

The NTI logo consists of the letters "NTI" in a bold, white, sans-serif font, set against a solid blue rectangular background.

NTI

A long-exposure photograph of a Philadelphia street at night, looking down the street towards the illuminated Independence Hall in the distance. The street is lined with tall buildings, and the lights from the street lamps and buildings create a warm, golden glow. Light trails from cars are visible in the foreground.

NEIGHBORWORKS TRAINING INSTITUTE

FEBRUARY 10 – 14, 2025 • PHILADELPHIA, PA

A FULL WEEK OF PROFESSIONAL LEARNING

COMPLETE WITH:

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

The NeighborWorks America logo features the word "NeighborWorks" in a stylized font with a house icon above the "i" in "Neighbor". Below it, the word "AMERICA" is written in a smaller, all-caps font, separated by a horizontal line.

NeighborWorks®
AMERICA

WELCOME TO PHILADELPHIA

PHILADELPHIA PLAYED A KEY ROLE IN THE FOUNDING OF OUR COUNTRY – AND SO IT'S A FITTING SETTING FOR OUR FIRST TRAINING EVENT OF THE NEW YEAR. Change, challenges and opportunities lie ahead. Are you and your organization ready?

The NeighborWorks Training Institute is a great place to build your skills and grow your career – and return home with the knowledge, tools and inspiration to achieve positive change. Join us in the City of Brotherly Love and choose from more than 75 courses to enhance your impact – including updated or newly designed sessions on communication, microenterprise, fair housing, and coaching skills. And after class hours, we'll provide additional growth opportunities in the form of hot-topic workshops and fun, interactive activities that deliver peer learning and help you to build your professional network.

In your free time, our host city offers an authentic mix of culture and history with enough character and charisma for everyone! Philly has a reputation as a model for sustainable growth, combining the best of an urban experience with affordability and diversity. The city's neighborhoods feature Irish pubs, Italian markets, and a Chinatown District; but the first food stop for any Philadelphia visitor is the Reading Terminal Market, one of the nation's oldest working markets and home to more than 80 merchants (located directly below the convention center where the training institute will take place!). Sample local favorites like a Philly cheesesteak, hoagies (one of Philadelphia's oldest, most popular sandwiches), stromboli or tomato pie.

If you're a history buff, you'll love the concentration of U.S. history: Liberty Bell Center and Independence Hall (where the Declaration of Independence was adopted in 1776, and the U.S. Constitution a little more than a decade later). Philly also enjoys its status as one of the nation's most sports-crazed cities, with nine professional teams including the Eagles, Phillies, 76ers, and the Flyers. Philadelphians love the nightlife, and the city was voted as one of the Top 10 Nightlife Scenes in the nation by US News & World Report.

Enjoy shopping? Visit Rittenhouse Row and shop for clothes and shoes tax-free. With dozens of owner-operated specialty stores and boutiques, you are sure to find something special to remember your stay. Feeling like music? Take your seat for a show at the Kimmel Center, home of the Philadelphia Orchestra, or find some "Philly Soul" or live jazz in the dozens of local clubs. If art is your interest, explore the beloved Philadelphia Museum of Art, or the Mural Arts Program, designed to curb graffiti. This landmark program has funded more than 2,800 murals by professional, staff and volunteer artists while simultaneously educating over 20,000 youth in underserved Philadelphia neighborhoods.

The paths to understanding American history and community all converge in Philadelphia. Where else can you go to rediscover the birthplace of American democracy and at the same time, experience this essential community-focused training event? We look forward to seeing you there!



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

"The paths to understanding American history and community all converge in Philadelphia. Where else can you go to rediscover the birthplace of American democracy and at the same time, experience this essential community-focused training event?"

A handwritten signature in black ink that reads "Marietta Rodriguez".

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JPMORGAN CHASE & CO.



NeighborWorks Training Institute

Feb. 10 - 14, 2025
Philadelphia,
Pennsylvania

#NWTraining

NEIGHBORWORKS COMES TO PHILLY!

Here's what we're doing to maximize your learning, your growth & 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! Plenty of options in our venues and nearby to choose from, so don't fill up on 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 discussion that can enhance your work and your career! Check out the free activities listed on page 21. We look forward to relaxing with you outside of class hours.



We're taking care of your health!

Understanding that COVID is still a reality, we encourage you to test before you leave for the event, and stay home if you feel ill. Should something happen onsite, we've got staff to assist you. And meanwhile, we'll have a variety of fun activities to keep you moving and strong and healthy while you're with us.



And we have more coming...

Lunch is on us for our opening plenary session! Join us to hear about what's happening at this event and 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 City of Brotherly Love!

