Clients Reach Their Goals
- ▶ HO370 Financial Coaching Advanced Practicum: Taking Your Practice to the Next Level
- ▶ HO375 Financial Capability Program Design for Managers
- ▶ HO385 Using Trauma-Informed Skills in Financial Coaching

MADE POSSIBLE IN PART BY

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DISCOVER THE FUTURE OF NONPROFIT TECH AT OUR TECH SHOWCASE

MODERN TOOLS FOR MEANINGFUL CHANGE

Wednesday August 27, 2025
7 a.m. – 5 p.m.

Join us to explore cutting-edge technologies that will empower your organization to streamline operations, enhance capacity and amplify impact. Engage with representatives from leading tech companies serving the nonprofit sector while networking with fellow participants. You'll get a chance to see new tech in action and have your questions answered by people in the know.

Refreshments and prizes are part of this fun event!

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And More to Come...

BEYOND CLASS — CONNECTING WITH PEERS

We’ve been intentional about including expert instruction in the NeighborWorks Training Institute. But each day, we’ve built in free time outside of class hours so you can fully enjoy the benefits of being in community with fellow practitioners. Relaxing, rejuvenating, networking or getting out in the city – your choice! Whatever you choose to do, peer learning and networking informally with colleagues, and reflecting on how you’re growing, is important – it encourages a relaxed, positive and open mindset and truly brings your learning to life!

Check out the fun and impactful activities we’re offering and be sure to participate as time permits.

7:00am - 8:15am: Before Class	
8:30a.m. - 9:45a.m.	Class
9:45am - 10:30am: Mid-Morning Break	
10:30a.m. - 11:30a.m.	Class
11:30a.m. - 1:00p.m.	Lunch
1:00p.m. - 2:15p.m.	Class
2:15pm - 3:00pm: Mid-Afternoon Break	
3:00p.m. - 4:00p.m.	Class
4:00p.m. - 4:30p.m.	Break
4:30pm - 6:00pm: Afternoon Activities (Optional)	



We’ll update our website and the registration site with additional information on these sessions as it becomes available. Complete details and registration for these activities will also be available onsite — look for an information table at Onsite Registration to assist you!

MONDAY ACTIVITIES

Ongoing Beginning Monday › Walking Challenge

Put on your walking shoes, grab some water and rev up your Fitbit! Starting Sunday and going through Thursday, document your mileage and compete with fellow participants for prizes!

11:30 a.m. — 12:30 p.m. › Meet, Greet and Eat

Lunch is on us! Join your fellow participants for a festive luncheon (and remember there is no bad meal in New Orleans!).

TUESDAY ACTIVITIES

Power Sessions

Power Sessions are 45-minute, dynamic and interactive learning engagements designed to spark new ideas and offer practical takeaways. These sessions are not traditional lectures – they are fast-paced, participant-centered experiences that focus on innovative business solutions, community best practices, and emerging trends. They aim to maximize engagement and relevance within a compact format that encourages meaningful exchange, even in a limited time. Depending on the specific topics (look for announcements onsite!), Power Sessions may include live demonstrations, roundtable discussions, or storytelling formats — all designed to energize and inspire you and connect you with your peers.

Continued on Page 26

BEYOND CLASS — CONNECTING WITH PEERS

Continued from Page 25

TUESDAY ACTIVITIES

4:30p.m. — 7:30p.m.

ELEVATE Communication Forum (Hosted by NeighborWorks Field Operations)

Strengthen the capacity of your organization's public relations and communications function while networking with fellow communications pros! This offsite evening offers three valuable components:

- ▶ In "ER 4 PR," the first 30 registrants receive a complimentary one-on-one 30-minute consulting session with a PR professional who will provide tailored guidance to address your specific communication challenge.
- ▶ The Power PR Panel will give you an opportunity to learn from a panel of experts and engage in a dialogue about industry trends.
- ▶ You can visit vendor booths in our Micro-Marketing Showcase for tools, resources and the latest industry innovations.
- ▶ Light refreshments and beverages will be served.

You must register for this course in advance on our event platform – the same way you register for courses. Join us to ELEVATE your skills, social capital and organization! For more information contact the Public Affairs & Communications Advisors at paca@nw.org.



We'll update our website and the registration site with additional information on these sessions as it becomes available. Complete details and registration for these activities will also be available onsite — look for an information table at Onsite Registration to assist you!

WEDNESDAY ACTIVITIES

7:00a.m. — 5:00p.m. › **Tech Showcase (see page 24)**

Join us for dynamic, interactive sessions designed to spark new ideas and practical takeaways. Focused on innovative business solutions, best practices, and the latest trends, these sessions prioritize engagement over lecture. Depending on the topics (announced onsite), Power Sessions might include live demonstrations, roundtable discussions and storytelling formats designed to energize and connect you with fellow participants.

