

# NTI

## NEIGHBORWORKS TRAINING INSTITUTE PITTSBURGH, PA • AUG 26 – 30, 2024



### A FULL WEEK OF PROFESSIONAL LEARNING

#### COMPLETE WITH:

- ▶ More than 85 cutting-edge courses, many new or updated
- ▶ A myriad of networking, peer learning and personal development sessions

A SPECIAL WEDNESDAY SYMPOSIUM  
SY904 SYMPOSIUM 45 & FORWARD:  
Readying Our Field for the Future

NeighborWorks®  
AMERICA

45 YEARS



# WELCOME TO PITTSBURGH

**WE'RE EXCITED TO WELCOME YOU TO THE PITTSBURGH NEIGHBORWORKS TRAINING INSTITUTE (NTI)**, where together, we'll travel through time! This very special event marks the culmination of NeighborWorks America's 45th anniversary – and the setting for this NTI is Pittsburgh, where the NeighborWorks story began with Dorothy Mae Richardson's passionate belief in the power of resident voice. While we honor our collective past, and 45 years of inspiring and impactful work, we'll also look ahead to a future filled with new challenges and opportunities. How will we harness the power of AI? How will we transform our work through the talent of new generations of staff and residents? How will we manage the ups and downs of housing inventory and the rental market? Now is the time to reflect on the lessons of the past and strategize for what lies ahead. Luckily, we are not alone on this journey of growth and change!

At this event, we'll offer more than 85 courses for all levels of experience – many new or updated – so you can build a customized week of learning.

In addition, we're excited to offer a future-focused Wednesday symposium – **45 & Forward: Readyng Our Field for the Future** – in which participants will gain the tools and inspiration to navigate the future. Together with peers and colleagues, we'll gain bold insights into the future of community, and dialogue with cross-sector experts to understand how we can best adapt to stay relevant and responsive to community needs.

Beyond the course hours, you'll have opportunities to network with peers and experience roundtable discussions, workshops and other personal and professional development offerings – including our first-ever Tech Showcase, which will allow you to learn first-hand about the tools and technology that will shape and support the work of your organization. Be sure to participate in as many of these free sessions as you can – the time and energy you invest can provide transformative change for your future!

Over the years, our host city has dramatically reinvented itself, and is now known for its vibrant, thriving community life. Take some time to explore the city's neighborhoods: Walk across the Smithfield Street bridge and take the Monongahela Incline to the top of Mount Washington for breathtaking views. While you're there, check out the shops and restaurants along Shiloh Street. Visit the Strip District, a historic market area with grocers, art studios, boutiques, some of Pittsburgh's best restaurants and sports merchandise. For more shops and dining, visit Lawrenceville or the South Side. And be sure to see the North Side, where Dorothy Richardson did her important work. Today the neighborhood includes beautifully restored row houses dotted with museums and restaurants.

We hope you find the setting for this NTI, and the 45 years of dedicated work leading up to such a full week, as inspiring as we at NeighborWorks do. The combination of Dorothy Richardson's strength and tenacity and the new knowledge and tools you'll gain in Pittsburgh should position you and your organization for great things ahead.



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

**“This very special event marks the culmination of NeighborWorks America’s 45th anniversary – and the setting for this NTI is Pittsburgh, where the NeighborWorks story began with Dorothy Mae Richardson’s passionate belief in the power of resident voice”**

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

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## THANKS TO OUR SUPPORTERS

JPMORGAN CHASE & CO.



 Truist Foundation



# NEIGHBORWORKS COMES TO THE ‘BURGH!

**This NTI will be a very special event – one you can’t miss. Here’s what we’re doing to maximize your learning, your growth and your fun!**



## **We’re keeping you energized!**

We’ll keep the beverages flowing – two beverage breaks in the morning and one in the afternoon. In addition, late morning and afternoon breaks will include to-go snacks! 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 pages 24-25. We look forward to relaxing with you outside of class hours.



## **We’re celebrating!**

This NTI marks the 45th anniversary of the NeighborWorks story. Be sure to celebrate with us! We’re putting you in touch with tech. At this event, we’ll host our first-ever Tech Showcase. You’ll have the opportunity to see and learn about the latest technology up close – and we invite you to imagine how it can help your organization.



## **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 – and of course lovely summer weather – 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 Steel City!**