COURSES OFFERED AT THIS EVENT

			TUITION	MON 10 TUES 11	FEB WED 12	THURS 13 FRI 14
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			
AH134	The Developer’s Tool Kit		\$800			
AH136	Successful Housing Development: Assembling the Best Project Team		\$800			
AH211	How to Maintain Compliance in LIHTC Projects		\$400			
AH221	Rental Housing Development Finance		\$800			
AH226	Creative Project Financing Strategies		\$400			
AH230	Multifamily Clean Energy Investment Playbook NEW!		\$800			
ASSET MANAGEMENT						
AM121	Nuts and Bolts of Asset Management (CHAM)		\$1,200			
AM225	Affordable Housing Finance Workshop for Asset Managers		\$800			
AM290	Asset Management Fundamentals (CHAM)		\$1,200			
AM291	Financial Fundamentals for Asset Managers (CHAM)		\$800			
AM321rq	Advanced Financial Tools for Asset Managers (CHAM)		\$1,200			
AM351rqbl	Advanced Housing Asset Management (CHAM)		\$1,765			
COMMUNITY AND NEIGHBORHOOD REVITALIZATION						
NR104	Getting Things Done in Neighborhoods through Strategic Collaborations		\$800			
NR240	Rethinking Reentry: The Role of Community UPDATED!		\$800			
COMMUNITY ECONOMIC DEVELOPMENT						
ED101sv	Community Economic Development Principles, Practices, and Strategies		\$800			
ED120	Commercial Real Estate Development		\$800			
ED144	Foundations of Microenterprise Development UPDATED!		\$800			
ED165	Achieving Economic Development with CDBG Funding		\$400			
ED230	Growing Microenterprise in Your Community UPDATED!		\$400			
COMMUNITY ENGAGEMENT						
CB107	Community Engagement and Activation Strategies NEW!		\$800			
CB108	The Power of Communication: Talking, Listening and Messaging NEW!		\$800			
CB127	The Role of Women in Transforming Communities UPDATED!		\$400			
CB137	Working in Immigrant Communities NEW!		\$400			
CB235	Community Engagement Leadership and Management UPDATED!		\$800			
CB245	Taking Green Action in Your Community UPDATED!		\$800			
CONSTRUCTION AND REHAB						
CP101	Housing Rehabilitation Design and Construction Basics		\$800			
CP131	Introduction to Factory-Built Housing		\$800			
CP145	Project Management for Construction and Rehab UPDATED!		\$800			
CP153	Basic Blueprint Reading UPDATED!		\$400			
CP181	Housing Production and Risk Management UPDATED!		\$800			
CP255	How to Conduct a Rehab Home Inspection		\$1,200			
FINANCIAL CAPABILITY, HOUSING EDUCATION AND COUNSELING (PRESENTED BY NCHEC)						
HO103	Lending Basics for Homeownership Counselors UPDATED!		\$1,200			
HO105	Compliance with State and Federal Regulations UPDATED!		\$800			
HO109	Foreclosure Basics for Homeownership Counselors UPDATED!		\$800			
HO111	Home Equity Conversion Mortgages		\$2,000			

100 Level Fundamental course		200 Level Intermediate course		300-400 Level Advanced course		TUITION	FEB		
							MON 10 TUES 11	WED 12	THURS 13 FRI 14
FINANCIAL CAPABILITY, HOUSING EDUCATION AND COUNSELING (PRESENTED BY NCHEC)									
HO200	Ready, Set, Prep: Tackling the HUD Counselor Exam Step by Step					\$1,200			
HO208	Building Skills for Financial Confidence					\$800			
HO208b	Building Skills for Financial Confidence					\$800			
HO209	Delivering Effective Financial Capability Programs UPDATED!					\$800			
HO210	Practice, Study, Success: Test Strategies for HUD's Counselor Certification Exam					\$800			
HO211	Credit Counseling for Maximum Results					\$1,200			
HO213	Fair Housing - What Professionals Need to Know UPDATED!					\$400			
HO219	Advancing Homeownership for People of Color					\$800			
HO229	Homebuyer Education Methods: Training the Trainer					\$2,000			
HO247	Post-Purchase Education Methods					\$2,000			
HO248	Cracking the Code: HUD Compliance for Housing Counselors UPDATED!					\$800			
HO250	Homeownership Counseling Certification: Principles, Practices and Techniques, Part I					\$2,000			
HO250b	Homeownership Counseling Certification: Principles, Practices and Techniques, Part I					\$2,000			
HO274	Rental Housing Certification: Part 1 UPDATED!					\$1,200			
HO288	Rental Eviction Intervention Certification: Part 1 UPDATED!					\$1,200			
HO307	Advanced Foreclosure: Case Study Practicum					\$800			
HO310	Financial Coaching: Helping Clients Reach Their Goals UPDATED!					\$800			
HO345	Foreclosure Intervention and Default Counseling Certification, Part I UPDATED!					\$2,000			
HO360	Homeownership Counseling Certification for Program Managers and Executive Directors UPDATED!					\$2,000			
HO370bl	Financial Coaching Advanced Practicum: Taking Your Practice to the Next Level UPDATED!					\$1,365			
HO375	Financial Capability Program Design for Managers					\$800			
HO380	Compliance Check-Up for HUD Housing Counseling Program Managers and Executive Directors UPDATED!					\$1,200			
HO385	Using Trauma-Informed Skills in Financial Coaching					\$800			
HO388	Rental Eviction Intervention Certification Part 2: Program Design and Delivery UPDATED!					\$800			
NONPROFIT MANAGEMENT AND LEADERSHIP									
ML120	Strategic Thinking and Planning					\$800			
ML130	Human Resources Management and Development UPDATED!					\$800			
ML145	ABCs of Managing Projects and Collaborators					\$800			
ML162	Marketing Your Programs and Organizations UPDATED!					\$800			
ML172	Fundamentals of Sustainable Funding: Engaging Individual Donors					\$400			
ML173	Grant Proposal Writing					\$800			
ML210	Operational Strategies for Organizational Success					\$400			
ML240	Board Oversight and Governance UPDATED!					\$800			
ML252	Money and Mission: Linking Assets and Outcomes for Success and Sustainability UPDATED!					\$800			
ML266	Brandraising: Raising Money and Visibility Using Smart Communications UPDATED!					\$400			
ML280	Coaching Skills for Managers UPDATED!					\$800			
ML283	Advanced Negotiation: Mastering Difficult Conversations					\$800			
ML284	Influence Without Authority: Persuasion Skills You Never Knew You Had!					\$400			
ML315	Leading Breakthrough Strategy					\$800			
ML316	Leading High Performance Teams					\$400			
SINGLE-FAMILY AND SMALL BUSINESS LENDING									
LE141	Fundamentals of Micro and Small Business Underwriting					\$800			



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/phillynti2025>

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 projects or programs. 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.cham.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 for use by subrecipients are. 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 financial terms and fundamental principles of how to finance a project. 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.