Power Sessions

Power Sessions are 45-minute, dynamic and interactive learning engagements designed to spark new ideas and offer practical takeaways. These sessions are not traditional lectures – they are fast-paced, participant-centered experiences that focus on innovative business solutions, community best practices, and emerging trends. They aim to maximize engagement and relevance within a compact format that encourages meaningful exchange, even in a limited time. Depending on the specific topics (look for announcements onsite!), Power Sessions may include live demonstrations, roundtable discussions, or storytelling formats — all designed to energize and inspire you and connect you with your peers.

THURSDAY ACTIVITIES

Power Sessions

Power Sessions are 45-minute, dynamic and interactive learning engagements designed to spark new ideas and offer practical takeaways. These sessions are not traditional lectures – they are fast-paced, participant-centered experiences that focus on innovative business solutions, community best practices, and emerging trends. They aim to maximize engagement and relevance within a compact format that encourages meaningful exchange, even in a limited time. Depending on the specific topics (look for announcements onsite!), Power Sessions may include live demonstrations, roundtable discussions, or storytelling formats — all designed to energize and inspire you and connect you with your peers.

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/nolanti2025> by Tuesday, July 22, 2025. If you do not require lodging, you can register on-site based on course availability. See [the event step-by-step registration visual guide](#).

SCHOLARSHIPS

Limited scholarship assistance is available to nonprofit organization staff. For more information, visit <https://training.nw.org/>

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 a 30% discount on course tuition, directly applied to your check-out 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 Experience team at least 75 days prior to the event for accessibility requests that may require procurement of support services, such as ASL interpretation. For other accessibility requests related to course attendance or lodging, please notify us no later than July 22, 2025.

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 August 5, 2025. NeighborWorks Network registrants receive free lodging on a first-come/first-served basis when selecting a lodging package.

REGISTRATION CHANGES

Registrants may make course exchanges directly in the virtual event site until July 22, 2025. 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.

SUBSTITUTIONS

Substitutions will not be processed for this event.

CANCELLATIONS/REFUNDS

Please cancel in writing via email by no later than Tuesday, July 22, 2025. Cancellations after Tuesday, July 22, 2025, 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](#) 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 8:30a.m. — 4:00p.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 committed to ensuring a comfortable, productive event for all attendees. Participants are asked to agree to code of conduct, health and safety protocols at the time of registration, and assume any risks related to their participation. Please visit [the event resources page](#) for details on the event policies and liability waivers, FAQs, travel and safety tips and other helpful information. Participants who do not adhere to protocols will be asked to leave the event with no refund.

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.



KEY EVENT DEADLINES:

- July 22, 2025: Registration Deadline for in-person event
- July 22, 2025: Last day to make course changes for the in-person event
- July 22, 2025: Recommended last day to cancel from the event if your plans have changed

Join us Aug. 13 from 12:30-1:30 p.m. (ET) for an engaging Know Before You Go session that sets the stage for what's to come at the NTI in New Orleans!

NeighborWorks staff will let you know what to expect at the NTI and answer questions before you arrive at the event. We look forward to hosting you!

For more event information visit: NeighborWorks.org/nolanti2025

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

UPCOMING EVENTS YOU CANNOT MISS

We're committed to supporting the important work you do and furthering the impact of our field. To keep your skills sharp, discover new approaches to improving the lives of your community residents and enhance your career progress, join us for these exciting online and in-person offerings. You'll go home with guidance from experts, updated strategies, and the inspiration and peer contacts to put it all to work.

CONCENTRATED ONLINE LEARNING AT THE VIRTUAL TRAINING INSTITUTE

Join us in May for two weeks online professional learning. Week One presents more than 35 timely webinars, and Week Two presents popular multi-session courses. And don't miss our FREE Spotlight Webinar on personal branding for career growth! Neighborworks.org/SpringVTI2025

LEARNING WITH YOUR TEAM

See courses you'd like to share with colleagues in your office or partners in your community? We can handle that for you – conveniently and cost-effectively. Find out more about bringing the benefit of NeighborWorks-quality learning to your town! NeighborWorks.org/GroupLearning

UP-TO-THE-MINUTE WEBINARS AND IN-DEPTH FACULTY-LED MULTI-SESSION COURSES

We offer a wide range of courses almost every week. You can grow your skills and save your travel budget at the same time. NeighborWorks.org/OnlineTraining

NEIGHBORWORKS TRAINING INSTITUTES

Plan to participate in a week of expert-led and peer learning, career-building and personal growth. Save these dates next year:

Chicago, IL (Feb. 23-27, 2026)

Miami, FL (Aug. 10-14 2026)