# COURSES OFFERED AT THIS EVENT

			AUG			
			MON 26	WED 28	THURS 29	FRI 30
			TUES 27			
			TUITION			
<b>AFFORDABLE HOUSING</b>						
AH101	The Fundamentals of Affordable Housing Development	\$770				
AH111	Using the CDBG Program	\$385				
AH113	Using the HOME Program	\$770				
AH115	Using the Low-Income Housing Tax Credit (LIHTC) Program	\$770				
AH121	Real Estate Finance Nuts and Bolts	\$385				
AH221	Rental Housing Development Finance	\$770				
AH230	Multifamily Clean Energy Investment Playbook <b>NEW!</b>	\$770				
AH238	Shared Equity Multifamily Homeownership Models	\$770				
AH256	Shared Equity Housing: Creative Models to Preserve Affordable Homeownership	\$770				
<b>ASSET MANAGEMENT</b>						
AM121	Nuts and Bolts of Asset Management (CHAM)	\$1,155				
AM225	Affordable Housing Finance Workshop for Asset Managers	\$770				
AM321	Advanced Financial Tools for Asset Managers (CHAM)	\$1,155				
AM351rqbl	Advanced Housing Asset Management (CHAM)	\$1,733				
<b>COMMUNITY AND NEIGHBORHOOD REVITALIZATION</b>						
NR101	The Essential Tools of Successful Neighborhood Revitalization	\$770				
NR102	Strategies to Meaningfully Engage Stakeholders in Revitalization Planning	\$770				
NR115	Developing High-Impact Neighborhood Revitalization Strategies	\$770				
NR121	Measuring the Impacts of Your Revitalization Work	\$1,155				
NR235	Climate Mitigation: A Tool Kit for Community Developers <b>NEW!</b>	\$770				
NR253	The Good, the Bad, and the Ugly: How Urban Design Can Make or Break Your Revitalization Strategy	\$385				
NR305	Understanding Upzoning: Changing Rules, Changing Communities <b>NEW!</b>	\$770				
<b>COMMUNITY ECONOMIC DEVELOPMENT</b>						
ED110	Analytical Tools and Methods Used in Community Economic Development	\$385				
ED160	Financing Community Economic Development	\$770				
ED210	Positioning Programs for Success: Connecting Program Design to Community Economic Impact	\$770				
<b>COMMUNITY ENGAGEMENT</b>						
CB105	Foundations of Community Building and Engagement <b>NEW!</b>	\$770				
CB106	Laying the Groundwork for Effective and Sustainable Community Building <b>NEW!</b>	\$770				
CB121	Transforming Conflict Into Action	\$385				
CB200	Community Engagement: Measuring its Impact	\$1,155				
CB212	Storytelling for Oral History, Community Building, and Visioning	\$770				
CB225	Asset-Based Community Development: Practices & Principles	\$770				
CB277	The Building Leaders, Building Communities Experience: Facilitator Training	\$1,155				
CB320	Community Building and Engagement: Values and Conflicts	\$770				
<b>CONSTRUCTION AND REHAB</b>						
CP101	Housing Rehabilitation Design and Construction Basics	\$770				
CP151	So You Think You Can Dance... Leading Your Project through Codes & Permitting	\$385				
CP181	Housing Production and Risk Management <b>UPDATED!</b>	\$770				
CP189	Automate Rehab with Housing Developer Pro® 4.1	\$770				
CP255	How to Conduct a Rehab Home Inspection	\$1,155				
<b>FINANCIAL CAPABILITY, HOUSING EDUCATION AND COUNSELING (PRESENTED BY NCHEC)</b>						
H0103	Lending Basics for Homeownership Counselors <b>UPDATED!</b>	\$1,155				
H0105	Compliance with State and Federal Regulations	\$770				
H0109	Foreclosure Basics for Homeownership Counselors	\$770				
H0110	Introduction to Housing Counseling <b>UPDATED!</b>	\$1,155				
H0111	Home Equity Conversion Mortgages	\$1,925				
H0200	Ready, Set, Prep: Tackling the HUD Counselor Exam Step by Step	\$1,155				
H0208	Building Skills for Financial Confidence	\$770				
H0209	Delivering Effective Financial Capability Programs <b>UPDATED!</b>	\$770				

		AUG		
		MON 26	WED 28	THURS 29
		TUES 27		FRI 30
		TUITION		
<b>100 Level Fundamental course</b>				
<b>200 Level Intermediate course</b>				
<b>300-400 Level Advanced course</b>				
<b>FINANCIAL CAPABILITY, HOUSING EDUCATION AND COUNSELING (PRESENTED BY NCHEC)</b>				
H0210	Practice, Study, Success: Test Strategies for HUD's Counselor Certification Exam	\$770		
H0211	Credit Counseling for Maximum Results	\$1,155		
H0213	Fair Housing - What Professionals Need to Know	\$385		
H0219	Advancing Homeownership for People of Color	\$770		
H0220	Client Management and Tracking with CounselorMax®	\$1,155		
H0229	Homebuyer Education Methods: Training the Trainer	\$1,925		
H0247	Post-Purchase Education Methods	\$1,925		
H0248	Cracking the Code: HUD Compliance for Housing Counselors	\$770		
H0250	Homeownership Counseling Certification: Principles, Practices and Techniques, Part I <b>UPDATED!</b>	\$1,925		
H0274	Rental Housing Certification: Part 1	\$1,155		
H0288	Rental Eviction Intervention Certification: Part 1	\$1,155		
H0307	Advanced Foreclosure: Case Study Practicum	\$770		
H0310	Financial Coaching: Helping Clients Reach Their Goals	\$770		
H0324	Advanced Reporting and Customization for CounselorMax®	\$770		
H0345	Foreclosure Intervention and Default Counseling Certification, Part I	\$1,925		
H0360	Homeownership Counseling Certification for Program Managers and Executive Directors	\$1,925		
H0370bl	Financial Coaching Advanced Practicum: Taking Your Practice to the Next Level	\$770		
H0375	Financial Capability Program Design for Managers	\$770		
H0380	Compliance Check-Up for HUD Housing Counseling Program Managers and Executive Directors	\$1,155		
H0385	Using Trauma-Informed Skills in Financial Coaching	\$770		
H0388	Rental Eviction Intervention Certification Part 2: Program Design and Delivery	\$770		
<b>NONPROFIT MANAGEMENT AND LEADERSHIP</b>				
ML127	Designing and Delivering Dynamic Presentations <b>UPDATED!</b>	\$770		
ML160	Competitively Positioning Your Organization for the Future	\$770		
ML170	Laying the Foundation for Fundraising <b>UPDATED!</b>	\$770		
ML220	The Art and Science of Group Facilitation	\$770		
ML229	Emotional Intelligence (EI) at Work	\$770		
ML236	Using Tableau to Visualize Impact and Tell Your Story	\$770		
ML245	Leveraging Leadership Potential in Diverse Communities <b>UPDATED!</b>	\$770		
ML246	Leadership in All Directions: The Unique Role of a Senior Manager	\$385		
ML251	Developing Successful Partnerships with Native Organizations	\$770		
ML266	Brandraising: Raising Money and Visibility Using Smart Communications <b>UPDATED!</b>	\$385		
ML276	Developing a Donor Communications Plan <b>UPDATED!</b>	\$770		
ML280	Coaching Skills for Managers <b>UPDATED!</b>	\$770		
ML282	How to Negotiate: The Most Important Skill You Will Ever Learn!	\$770		
ML283	Advanced Negotiation: Mastering Difficult Conversations	\$770		
ML284	Influence Without Authority: Persuasion Skills You Never Knew You Had!	\$385		
ML287	Coaching Teams to Build Leadership <b>UPDATED!</b>	\$770		
ML297	Leadership Tools for Achieving Excellence	\$385		
ML312	Organizational Leadership Succession	\$770		
ML321	Culture Revolution: Transformational Change for a Sustainable Business Model	\$1,155		
ML324	From Silos to Collaboration: Building Partnerships with Health Institutions	\$1,155		
<b>NATIVE AMERICAN COMMUNITY DEVELOPMENT</b>				
ML251	Developing Successful Partnerships with Native Organizations	\$770		
<b>SINGLE-FAMILY AND SMALL BUSINESS LENDING</b>				
LE210	USDA Section 502 Direct Loan Application Packaging: Affordable Rural Homeownership <b>NEW!</b>	\$750		
LE225	How to Ensure Compliance in Single-Family Lending	\$1,155		
LE250	Community-Based Residential Lending - Outreach, Intake, and Loan Application Best Practices	\$770		
LE320	Effective Board Governance for Lending Operations <b>NEW!</b>	\$770		
<b>SYMPOSIUM</b>				
SY904	<b>SYMPOSIUM 45 &amp; FORWARD: READYING OUR FIELD FOR THE FUTURE</b>	<b>\$385</b>		