The 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 *AH221: Rental Housing Development Finance* 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, there may be a loaner available for your use.

AH134 The Developer's Tool Kit

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

AH136 Successful Housing Development: Assembling the Best Project Team

Architects, general contractors, development consultants, project managers, property managers, engineers, realtors, appraisers, accountants, attorneys...Who do you need on your development team? Who don't you need? How does a team change for different kinds of projects? In this practical course, nonprofit housing staff and board members will develop the skills to define and assemble a strong, effective development team for a successful project. You'll learn when to engage your board in real estate ventures, how to prepare successful Requests for Qualifications or Proposals for third-party team members and multiple ways to identify contractors and other professionals. You'll know the pros and cons of having in-house development staff versus working with consultants. And once your team is in place, you'll have tools and techniques to manage everyone and keep your project on track throughout its development.

AH211 How to Maintain Compliance in LIHTC Projects

This course goes beyond the day-to-day compliance needs of property management and covers the variety of responsibilities the General Partner has for maintaining compliance through the life of the property. These responsibilities include fulfilling program obligations to the IRS and the State Tax Credit Allocation agency, managing resident selection, income certification and rent limits, and understanding the Partnership Agreement and the financial and reporting needs of the Limited Partner. Starting with an overview of how the Low Income Housing Tax Credit (LIHTC) program works, this class provides participants an opportunity to discuss what happens after the credits are awarded.



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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. 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 might be available for your use.

AH226 Creative Project Financing Strategies

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

AH230 Multifamily Clean Energy Investment Playbook

According to the Environmental Protection Agency, 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. This includes incentives for solar and storage, building electrification and other efficiency measures to help build out low- to no-emission homes.

Utilizing federal tax credits and funding as well as other federal, state, and local resources the incentive for multifamily developers to “go green” has never been clearer. Join us and take advantage of this comprehensive opportunity to examine the scoping, funding and staffing of climate-conscious multifamily housing, as well as how to mitigate risk.

ASSET MANAGEMENT

AM121 Nuts and Bolts of Asset Management (CHAM)

This interactive and engaging course is 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.

AM225 Affordable Housing Finance Workshop for Asset Managers

This highly interactive course is based on a case study using an interconnected Microsoft Excel spreadsheet to develop a financing plan for a prototype new construction affordable housing property. Join us and you'll learn to:

- ▶ Coordinate or participate in the development of a development financing plan, including creation of a proforma and construction budget (sources/uses).
- ▶ Research and determine maximum rents and incomes from online HUD databases;
- ▶ Estimate post-development operating budgets through comparable analysis.
- ▶ Determine the debt capacity of a project through the projected post-development operating budget.
- ▶ Solve for various intermediate/complex financial functions in Excel, including amortization tables, future value and present value analysis and payment calculations.
- ▶ Solve for tax credit payout yield.



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AM290 Asset Management Fundamentals (CHAM)

This course is designed to further acquaint the affordable housing practitioner with the concepts and strategies of sound asset management. It is a major building block in the CHAM® curriculum. It combines interactive lectures, in-class exercises, case studies and outside-class homework assignments. This class includes a test, successful completion of which is required for those pursuing the Asset Management Specialist (AMS) and CHAM designations. *AM290 Asset Management Fundamentals* and *AM291 Financial Fundamentals for Asset Managers* are recommended, but not required, to be taken sequentially during the same week. *AM121 The Nuts and Bolts of Asset Management*, a class on asset management fundamentals offered regularly at the NeighborWorks Training Institute (NTI), is a prerequisite.

AM291 Financial Fundamentals for Asset Managers (CHAM)

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

AM321rq Advanced Financial Tools for Asset Managers (CHAM)

This advanced course is 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. You'll need to bring a laptop running Excel; and it is assumed that all participants will be comfortable creating and working with Excel spreadsheets.

AM351rq Advanced Housing Asset Management (CHAM)

This is the final course needed to earn the Certified Housing Asset Manager (CHAM) 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, you'll explore techniques for analyzing and managing portfolios of properties through exercises involving both case studies and analysis of your own organizations' portfolios. You'll need to bring a laptop and will be sent materials to prepare a few weeks in advance.

In Part II, you'll prepare an asset management plan for one of your properties that will be analyzed and presented in the context of your 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 asset management 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 BUILDING AND ENGAGEMENT

CB107 Community Engagement and Activation Strategies

What does it take to engage and activate residents in meaningful ways? This foundational course provides effective strategies and tools to understand how various engagement and activation strategies strengthen communities.

Join us and learn to identify personal and societal factors that support and hinder community engagement and activation efforts. Through interactive activities, you'll recognize the power dynamics influenced by privilege and discrimination in the community and the decision-making structures that impact it. Using the asset-based community development approach, we'll explore how to engage and activate communities through partnerships, coalitions, and collaborations. The course will help you understand the role of accountability in building trust for community engagement and activation. You will leave the class with a solid plan to strengthen your current community efforts.



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CB108 The Power of Communication: Talking, Listening and Messaging

Have you ever noticed two people saying almost the same thing, but somehow others only remember that one person said it? That's because there's power in how we communicate. Our words and our actions can influence others intentionally and without our even realizing it.

This exciting course explores how what we say is as important as how we say it. We'll think about how community dynamics, stereotypes and our own individual biases impact what we pay attention to and how we speak. Then we'll learn about different communication tools we can use with different groups and in different places. Since it's important that we're intentional about how we show up with residents and community members, we'll practice tools like active listening, group facilitation skills, meeting new people and talking to groups.