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 [collabornation.net/pittsburghnti2024](https://collabornation.net/pittsburghnti2024)

## AFFORDABLE HOUSING

### AH101 The Fundamentals of Affordable Housing Development

This course leads participants through the basics steps of developing an affordable housing project from site selection and project feasibility, through development team selection, to budget design and funding. Participants will also learn to assess the pros and cons of real estate development and how they can affect an organization's goals. The course will provide a secure grounding for new project managers as well as providing executive directors and board members a base of knowledge that will allow them to adequately follow the development process. This class satisfies the housing development course requirement for the Certified Housing Asset Manager designation. [Find out more about CHAM's Asset Management Professional Certificate Programs](#) or [visit CHAM's website](#).

### AH111 Using the CDBG Program

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

### AH113 Using the HOME Program

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

### AH115 Using the Low-Income Housing Tax Credit (LIHTC) Program

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

### AH121 Real Estate Finance Nuts and Bolts

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

### AH221 Rental Housing Development Finance

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

### AH230 Multifamily Clean Energy Investment **Playbook** **NEW!**

According to the Environmental Protection Agency, housing accounts for 20 percent 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. Learners will have an opportunity to examine the scoping, funding and staffing of climate-conscious multifamily housing as well as how to mitigate risk.





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### **AH238 Shared Equity Multifamily Homeownership Models**

Shared equity in affordable housing suggests single-family homeownership. Multifamily affordable housing suggests rental housing. Shared ownership may mean cooperatives or community land trusts. But many community developers have incorporated forms of individual homeownership, resident and community control and shared equity into multifamily affordable housing projects. The benefits to this are:

- ▶ Households who lack the ability to obtain a conventional mortgage have control and decision-making power over their homes.
- ▶ Establishment of a community in which people work together to maintain and conserve affordable housing for the long term.
- ▶ A balance of return on equity between individuals and community resources for affordable housing.
- ▶ Greater connection between housing residents and the larger community.
- ▶ Bringing shared equity and land-trust models into a more urban setting.

Three models of multifamily housing which combine community-controlled housing and shared equity are housing cooperatives, community land trusts and condominiums. This course explores these models and the ways in which affordable housing groups can integrate the concepts into their work.

### **AH256 Shared Equity Housing: Creative Models to Preserve Affordable Homeownership**

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

## **ASSET MANAGEMENT**

### **AM121 Nuts and Bolts of Asset Management (CHAM)**

Nuts and Bolts of Asset Management is an interactive and engaging course designed for housing practitioners and board members. It includes an overview of key property asset management concepts, theories and responsibilities, including the “double bottom line” concept of affordable housing ownership—the theory of steering properties toward both business and mission-based goals and outcomes. Additional topics 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, board members, and executives who supervise asset management. [Find out more about CHAM’s Asset Management Professional Certificate Programs](#) or [visit CHAM’s website](#).

### **AM225 Affordable Housing Finance Workshop for Asset Managers**

Affordable Housing Finance Workshop for Asset Managers is an interactive case study using an interconnected Microsoft Excel spreadsheet to develop a financing plan for a prototype new construction affordable housing property.

By the end of the course, participants will be able to:

- ▶ Coordinate or participate in the creation of a development financing plan, including building a pro forma and construction budget (sources/uses).
- ▶ Research and determine maximum rents and incomes from online HUD databases
- ▶ Estimate post development operating budgets through comparable analysis and 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.

This class satisfies the housing development course requirement for the Certified Housing Asset Manager designation. [Find out more about CHAM’s Asset Management Professional Certificate Programs](#) or [visit CHAM’s website](#).



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### **AM321 Advanced Financial Tools for Asset Managers (CHAM)**

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

### **AM351rqb1 Advanced Housing Asset Management (CHAM)**

Advanced Housing Asset Management (AHAM) is the final course in the Certified Housing Asset Manager (CHAM) series. It is designed for participants who have completed or tested out of all the other courses in the series (see the CHAM designation curriculum for details). This class will bring together all the aspects of asset management covered through the CHAM curriculum and will take place over a period of approximately 30 days in a combination of traditional classroom and online learning settings. At its conclusion, students will be prepared to submit their CHAM project for review, the final stage in securing the CHAM designation. Part I of this course will be three consecutive days held in a classroom.

Students will explore techniques for analyzing and managing portfolios of properties through exercises involving both case studies and analysis of their own organizations' portfolios. **Please bring a laptop and prepare materials in advance;** more information will be sent a few weeks prior to the start of Part I. In Part II of this course, students will prepare an asset management plan for one of their properties, analyzed and presented in the context of their property portfolio. This part of the course will use remote learning strategies where participants will schedule one-on-one coaching from the instructors on their property asset management plan and present a summary of their plan via videoconferencing to a group of fellow participants for peer feedback and insights. Part II will conclude within 30 days of the commencement of Part I. [Find out more about CHAM's Asset Management Professional Certificate Programs](#) or [visit CHAM's website](#).

## **COMMUNITY ECONOMIC DEVELOPMENT**

### **ED110 Analytical Tools and Methods Used in Community Economic Development**

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

### **ED160 Financing Community Economic Development**

This course provides an understanding of the vast array of tools and techniques for financing CED projects and programs, including a variety of lending and equity techniques, interest subsidies, loan guarantees, tax abatements, tax credits and special assessment districts. We will review the various types of financial intermediaries and the roles that they play. The class will explore many financing sources, including CDBG, 108, OCS, CDFI, Historic Tax Credits and New Markets Tax Credits. Case study exercises will be used and participants should bring a calculator.

### **ED210 Positioning Programs for Success: Connecting Program Design to Community Economic Impact**

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





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## COMMUNITY ENGAGEMENT

### **CB105 Foundations of Community Building & Engagement** **NEW!**

Do you give, involve, collaborate, or power share with residents as part of your work?

Join us in comparing four different community strategies: providing services, building relationships, engaging residents, and community organizing. While each community strategy can be useful, they create different benefits and lead to different results. It's critical that our organizations understand their differences and when and how to use them. Explore how your organization currently interacts with residents and create a plan that enhances connection and collaboration with residents.