CB127 The Role of Women in Transforming Communities

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

CB137 Working in Immigrant Communities

Immigration has always been a hotly contested issue throughout the history of the United States. Often controversies surrounding immigration are based on myths and misconceptions. This introductory course explores the complexities of immigration, including why people immigrate to the U.S., the history of U.S.-bound immigration, the demographic significance of the foreign-born, their settlement patterns and what happens after they arrive – the changing relations between newcomers and established residents in local communities. We'll tackle some of the most common myths and misconceptions about immigration and equip participants with sound conceptual frameworks, reliable data and information and place-based engagement activities that will help community development professionals working in immigrant communities strengthen relationships between newcomers and established residents. Understanding this background is a key part of effective community engagement and revitalization efforts. Furthermore, working with and in immigrant communities is a key factor for many organizations seeking to embed Race, Equity, Diversity, and Inclusion (REDI) in their programs.

CB235 Community Engagement Leadership and Management

Community engagement managers have a unique set of challenges. Leadership, initiative and the ability to build internal partnerships are critical. Accountability and outcome measurement can be less than straightforward. Convincing organizational leadership of the value added or return on investment requires skillful “managing up,” and building internal and external organizational alliances is critical to strategic positioning. In this session, you will learn techniques for addressing each of these challenges. Through interactive exercises and sharing of experiences, you'll explore strategies to find the best fit for your organization and its circumstances. This class is for senior community engagement professionals and anyone who manages community engagement programs and is seeking to optimize resources for maximum and sustainable impact.

CB245 Taking Green Action in Your Community

Would you like to help your community become more environmentally sustainable? This course will give you four tools you can take home to promote green in your community: community planning and design, issue-based organizing and advocacy, education and social marketing and neighborhood self-management. We'll apply these tools to a variety of real-life sustainable development challenges – including transportation, “greener” housing, creating community green spaces, reducing pollution and more. You'll learn how to measure your community's progress toward becoming more sustainable and explore how promoting sustainability can help you address other key community development issues. The course includes extensive case exercises and the opportunity to work with others to research and develop strategies for the sustainable development challenges most important to you.

COMMUNITY ECONOMIC DEVELOPMENT

ED101 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 learn about 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 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 critical discussion about economic development projects.



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ED120 Commercial Real Estate Development

This course provides a solid exploration of commercial real estate development, including supermarket and shopping center development and recent efforts to improve access to healthy food in low-wealth communities. We will examine the factors that inhibit retail development in underserved communities and explore the roles that CDCs and public entities can play in encouraging private sector development (as well as undertaking development themselves). Participants will review the role that real estate development plays in community economic development and become familiar with a variety of project types, the real estate development process and the key players on a development team. We will explore the fundamentals of market analysis, the factors affecting demand for retail and office space and the types of leases used in commercial development. Participants will learn the basics of how to evaluate the feasibility of a project and also learn how the value of commercial property is determined. We will evaluate real estate projects from the perspectives of private and public-sector lenders, estimate the amount of debt a project will support and explore ways to close financing gaps. Several project case studies will be used throughout the course, and you will perform a series of analytical exercises. Participants should bring a calculator.

ED144 Foundations of Microenterprise Development

What is a microenterprise, and how do we support their development in our community? This course will explore the field of microenterprise development and give you the foundational skills and tools necessary to assist microenterprises that are in the planning to start-up phase of business. In addition to discussing the three basic elements of a good microenterprise development program—training, technical assistance and micro-lending—you will have the opportunity to evaluate sample business plans and see what characteristics make for a strong and successful business plan and operation. The course will also include a discussion of the components of capacity building, the essential resources necessary for a successful microenterprise program as well as development of program design tools, outcomes and program assessment tools.



ED165 Achieving Economic Development with CDBG Funding

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

ED230 Growing Microenterprise in Your Community

There are currently 25.5 million microbusinesses, representing 92% of all businesses in the United States. For women, people of color, and low-income populations, launching a microbusiness is particularly appealing since there are low barriers to entry and starting a business is another way to generate income and assets. One of the greatest challenges in the industry is figuring out why some microbusinesses thrive and others do not. This course will focus on external client needs and look at the essential components of a microbusiness. We'll explore the phases of growth for a microbusiness, organizational capacity and potential financial vulnerabilities of your microbusiness, as well as how to provide potential owners a situational analysis and financial planning primer.

COMMUNITY AND NEIGHBORHOOD REVITALIZATION

NR104 Getting Things Done in Neighborhoods through Strategic Collaborations

In today's world, resources — time, energy, and money — are carefully allocated. Revitalization collaborations that combine effective strategy with efficient use of resources will be the most successful. Creating partnerships also helps ensure that revitalization will be sustained in the long run. Learn how to cultivate long-term relationships that help you continue to create win-win opportunities for neighborhood collaborations. In this intensive course, you'll analyze why some partnerships succeed and some fail, and what each sector can bring to the table that others cannot. This course explores how thinking "out of the box" can create maximum rewards for all as you implement your revitalization strategy.



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/phillynti2025>

NR240 Rethinking Reentry: The Role of Community

At least 95% of people incarcerated in state prisons will be released back to their communities at some point. In 2015 alone, 641,100 people who had been sentenced to state and federal prisons reentered communities across the nation. Rethinking Reentry presents community development practitioners with practical approaches to implementing effective pre- and post-release strategies. We'll examine reentry from the perspectives of returning citizens, their families and various stakeholders throughout the justice system process. We'll also examine the relationship between race, crime and the criminal justice system, with particular attention given to institutional barriers involving race, gender and social class, as well as bias in the criminal justice system related to arrests, sentencing and incarceration. The class is a unique opportunity to share, learn and reflect with peers about this critical social issue and community development challenge.

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 the latest, most effective and efficient rehab practices? This is the entry course that will provide you the crucial foundation you need to effectively communicate with program applicants, property owners, designers and contractors involved in your projects.

You'll learn terminology of the trade, 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.



CP131 Introduction to Factory-Built Housing

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

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

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

CP145 Project Management for Construction and Rehab

Can you identify the stages of project management and the tasks that are associated with each stage? Do you know the logical sequence of the tasks and their duration? Who should be a part of an effective project management team and what role does each member play? Are there project management tools that don't cost an arm and a leg? Come discover the answers to these questions and the keys to successful project management. We will also explore the components of a quality project schedule and determine how the effective management of the schedule will help us deliver the project on time, on budget, and to the quality standards we expect. In this course we will build your overall knowledge of what goes into successful project management and how you can return to your organization and immediately begin implementing your new skills.

CP153 Basic Blueprint Reading

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



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CP181 Housing Production and Risk Management

This course prepares rehab specialists, project managers, executive directors and board members for success in production management. You'll learn the various models of production, ranging from full architecture services to emergency repairs. Together, we'll examine the three prime subsystems of all production management systems: risk control, financial control and time and team management. You'll gain skills in evaluating various programs that can help build and maintain efficiency. The course is recommended as an introduction for rehab specialists and project managers or a solid overview course for executive directors and board members.

CP255 How to Conduct a Rehab Home Inspection

Whether owner-occupied or acquisition rehab, this advanced course will equip housing rehabilitation, construction, and development program staff with the skills needed to conduct a thorough, effective and efficient inspection of a home. The course focuses on the process of inspections for the sake of determining feasibility and creating a scope of work for contractors. You will learn the skills to properly conduct an inspection, including inspection challenges, the inspection process and routine, inspection forms, necessary inspection tools, and how you should look, act and interact with the public. You will learn what items and systems you should be investigating and how to do a visual, non-invasive home inspection. In addition, the course will feature an interactive inspection process to help develop your skills. Attend this course and walk away with the essential skills and knowledge to conduct one of the most critical processes handled by rehab/construction specialists.

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 include loan origination, processing, underwriting, closing and servicing. Conventional and FHA loan products are described, along with practical discussions on credit scoring, appraisals, subprime and predatory lending. You'll learn how to prequalify potential borrowers, including calculating loan amounts and monthly mortgage payments. This 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. Violations of these federal laws and how to develop controls to ensure compliance are discussed, as is how state regulations affect community lending. Participants will also examine the influence of non-federal requirements on local lending activity, including state regulations and licensing requirements, and learn about successful efforts to reduce restrictive regulations by states.

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, and obligations found in loan documents.

One year of general homeownership counseling experience is recommended prior to taking this course. The class satisfies Part II of the requirements for the certification in one-on-one homeownership counseling. Part I is satisfied through H0250, Homeownership Counseling Certification: Principles, Practices, & Techniques.





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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 and 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 H0104e 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 included in the HUD Housing Counseling Exam, including financial management, housing affordability, homeownership, avoiding foreclosure, tenancy and fair housing. We'll tackle the HUD study guide step by step and provide tools and relevant activities to help you master and memorize content before taking the exam. We suggest pairing this course with Practice, Study, Success: Test Strategies for HUD's Counselor Certification Exam (H0210), which is designed to help you with practical study and test-taking skills.

H0208 Building Skills for Financial Confidence

Are you wondering what skills are necessary for practitioners to effectively work with customers in reaching their financial goals? What behaviors and attitudes can make a person financially confident? What barriers do 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 will learn how to facilitate engaging and candid conversations around using appropriate financial products and services, spending, saving, credit, protecting assets and maximizing income. Develop and build your skills in key content areas that will help consumers put themselves in a better position to withstand economic stresses and achieve financial prosperity. Who should attend: financial coaches, financial and housing counselors, program managers, rental housing counselors and community development professionals.

H0209 Delivering Effective Financial Capability Programs

In this course, you'll build the skills needed for delivering effective financial capability programs. The purpose of financial capability programs is to build customers' capacity – based on knowledge, skills and access – to manage financial resources prudently and effectively, so that they reach their financial goals and build financial health. Applicable across a range of financial capability programs, this course focuses on how to deliver programs and services that work. It includes current practices and tools to support customers' journeys in the program from pre- to post-service delivery. You and your peers will learn how to better understand your customers. In turn, you'll increase your ability to engage customers in the program, deliver tailored services that meet customers' needs and keep customers motivated to change behaviors and reach goals over the course of the program.

H0210 Practice, Study, Success: Test Strategies for HUD's Counselor Certification Exam

Freaked out at the thought of taking the HUD Counselor Certification Exam? We hear you, and you are not alone! Conquer your exam anxieties and prepare to rock the HUD Housing Counselor Certification Exam!

Join us for this new 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 this exam. Practice sample test questions and learn strategies with your peers as you prepare to cram for this exam. Learn time management techniques and a variety of methods to recall information for successful results. Note: this course focuses on testing strategies and practice. Our newly updated and expanded H0200: Ready, Set, Prep: Tackling the HUD Counselor Exam Step by Step course is recommended as a companion course to help you master the content of the 6 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 at overcoming challenges in past behaviors and helping clients build positive credit profiles. This course is a must for the new or experienced counselor who is looking for tools to make credit counseling sessions more structured, efficient and productive.



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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.

H0219 Advancing Homeownership for People of Color

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

H0229 Homebuyer Education Methods: Training the Trainer

This pre-purchase homeownership education course is designed to teach you 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. You'll also learn to use the best materials and methods to train homebuyers on how to assess readiness, shop for a home, get a mortgage loan, improve their budget and credit profiles and maintain their home and finances after purchase. Participants will engage in hands-on activities that will help them improve their facilitation skills and deliver interactive training sessions based on effective adult education methodology.