Whether you're new to the field, been in it for decades, represent property management, or simply don't understand what "CBandE" is—this course is for you. We'll dig into how community building and engagement strategies benefit your organization, residents, local community, and your bottom line.

### **CB106 Laying the Groundwork for Effective & Sustainable Community Building** **NEW!**

This course focuses on strategies vital to successful community building activities and practices that are applicable in various areas of the community building continuum. Participants will learn about skills used in effective strategy development and implementation. We will have an opportunity to practice these skills through interactive activities, case studies, and discussion. The course covers key strategies involved in community building and provides tools and examples to implement in your organization/community. Join us for this interactive course, where we will learn resident and community engagement techniques and how to build meaningful relationships. Participants will spend time brainstorming relevant and effective community building strategies for their unique situation.

### **CB121 Transforming Conflict into Action**

Conflict means different things to different people, and often it has a negative connotation. Many people think of conflict as damaging or divisive. Using the Community Conferencing model for community conflicts, you will look at ways to use conflict as an opportunity to learn more about the issues and dynamics that divide groups and prevent progress. Through exercises, understanding of terms and sharing of experiences, you will develop skills to help bring the entire community into the resolution process. Learn ways to use conflict constructively to help bring individuals and groups in your community together in a way that builds positive and lasting change.

### **CB200 Community Engagement: Measuring Its Impact**

Maybe you know the neighborhood is looking better, more people are getting involved in community activities, and you have a sense that things are getting better. But how do you really know you are achieving the results you intend? Are you able to leverage your experience, to learn from your work to improve the design and implementation of your programs and strategies? This is a new, fully integrated evaluation and measurement course. Join us and learn about logic models, theories of change, participatory evaluation, and evaluation design and implementation—including assessment of your internal technical and financial capacity for evaluation. We will

- ▶ Define and learn to use appropriate indicators for particular goals and intervention strategies.
- ▶ Understand and design data collection methods and tools such as surveys, focus groups, interviews, and direct observation.
- ▶ Learn to identify and use appropriate secondary data sources.

Practical exercises will provide you with a comprehensive understanding of the dynamic relationship between data collection methodologies and data integrity and reliability. We will also explore the different data analysis and interpretation needs of different audiences. The laboratory will also provide you with the opportunity to practice interpreting and presenting results to specific audiences with particular interests. This course is offered jointly with NR121 Measuring the Impacts of Your Revitalization Work.

### **CB212 Storytelling for Oral History, Community Building and Visioning**

A community is more than bricks and mortar, investments and issues. It is a collection of shared history, hopes and dreams, defeats and struggles and victories. A collection best captured, stored and used in stories. Stories that explain us, and bring us together better than any technical study, formal report or comprehensive plan. This course is designed to teach participants to employ the power of story and storytelling in community-building, to create the safe and sometimes sacred space for people to share their stories, and to build community and form a shared vision of the future. The course will provide a framework, practice and methods that will prepare participants to plan and implement a Community Building Storytelling Project.



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### **CB225 Asset-Based Community Development: Practices and Principles**

Self-reliant communities have the internal strength to manage negative pressures and trends, and the organized capacity to advance democratically defined empowerment, growth and development objectives. These strengths and capacities are created through the community's ability to focus on its assets – the gifts of individual citizens, the capacities of neighborhood associations and community-based organizations and the often-hidden strengths of local institutions as the foundation of community building. The course utilizes case studies and practical exercises to provide participants with knowledge and skills to apply Asset-Based Community Development approaches and techniques to community organizing, neighborhood revitalization and the design and implementation of community services. We'll emphasize strategies for ongoing identification and development of community assets, and to make the asset-based approach an integral part of your organization's culture.

### **CB277 The Building Leaders, Building Communities Experience: Facilitator Training**

How would you feel if your next resident education program demanded a waitlist? How would you respond if your co-facilitator was a current resident? How would you show up if you knew resident participants would be recognized as meaningful changemakers?

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

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

### **CB320 Community Building and Engagement: Values and Conflicts**

The work of community organizing is always driven by values, and having a full understanding of what this means is essential to be an effective organizer. The values of an organization reflect the values of the individuals that

create and constitute the organization. To be effective, doing the work of the organization and working within the organization, we must have a clear understanding of our personal value system and how it fits in the organization's work and culture. In this course we'll explore how values are formed and transformed, what influence these processes, and how to deal with situations when our values may seem to be in conflict with our work. This is an advanced course meant for organizers with significant experience and willing to engage in a provocative and challenging discussion.

## **COMMUNITY AND NEIGHBORHOOD REVITALIZATION**

### **NR101 The Essential Tools of Successful Neighborhood Revitalization**

Comprehensive neighborhood revitalization doesn't just happen by itself – it requires an intentional process from initial research and analysis through evaluating results. During this fun and interactive two-day introductory course, participants will learn how to design and conduct a participatory neighborhood analysis process for comprehensive revitalization planning. You will also gain experience developing goals and measurable objectives and preparing a revitalization action plan. Recognizing that neighborhoods across the country vary widely and that each professional will bring a unique set of knowledge, skills and experiences to the course, it is designed to provide some common language and applied tools that participants can use for successful neighborhood revitalization in any community.

### **NR102 Strategies to Meaningfully Engage Stakeholders in Revitalization Planning**

Community involvement in visioning and planning a better future is undoubtedly one of the most critical elements of the revitalization process. Doing it well can be a very challenging task and failing to do it well can have a major negative impact on the process – maybe even cause its failure. An effective, successful participatory process not only results in revitalization plans that truly respond to a community's best interest, but the people engaged in it develop their leadership skills and are better equipped to continue advancing their community's interests. Participants in this two-day course will discuss key barriers to effective community participation and learn specific tools to overcome these barriers. Participants will also enjoy hands-on practice and exploration of various participatory planning techniques including the design charrette, the World Cafe and other innovative participatory exercises.





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### **NR115 Developing High-Impact Neighborhood Revitalization Strategies**

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

### **NR121 Measuring the Impacts of Your Revitalization Work**

Maybe you know the neighborhood is looking better, more people are getting involved in community activities, and you have a sense that things are getting better. But how do you really know you are achieving the results you intend? Are you able to leverage your experience, to learn from your work to improve the design and implementation of your programs and strategies? This is a new, fully integrated evaluation and measurement course. Join us and learn about logic models, theories of change, participatory evaluation, and evaluation design and implementation—including assessment of your internal technical and financial capacity for evaluation. We will

- ▶ Define and learn to use appropriate indicators for particular goals and intervention strategies
- ▶ Understand and design data collection methods and tools such as surveys, focus groups, interviews, and direct observation
- ▶ Learn to identify and use appropriate secondary data sources.

Practical exercises will provide you with a comprehensive understanding of the dynamic relationship between data collection methodologies and data integrity and reliability. We will also explore the different data analysis and interpretation needs of different audiences. The laboratory will also provide you with the opportunity to practice interpreting and presenting results to specific audiences with particular interests. This course is offered jointly with CB200 Community Engagement: Measuring Its Impact.

### **NR235 Climate Mitigation: A Tool Kit for Community Developers NEW!**

Climate mitigation, adaptation, and resilience have become key considerations for the affordable housing and community development fields. Increasing and Intensifying natural disasters, urban heat islands, and disparate impacts on communities of color and low- to moderate-income communities make it clear climate should be atop the community development agenda. And with the help of an array of new resources, this work is becoming increasingly accessible and affordable.

This interactive two-day course will present the mission and business case for making climate mitigation a core part of your organization's work. You'll obtain tools and ideas for reviewing your existing lines of business and how to integrate mitigation approaches and best practices. And you'll hear more about the latest federal funding resources that will make this work more affordable and feasible. We'll look at examples of successful climate interventions by community development organizations and how we can scale these efforts. Topics and strategies for climate mitigation to be discussed include electrification, community and rooftop solar, tax credits and financing, weatherization, and more.

### **NR253 The Good, the Bad, and the Ugly: How Urban Design Can Make or Break Your Revitalization Strategy**

Bad urban design, like its consequences, is obvious. Good design, however, often goes unnoticed and even more frequently discounted as a critical element of effective revitalization — a “pie in the sky,” good thing to have if only we didn't have more important things to worry about. In this class, we'll examine urban design as tool for revitalization, for building community and ensuring a safe public environment. We'll explore how urban design reflects social and economic imperatives and cultural values. We'll review urban design models to understand their positive and negative impacts on the form of cities and neighborhoods and use this knowledge in a case study to identify the negative consequences of bad design and to develop design-based strategies for revitalization.

The class includes a neighborhood tour. Wear comfortable shoes and dress appropriately for the weather.



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## **NR305 Understanding Upzoning: Changing Rules, Changing Communities** **NEW!**

Throughout the country, a housing supply shortage has resulted in record rent levels and house prices – whether the community is urban, rural, Tribal, suburban or ex-urban. One reason for limited housing supply is local zoning, which often precludes any housing form besides the single-family home. Recently, advocates around the country have recognized the role that single-family zoning plays in limiting housing supply, causing housing segregation, decreasing affordability, inflexible housing types that don't match the needs of today's households, and environmental damage. A few states and localities have begun to change single-family zones to allow for different types of housing, including accessory dwelling units, manufactured housing, small multifamily buildings, duplexes, triplexes and fourplexes. Others are amending their codes to support new environmentally friendly technologies in home building, such as manufactured housing, to improve resilience, reduce sprawl or create more inclusive, diverse communities.

This course will examine how zoning affects housing and how certain zoning changes can expand options for today's families. We will review what research tells us about the impact of zoning on housing costs, affordability, gentrification, displacement, and overall housing supply. Zoning to allow manufactured housing will be a common example used throughout the course, along with other new thinking from around the country. We will learn different models of zoning change that allow for increased density, and examine the lessons learned from advocates who both succeeded and failed to make zoning changes. We will discuss the role zoning has played in supporting racist policies as well as the role that zoning can play in providing the solution of flexible and inclusive housing. We will get past the NIMBY-YIMBY fights and delve into the underlying issues both in favor of and against zoning for greater density. Participants will gain knowledge of zoning, land use, how to initiate or support changes at the community, local or state level, and what to expect once zoning does change. You'll head home with a customized strategy for zoning change for your community.



## **CONSTRUCTION AND REHAB**

### **CP101 Housing Rehabilitation Design and Construction Basics**

Are you a new rehab specialist? Do you work in support of a housing rehab and repair program and want a better understanding of rehab practices? This entry-level course provides a crucial foundation so you can 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.

### **CP151 So You Think You Can Dance: Leading Your Project through Codes and Permitting**

Does it ever seem that your project approvals move one step up, and two steps back? Do building codes leave your head spinning? Learn the steps to glide through site plan approval, waltz your way through the historic preservation process, and swing a variance without stepping on the official's toes. Orchestrate the planning of utility considerations, easements and overlay districts, and choreograph all the footwork required to get your project out of the ground.

### **CP181 Housing Production and Risk Management** **UPDATED!**

This course prepares rehab specialists, project managers, executive directors and board members for success in production management. Learn the various models of production ranging from full architecture services to emergency repairs. Examine the three prime subsystems of all production management systems: risk control, financial control and time and team management. Evaluate various programs that can help build and maintain efficiency. Recommended as an introductory course for rehab specialists and project managers or a solid overview course for executive directors and board members.

### **CP189 Automate Rehab with Housing Developer Pro® 4.1**

Housing Developer Pro (HDP) focuses on housing rehabilitation and project management for single-family and multifamily properties. Discover how this software program will assist the rehab specialist and construction manager by automating property inspections, the creation of specifications/scope of work and cost estimates, scheduling, the creation of draw schedules, and other important tasks. This two-day course covers all of the enhancements included in HDP 4.1 and also includes content for performing field inspections. Basic familiarity with Windows required.



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## **CP255 How to Conduct a Rehab Home Inspection**

Whether owner-occupied or acquisition rehab, this advanced-level 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. This course focuses on the process of inspections for the sake of determining feasibility and creating a scope of work for contractors. You'll learn the skills to properly conduct an inspection, including inspection challenges, the inspection process and routine, necessary inspection forms and 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 ensure your inspection is non-invasive. 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 needed by any rehab/construction specialist.

## **FINANCIAL CAPABILITY, HOUSING COUNSELING AND EDUCATION**

### **H0103 Lending Basics for Homeownership Counselors UPDATED!**

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

### **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 participants 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. In this course participants also examine the influence of nonfederal requirements on local lending activity, including state regulations and licensing requirements, and learn about successful efforts to reduce restrictive regulations by states.