Participants should be familiar with mortgage industry terminology and processes prior to taking this class. Lending Basics (JO103) can be taken as a prerequisite should you need to build your knowledge in this area. This course certifies you in homebuyer education delivery, and a post-course exam is required for all participants.

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 prior to taking this course. An exam is given following the course for those interested in obtaining a Certificate of Professional Recognition in post-purchase education training.

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 provides resources and checklists for working with clients, maintaining 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

Through practical applications, this course equips counselors with the necessary skills, procedures and subject matter expertise to assist new homeowners in achieving success. Participants will gain the skills to conduct personalized counseling sessions that address money management systems, savings, credit history and debt obstacles to homeownership. Additionally, you will learn how to utilize state-of-the-art industry tools, techniques and resources to practice various counseling activities, including mortgage readiness and housing affordability assessment, standardized income calculations and action plan development. The course includes requirements for housing counseling mechanics such as file management, codes of conduct and operational guidelines for HUD and the National Industry Standards for Homeownership Education and Counseling. 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. To obtain full certification in pre-purchase homeownership counseling, it is necessary to complete both this course and the Foreclosure Basics course (H0109 or H0109el) and successfully pass the corresponding exam(s).



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H0274 Rental Housing Counseling Certification: Part 1

This course is designed to provide housing counselors with a comprehensive understanding of all aspects of rental housing counseling. You'll 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 provides 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 give you an opportunity to learn through a variety of methods, including working with a Rental Counseling Process Model and hands-on experience with case study examples.

Full certification in rental housing counseling is achieved by completing both this course and the Building Skills for Financial Confidence Course H0208 and passing the exams.

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 and national economic events. How can organizations prepare for a rise in rental evictions, and what skills do housing counselors need to help clients avoid rental evictions and reduce the negative impacts that result from rental evictions?

This course will provide you with the knowledge, skills, and tools to be effective in working with renters in crisis, navigating the local rental eviction process and collaborating with landlords, courts and other social service providers. By the end of this course, you will be equipped to better support clients in preventing rental evictions and reducing harm when rental evictions cannot be prevented.

There is an exam with this course and participants must pass the exam with a minimum of 80%.



H0307 Advanced Foreclosure: Case Study Practicum

This course focuses on the critical skill sets that foreclosure intervention counselors need to have. It is designed to address and provide hands-on practice in four content areas, including core counseling 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.

This course satisfies Part II of the training requirements for the Foreclosure Intervention and Default Counseling Certification, Part I program.

H0310 Financial Coaching: Helping Clients Reach Their Goals

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

H0345 Foreclosure Intervention and Default Counseling Certification, Part I

This advanced five-day course is designed for counselors with one or more years of experience providing one-on-one foreclosure intervention and default counseling. This 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 H0109e1) first, which will give you a foundation for the advanced content of this course. Part II requires completion of Advanced Foreclosure: Case Study Practicum (H0307 or H0307vc).



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H0360 Homeownership Counseling Certification for Program Managers and Executive Directors

This course is designed for professionals in the homeownership counseling field who are working at the management level. Through hands-on application you'll learn procedures and methodology that will better equip you to 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 performance standards, HUD, National Industry Standards, fair housing, ethics, compliance, pipeline review and reporting is included.

H0370bi Next-Level Financial Coaching: Furthering Your Practice

This highly interactive course is designed for financial coaches looking to further develop their skill set 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), participants practice coaching skills aimed at helping clients with cash flow, savings, reducing debt, rebuilding credit and protecting their assets. The course is led 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).

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 can 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, participants will walk away with a roadmap and tools to put their program together from enrollment to outcomes measurement.

H0380 Compliance Check-Up for HUD Housing Counseling Program Managers and Executive Directors

Are you managing a HUD-approved agency and want to be sure you're ready for your next HUD audit? Do you feel like you have it all under control but would like tips and tools to help you streamline compliance? Then this course is for you!

The class gives you resources and checklists for managing housing counseling and education staff, tracking counseling time in the Personnel Activity Report, performing file audits and reporting outcomes that accurately reflect the impact of the work your organization does. We'll review HUD programs, discuss ways your organization can affirmatively further fair housing, take a detailed look at the HUD 9902 report and get you ready for your next HUD audit.

If you are responsible for managing a HUD-approved housing counseling program, or you want to learn more about what it takes to be a HUD-approved agency, join us and learn all you need to help you standardize and streamline the housing counseling process.

H0385 Using Trauma-Informed Skills in Financial Coaching

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





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H0388 Rental Eviction Intervention Certification Part 2: Program Design and Delivery

Rental eviction intervention programs are designed to help clients avoid evictions and minimize harm when rental evictions cannot be prevented. A range of program models exist that build on an organization's capacity and meet the local community's needs. Common components, offered holistically by one organization or via partnerships with multiple entities, include outreach, counseling or coaching, financial assistance, legal services and wraparound services. In this program design course, you'll explore different program models and best practices for offering eviction intervention services that suit local needs. You and your peers will examine your organizations' capacity and identify how you will conduct outreach, develop partnerships, track outcomes and plan for sustainability. The course 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. Learners must take Rental Eviction Intervention Certification Part 1 (H0288) for complete certification.

SINGLE-FAMILY AND SMALL BUSINESS LENDING

LE141 Fundamentals of Micro- and Small Business Underwriting

This course is designed to give all lending practitioners a strong foundation in the underwriting of micro- and small businesses, whether they have little or no experience or would like a refresher. You'll learn and employ the analysis techniques of finance professionals—the five Cs of credit. You'll also analyze financial statements and other types of financial information using a variety of commonly used financial ratios and will discuss both the benefits and limitations of these methods. You and your peers will 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 others in the nonprofit sector.