### **H0109 Foreclosure Basics for Homeownership Counselors**

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

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

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

### **H0110 Introduction to Housing Counseling UPDATED!**

Participants learn the principles and applications of housing counseling from the industry's and the counselor's points of view to help them acquire the basic skills needed to be effective in their work. You'll gain best practices for effective counseling, essential elements of pre- and post-purchase counseling for homeowners, and how to address delinquency and default counseling. You'll be introduced to common client issues and effective intervention strategies. Participants will take home practical tools to help renters, prospective homebuyers and existing homeowners develop and manage basic household budgets, enhance their savings practices and loan payment, improve credit scores, and recognize and avoid predatory lenders.







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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 or nonprofit professionals new to the reverse mortgage field, this course describes the HECM loan program roles and responsibilities, introduces loan calculations and distinguishes HECM loan features. Qualifying for the HUD HECM Counselor Roster and preparing for the HUD HECM Counselor exam will also be covered. Students new to the world of reverse mortgages are strongly encouraged to take the eLearning course HECM Counseling Basics Overview (H0104el) as a prerequisite to this course. Additional independent study after completing the course will be required to successfully complete the HUD HECM Counselor Exam.

### **H0200 Ready, Set, Prep: Tackling the HUD Counselor Exam Step by Step**

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

### **H0208 Building Skills for Financial Confidence**

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

### **H0209 Delivering Effective Financial Capability Programs **UPDATED!****

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

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

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

### **H0211 Credit Counseling for Maximum Results**

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



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

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

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

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

This faculty-led online pre-purchase homeownership education course is designed to teach participants how to design and deliver impactful homebuyer education in a variety of settings. You'll become familiar with core homebuyer education content and how to tailor your educational approach to your target audience. Learn to use the best materials and methods to train homebuyers on how to

assess readiness, shop for a home, get a mortgage loan, improve their budget and credit profiles, and maintain their home and finances after purchase. Participants will engage in hands-on activities that will help them improve their facilitation skills and deliver interactive training sessions based upon effective adult education methodology. Participants should be familiar with mortgage industry terminology and processes prior to taking this class. Lending Basics (H0103) should be taken as a prerequisite should you need to build your knowledge in this area. This course certifies you in homebuyer education delivery, and a post-course exam is required for all participants.

## **H0247 Post-Purchase Education Methods**

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

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

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

## **H0248 Cracking the Code: HUD Compliance for Housing Counselors**

Are you working for a HUD-approved agency and not sure how that impacts the way you do your job? Being HUD-approved raises the bar not just for your organization but also for the work you do.

This course gives you resources and checklists for working with clients, having complete files, managing your time and all the other things you really need to know. We review the key features of relevant, national HUD programs, including fair housing, and help you crack the code about 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.



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### **H0250 Homeownership Counseling Certification: Principles, Practices, and Techniques, Part I** **UPDATED!**

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

Upon completing the course, participants will be equipped with the necessary skills and knowledge to carry out their duties and responsibilities effectively as pre-purchase homeownership counselors.

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

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

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

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

### **H0307 Advanced Foreclosure: Case Study Practicum**

This two-day course focuses on the skillsets that foreclosure intervention counselors need to assist their clients. It is designed to address and practice four content areas:

- ▶ Core Elements.
- ▶ Analysis and Assessment.
- ▶ Solution-Focused Counseling Skills.
- ▶ Submission and Closure of the Loss Mitigation Package.

This course is an opportunity to put foreclosure intervention skills into practice in a real-world and hands-on setting. It satisfies Part II of the training requirements for the Foreclosure Intervention and Default Counseling Certification, Part I program. 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.

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

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





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

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

## **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 rigorous, in-depth course covers critical elements of the default and foreclosure process as well as loss mitigation options for prime and subprime loans. Participants will engage in exercises and utilize case studies which will sharpen their negotiating skills with servicers and improve their counseling methods with clients. There are two training requirements for certification. This course is Part I. We recommend that participants complete H0109 Foreclosure Basics or H0109e1 Foreclosure Basics (e-learning) first. H0109 will prepare you for the advanced teachings of this course, H0345. Part II requires completion of course H0307 Advanced Foreclosure: Case Study Practicum (also available in a virtual classroom format, a Faculty-Led course - H0307VC)



## **H0360 Homeownership Counseling Certification for Program Managers and Executive Directors**

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

- ▶ Diversify funding sources.
- ▶ Recruit, manage and retain counseling staff.
- ▶ Perform contract reviews and programmatic assessments.
- ▶ Efficiently manage case files utilizing a variety of time management techniques.

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

## **H0370b1 Financial Coaching Advanced Practicum: Taking Your Practice to the Next Level**

Through a combination of in-person and virtual training activities, this highly interactive, blended course will further develop the skills of financial coaches who work with clients to reach their financial goals and increase their financial capability. Building on the model and tools introduced in H0310 Financial Coaching: Helping Clients Reach Their Financial Goals, you will practice and increase coaching skills that support starting and closing a coaching engagement, being attuned to clients' beliefs and values, and facilitating decisions and actions.

The training will also cover trauma-informed practices, using an equity lens, and using a coaching approach with different financial behaviors and situations. The training begins with a two-day, in-person class to review and apply how to use a coaching approach to help clients change financial behaviors and reach financial goals.

That is followed by two weeks of asynchronous online learning to deepen your coaching practice and knowledge. The training ends with a two-hour webinar to consolidate what you have learned and plan for further integration of coaching skills into your work.



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 [collabornation.net/pittsburghnti2024](http://collabornation.net/pittsburghnti2024)

### **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 thoughts and behaviors. Those effects can deter people from engaging and staying in financial coaching services. For people and communities faced with poverty, racism, and other chronic stressors, trauma may be more prevalent due to systemic and personal harms. Creating a trauma-informed environment in your financial coaching program increases inclusion – helping organizations to realize more equitable financial outcomes for people who have been impacted by toxic systems and who face multiple barriers to financial well-being.

A trauma-informed environment acknowledges how pervasive trauma is and consistently responds in ways that build safety and trust for clients throughout the program. This course will provide financial coaches with the knowledge, skills, and tools to be trauma-informed when working with clients in an immediate financial crisis or experiencing longer-term financial insecurity. Financial coaches will practice the principles and practices of being healing-centered and how that approach aligns with the proven strategy of financial coaching in facilitating financial stability and well-being.

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

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







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## NONPROFIT MANAGEMENT AND LEADERSHIP

### ML127 Designing and Delivering Dynamic Presentations **UPDATED!**

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

### ML160 Competitively Positioning Your Organization for the Future

Your nonprofit organization has a position in the marketplace – intentional or otherwise. That position has a profound impact on organizational success. In this highly participatory course, participants will assess their current position and explore tangible, practical tools to use in repositioning. Explore new ways of thinking about positioning and the application of these concepts to organizational planning, management and marketing approaches. Learn to better understand customer views, evaluate the impact of big-picture environmental trends, and assess internal capacity as it relates to positioning. Participants will spend time crafting a powerful, succinct written statement of their program's or organization's unique position.

### ML170 Laying the Foundation for Fundraising **UPDATED!**

Learn the three-stage model of resource development that demystifies the process of fundraising for organizational sustainability – preparation and planning, cultivation and asking, and sustaining and thriving. An extremely interactive course, ML170 reveals key resource development concepts for organizations creating and supporting vibrant communities and social change. This course is designed for those responsible for identifying and capturing resources to bring to their community development organizations. Explore how to develop a “culture of philanthropy” that engages all stakeholders in supporting your resource development efforts.

### ML220 The Art and Science of Group Facilitation

Group facilitation is both an art and a science. While most of us learn to facilitate from experience, there are proven methods that can improve our skills and maximize our impact. This highly interactive, intermediate level course will assess personal facilitation strengths and weaknesses and examine how our facilitation roles impact the approach we select. Participants will practice techniques for moving groups toward decision-making and strategies for managing difficult individual behaviors and group dynamics. Ideal participants will have facilitation experience but are seeking to develop a facilitation “roadmap” to improve specific skills.

### ML229 Emotional Intelligence (EI) at Work

The rapidly changing world of neuroscience has given rise to concepts of multiple types of intelligence, including emotional and social intelligence. Success in an organization is no longer solely defined by task skills, abilities and traditional leadership models. Self-awareness of our emotions and those of others is critical to building healthy organizations. In this introductory- to intermediate-level, hands-on course, we will discuss what emotional intelligence is, examine the basic neuroscience behind the model, and assess EI competencies. We will identify how emotional intelligence impacts both the business of our organizations and our daily working environment. Participants will discuss how EI can strengthen leadership roles and build better teams as well as learn ways that their EI capacity can be strengthened over time.

### ML236 Using Tableau to Visualize Impact and Tell Your Story

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





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### **ML245 Leveraging Leadership Potential in Diverse Communities** **UPDATED!**

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

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

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

### **ML251 Developing Successful Partnerships with Native Organizations**

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

### **ML266 Brandraising: Raising Money and Visibility Using Smart Communications**

**UPDATED!**

As you expand the tools you use to communicate online and off, and as your staff's 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 ways to create a compelling brand that expresses the positioning and personality of your organization, attracts the right people, and helps you use your brand to take your organization to the next level. In addition to 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

### **ML276 Developing a Donor Communications Plan** **UPDATED!**

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



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### **ML280 Coaching Skills for Managers** **UPDATED!**

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:

- ▶ 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.

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

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

### **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!**

Discover how to influence, motivate and lead individuals and teams to resolve issues and meet project goals efficiently, effectively and collaboratively. ML284 is designed to help participants understand their own sources of influence and how to influence clients, colleagues and teams even when you don't have the authority to mandate compliance. We will look at proven tools and frameworks including relationship mapping, the ladder of understanding, and knowing your influence currencies as well as theirs. This highly interactive course will assist you in creating a personal action plan to implement when you return home.

### **ML287 Coaching Teams to Build Leadership** **UPDATED!**

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

### **ML297 Leadership Tools for Achieving Excellence**

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



# 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 [collaboration.net/pittsburghnti2024](http://collaboration.net/pittsburghnti2024)

## **ML312 Organizational Leadership Succession**

Leadership succession is an ongoing and adaptive process, and this course offers methods for integrating succession planning into organization-wide systems and culture. The highly interactive course covers major elements, success factors and effective practices involved in preparing for succession in key staff and board leadership positions. Participants will have an opportunity to assess the readiness of their own organizations, explore development of internal leadership and talent, and identify action steps for enhancing the conditions for successful leadership transitions. Ideal attendees include not-for-profit organization executives and staff managers, as well as board members.

## **ML321 Culture Revolution: Transformational Change for a Sustainable Business Model**

Transforming your organization to run as a social enterprise can mean great things for your long-term sustainability through increased earned revenue. But the shift in business model can entail profound organizational changes, resulting in culture shock as your organization adapts to new and different ways of work. This course provides a framework for navigating the ups and downs of change as an organization transitions to a social enterprise business model. The fundamentals of organizational transformation will be explored as participants learn what it takes to create a climate for change, to examine status quo and its implications on their business, and to communicate change to support buy-in with staff, stakeholders, and the community. Participants will also learn how to craft a vision statement that captures the future for the business as it strives to meet a “double bottom line” of both mission and profitability. Recommended for executive and senior management staff members and board members, as well as program staff of nonprofit organizations.

## **ML324 From Silos to Collaboration: Building Partnerships with Health Institutions**

Housing is health, and we will only achieve health equity when the drivers of health – quality affordable housing, equitable economic opportunities, climate-resilience infrastructure and more – are available in all communities. Learn how you can partner with health institutions to harness their assets such as money, land, expertise and relationships to advance your community’s priorities. In this action-oriented course, participants will explore ways to achieve their community’s goals by partnering with health institutions, engaging the local community and like-minded partners, building systems-level strategies and developing an equity mindset inside their own organizations. This three-day course is designed for community development and affordable housing leaders and their senior staff.

## **SINGLE-FAMILY AND SMALL BUSINESS LENDING**

### **LE210 USDA Section 502 Direct Loan Application Packaging: Affordable Rural Homeownership NEW!**

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

### **LE225 How to Ensure Compliance in Single-Family Lending**

The regulatory climate for the mortgage industry is always evolving and often challenging to understand. A key component to the success of your single-family lending program is maintaining compliance with these sometimes-complicated laws. This intermediate course will provide you with the guidance you need to ensure you and your organization are fully compliant in the area of residential mortgage lending. Together, we’ll review and strategize around:

- ▶ Federal mortgage lending regulations and how they apply to your operation.
- ▶ Key components to create and ensure ongoing compliance.
- ▶ Quality control compliance plan -- what do we need, why, and how do we build it?
- ▶ Other considerations and implications for your business related to compliance.