NONPROFIT MANAGEMENT AND LEADERSHIP

ML120 Strategic Thinking and Planning

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

ML130 Human Resources Management and Development

This course provides a framework for understanding and thinking strategically about employment relations and the management and development of staff. Specific topics include:

- ▶ Recruitment.
- ▶ Interviewing and hiring.
- ▶ Labor laws.
- ▶ Performance evaluation, compensation and benefits.
- ▶ Promotion.
- ▶ Job design.
- ▶ Staff development and training.
- ▶ Retention and turnover.
- ▶ Leadership succession planning.

This intensive course is designed for Human Resources professionals as well as executives, directors, managers and others who are key to understanding the most important assets to any organization: the people.

ML145 ABCs of Managing Projects and Collaborators

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



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ML162 Marketing Your Programs and Organization

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

ML172 Fundamentals of Sustainable Funding: Engaging Individual Donors

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

ML173 Grant Proposal Writing

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

ML210 Operational Strategies for Organizational Success

Community-focused organizations are expected to operate as efficiently as possible while simultaneously generating measurable outputs, outcomes, and impacts. Join us for this interactive course, where we will gain tools for understanding and contextualizing your organization's operations, management roles, responsibilities and relationships and methods for establishing, managing, and streamlining processes and procedures. Develop tactics for practical planning and execution, including forecasting metrics to reflect needs and results. Explore best practices in both creating and enhancing quality assurance systems and instituting a culture and process for continuing improvement. This course is ideal for EDs, CFOs, COOs and any managers who supervise staff.

ML240 Board Oversight and Governance

This comprehensive course is targeted to both new and experienced board members. Working together with your peers in an interactive approach to learning, novices and seasoned board members will walk away with valuable new tools and approaches to perform as outstanding board members.

In this course you will learn:

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

ML252 Money and Mission: Linking Assets and Outcomes for Success and Sustainability

This practical, hands-on course offers the models, skills, and strategies for successfully developing and leveraging an organization's financial structure and processes in ways that ensure advancement of the organization's mission, and ultimately, community benefit. The seminar focuses on developing fiduciary understanding, linking asset acquisition and investment to programmatic outcomes, building strategic financial structures and processes, and using financial reporting and communication as a strategic assessment and engagement tool.





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/phillynti2025>

ML266 Brandraising: Raising Money and Visibility Using Smart Communications

As you expand the tools you use to communicate, and as staff roles change, how do you ensure you're all speaking with one voice? Based on Sarah Durham's book *Brandraising: How Nonprofits Raise Visibility and Money Through Smart Communications* (Jossey-Bass/Wiley, 2010), this intermediate-level course will challenge you to think about what's unique about your organization. You'll learn about ways to create a compelling brand that expresses the positioning and personality of your organization, attracts the right people, and helps you think of ways to use your brand to take your organization to the next level. In addition to using case studies and participatory exercises, we'll work in small teams to review and critique your organization's communications, evaluate whether your current brand is doing all it can for you and share ideas for how you should prioritize any changes you might make. Bring those logos and taglines, promotional materials and brochures, website pages and social media campaigns, and anything else you'd like the group to share and discuss.

This course is ideal for

- ▶ Communications or development directors or managers
- ▶ Executive directors and board members
- ▶ Organizations with some communications knowledge, who are looking to take their brand to the next level
- ▶ Organizations hoping to stand out in their community more than they currently do.

ML280 Coaching Skills for Managers

Coaching those we manage is a key element of leadership. It can help you develop a better relationship with your team, resulting in higher productivity and greater morale. Beyond simply managing, coaching your team can help them better fulfill their potential and enhance the skills they have. Why coach? Because it works! Listening actively, offering acknowledgment and respect, ensuring confidentiality, asking questions that encourage deeper thinking, and facilitating SMART goal-setting can add up to a lot.

Here are some outcomes you can anticipate when you participate:

- ▶ Strengthened relationships with your people, and strengthened relationships between team members.
- ▶ A foundation for greater trust.
- ▶ More open communications.
- ▶ Increased initiative.
- ▶ Meaningful engagement with the work and the business.
- ▶ Greater accountability.
- ▶ Enhanced team performance.
- ▶ Enhanced recognition of underlying issues and ability to resolve them before they become serious.

ML283 Advanced Negotiation: Mastering Difficult Conversations

This course builds on the foundational skills and frameworks introduced in *How to Negotiate: The Most Important Skill You Will Ever Learn!* (ML282). The class offers helpful advice, tools and additional frameworks designed to address the most difficult negotiators, complex scenarios and challenging tactics. Many negotiators believe they should be "difficult" in a negotiation by utilizing manipulative tactics to throw the other side off balance in order to "win" the negotiation. Rather than respond in kind and degenerate the negotiation, it is important to understand your own triggers and prepare to engage and educate the other side about the benefits of collaboration, bringing them on board with a more productive approach that has been proven to better meet the needs of all parties over the long-term.

ML284 Influence Without Authority: Persuasion Skills You Never Knew You Had!

In this course, you'll discover how to influence, motivate and lead individuals and teams to resolve issues and meet project goals efficiently, effectively and collaboratively. The 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 will look at proven tools and frameworks including relationship mapping, the ladder of understanding and knowing your influence currencies as well as theirs. This highly interactive course will assist you in creating a personal action plan to implement when you return home.





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/phillynti2025>

ML315 Leading Breakthrough Strategy

The ultimate leadership challenge is transformational change – leading a breakthrough. This requires a commitment from a leader who initiates the change as well as the efforts of a collection of others who are similarly committed. Whether you are leading an organization from good to excellent or leading through a crisis, this advanced course will provide you with tools for understanding the comprehensive process of organizational transformation. Topics include vision and strategy development, mission analysis, stretch goals, dynamics of organizational performance and strategy implementation. Participants will gain the tools for designing all of these activities within their organizations, and a tailor-made plan to begin the overall process. This course is ideal for executive directors, board members and other organizational leaders who are committed to making a breakthrough impact on their communities by transforming their organizations.

ML316 Leading High-Performance Teams

No matter how brilliant your strategy or plan is, you don't stand a chance of success unless you can mobilize a team to execute at a high level. Much is required to make this happen, and it begins with self-awareness of your leadership style and how you can most effectively engage with others of the same or different styles. It includes understanding the dynamics of a high-performing team and how you can build that. Central to this is the level of trust and respect that others have for you. Finally, it includes understanding how to develop your team members to their greatest potential. In this advanced course, you will gain insights into your leadership style, understand more clearly how to interact with others, learn about the cognitive biases that can derail all of us when it comes to being an ethical leader and explore strategies for developing your team most effectively. This course is ideal for executive directors, board members and other organizational leaders who are committed to making a difference in their communities and organizations.



PEER LEARNING, NETWORKING, AND INSTITUTE AFTER HOURS!

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: Breakfast Break	
8:30am - 9:45am	Class
9:45am - 10:30am: Mid-Morning Break	
10:30am - 11:30am	Class
11:30am - 1:00pm	Lunch
1:00pm - 2:15pm	Class
2:15pm - 3:00pm: Mid-Morning Break	
3:00pm - 4:00pm	Class
4:00pm - 4:30pm	Break
4:30pm - 6:00pm: Afternoon Workshops and Other Activities (Optional)	

Afternoon Workshops

Join a session to learn about timely topics and new programs and services available in our field. You'll have the opportunity to talk to experts, partners and funders, and meet fellow participants as well.

Masterpieces and Mocktails: A NeighborWorks twist on a paint-and-sip!

Unleash your creativity at our pain-and-sip session featuring a delightful twist on non-alcoholic beverages! Join us for an evening of artistic expression, relaxation, and fun. Sip on refreshing mocktails as you use your creative free hand to produce a masterpiece. Seasoned or novice level, all are welcome – this inclusive event is perfect for all skill levels. The event will provide a structured yet flexible experience with clear instructions and allowing you to engage at your own pace. There will be accommodations for different sensory preferences, such as alternatives to certain materials, ensuring that all participants feel comfortable and can fully enjoy the creative process. **WHAT TO EXPECT:** Up-tempo and low-tempo music, meeting room lighting, light conversation with your colleagues and friends at work tables.

Mingle and Dance

Come show off your dance moves at this energy-burning happy hour. We will provide snacks and a signature non-alcoholic mocktail while supplies last. (A cash bar will be available to purchase additional drinks.) You will provide the fun! This is a fantastic opportunity to get your heart pumping before you venture out for dinner. Volume levels will be monitored to ensure a stimulating but not overwhelming balance. Clear instructions and visual cues will be available to guide participants for line dancing during the event, allowing you to engage at your own pace and choose the level of interaction that feels most comfortable. **WHAT TO EXPECT:** Low lighting, colorful lights, up-tempo music, close interaction with your fellow participants.

We're planning additional fun activities, workshops and other opportunities to connect with fellow learners – so be on the lookout in Philadelphia for sessions to inspire and energize you, and bring your professional learning experience to life!



More details onsite, and more activities to come! We recommend registering in advance on the event platform, but some activities will have openings there in Philadelphia.

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/phillynti2025> by Friday, January 17, 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 January 17, 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 January 29, 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 January 17, 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 Friday, January 17, 2025. Cancellations after January 17, 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 1p.m. To earn a certificate you must attend 100% of the course, so book your return flight accordingly.

HEALTH, SAFETY AND EVENT CONDUCT

NeighborWorks staff and event vendors are on hand to ensure the comfort and safety of all event participants. Participants assume all risks related to event participation, including anything related to COVID-19 and will be asked to agree to health, safety and code of conduct protocols at the time of registration. Participants who do not adhere to protocols will be asked to leave the event with no refund.

Please visit [the event resources page](#) for details on the event policies and liability waivers, Code of Conduct, COVID-19 Policy, FAQs, Travel and Safety Tips, and other helpful information.

PHOTOGRAPHY AND SHARING OF PERSONAL INFORMATION

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



KEY EVENT DEADLINES:

- January 17, 2025: Registration Deadline for in-person event
- January 17, 2025: Last day to make course changes for the in-person event
- January 17, 2025: Recommended last day to cancel from the event if your plans have changed

Join us Jan. 29 from 12:30-1:30 p.m. (ET) for an engaging Open House session that sets the stage for what's to come at the NTI in Philadelphia!

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/phillynti2025

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 and to discover new approaches to improving the lives of your community residents, plan to join us for these exciting events. You'll go home with guidance from experts, updated strategies, and the inspiration and peer contacts to put it all to work.

VIRTUAL TRAINING INSTITUTE

May 12-23, 2025

Choose from over 70 webinars, one-week workshops and multi-week faculty-led courses - with no travel budget required and in the comfort and convenience of your home or office.

NEIGHBORWORKS TRAINING INSTITUTE

New Orleans, LA (Aug 25-29, 2025).

You'll find more than 70 in-person courses of 1-5 days, plus:

- ▶ Workshops on the latest industry trends and topics
- ▶ A timely, deep-dive symposium on a major community development topic
- ▶ Regional meet-ups and other activities that facilitate connection with your peers and friends
- ▶ Additional opportunities for professional and personal growth
- ▶ All the fun you'd expect from a week of N'Awlins sights, culture and dining!

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

THE community

A **NeighborWorks**[®] Podcast
AMERICA

EFFECT

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BLUEPRINT
TO SUSTAINABLE &
THRIVING COMMUNITIES.

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Hosted By:
Marietta Rodriguez

President & CEO
NeighborWorks America

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