You’ll leave with the confidence you need to run and grow your program!



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

This intermediate-level course is designed for residential Mortgage Loan Originators (MLOs) working for nonprofits and other community-based mortgage lenders. The course primarily focuses on the outreach, intake and application steps in the mortgage origination process, including best practices and compliance considerations.

Course content is geared toward the typical duties and responsibilities of these MLOs or others within a lending organization serving in a similar role of prospecting for residential lending customers and/or working with them during outreach, intake/assessment and formal loan application. Activities focus on the unique considerations that confront community-based MLOs performing these functions. Participants will also be provided with detailed guidance and strategies on how to develop and manage a successful personal production plan.

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## **LE320 Effective Board Governance for Lending Operations NEW!**

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





WEDNESDAY, AUGUST 28 • 8:30 A.M. — 4 P.M. ET

# 45

# & FORWARD:



## READYING OUR FIELD FOR THE FUTURE

**Delve into bold predictions, insights and dialogue that will enable us to navigate the future with strength and agility.**

**“NO ONE CAN PREDICT THE FUTURE. BUT ANYONE CAN LEARN TO THINK ABOUT THE FUTURE MORE IMAGINATIVELY AND SYSTEMATICALLY, TURNING UNCERTAINTY INTO INSPIRATION FOR ACTION AND INCREASED RESILIENCE.”**

**– The Institute for the Future**

*For 45 years, NeighborWorks, its network affiliates, and the broader community development field have evolved to meet changing needs, new opportunities and unforeseen challenges.*

*In 1978, Congress chartered NeighborWorks to spread a relatively new model of community development across the country. This model had its origins in the Central North Neighborhood of Pittsburgh. There, a community development pioneer named Dorothy Mae Richardson galvanized her neighbors and other public and private partners to save their neighborhood from blight and urban renewal. Her resident-led revitalization efforts became the centerpiece of the first Neighborhood Housing Services, the model that Congress charged NeighborWorks with spreading across the country. Today, nearly 250 NeighborWorks network organizations occupy a vital place in the community development field.*

**Join us for a special Wednesday symposium that celebrates our 45th anniversary while exploring and preparing for our collective future!**

Our founding was part of the emerging field of community development. At the time, it's unlikely that the early champions of this movement envisioned all that would come, including that by the 2020s there would be over 6,000 community development corporations (CDCs) serving rural, urban and suburban communities across the country. Yet the model they created has proven exceptionally strong. CDCs and other community-serving nonprofits have grown and adapted in response to major challenges over the past 45 years, including pivoting to address inequality, the shifting nature and geography of poverty, economic crises like the Great Recession, and, most recently, a global pandemic. In carrying out their missions, CDCs expanded opportunities through homeownership and affordable housing, led comprehensive change efforts, developed and supported resident leaders, and invested in communities using innovative financial tools.

**Yet the pace of change is accelerating, and organizations are wondering how to remain responsive and ready for an uncertain future.**

Despite these accomplishments, communities remain vulnerable to seismic changes underway in the economy, demographics, the housing and labor markets, climate and technology. While they will impact society at large, these changes particularly

threaten communities of color, Native communities, and historically under-resourced rural areas. **There is no resting on our laurels after 45 years – we need to look back and gather the lessons learned so we can effectively navigate the future.**

During this symposium, we will collectively consider how we can respond to trends with the same spirit of strength and flexibility that has defined the field for the past 45 years.

**Key questions include:**

- ▶ How can organizations better understand potential disruptions in the decade ahead?
- ▶ What lessons can we carry forward from the past?
- ▶ What new tools, resources and planning will we need?
- ▶ What steps can we take now to adapt and remain strong and proactive, so that our communities have the future they've been working toward?

Strategies, approaches and content from plenaries with cross-sector experts and small-group visioning will enable you to develop your own ten-year forecast.

The symposium will engage everyone from executive leadership to frontline staff in thinking about how we can make our organizations and communities “future ready.” With help from our partners at The Institute for the Future, we'll apply tested concepts, tools and frameworks for “turning uncertainty into inspiration for action.”

# PEER LEARNING, NETWORKING, AND INSTITUTE OFF-HOURS!

We've been intentional about including expert instruction in the NeighborWorks Training Institute. But each day, we've built in free time around class hours so you can spend time with colleagues or on your own.

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)	



**Register for these sessions on the event platform when you register for courses — or show up onsite and if space is available, you'll be welcome!**

Relaxing, rejuvenating, networking or getting your heart rate up – your choice! Peer learning and networking informally with colleagues, and focusing on personal growth and enjoying the company of fellow professionals, is also important—it encourages a relaxed, positive and open mindset and truly brings your learning to life! Check out the fun and impactful activities we've built into the timeslots around course offerings—and be sure to participate as time permits. We'll be adding new workshops, roundtable discussions, and other opportunities to connect with fellow learners. So, check our event website and registration platform regularly and be on the lookout in Pittsburgh for sessions and fun activities to enhance your professional learning experience.

## FUN ACTIVITIES

### Monday 11:30 a.m. – 12:45 p.m. ET › Opening Plenary

Kick off the week by sharing a celebratory lunch with your colleagues and peers. More details to come, so save the time slot for this memorable and fun event!

### Sunday 3:00 p.m. – 5:00 p.m. ET › Scavenger Hunt

Join us for a fun scavenger hunt and compete for prizes while exploring your “home” for the week and meeting your fellow participants. Stop by Registration on Sunday to learn more and start hunting!

### Ongoing Beginning Monday › Walking Challenge

Put on your walking shoes and explore the streets (and shops, and restaurants!) of Pittsburgh while getting your steps in and competing for prizes. Log your steps Monday through Thursday, and the winner will be announced Friday. Be sure to sign up for the walking challenge on the event site -- pre-registration is required.

Continued on Next Page



# PEER LEARNING, NETWORKING, AND INSTITUTE OFF-HOURS!

Continued from Page 24

## FUN ACTIVITIES

### Ongoing Beginning Monday › **Fill Our Neighborhood**

As you pick up your name badge and registration materials, be sure to “fill our neighborhood” with words of inspiration and encouragement for your fellow participants.

### Ongoing Sunday-Thursday › **Invisible Threads No-Sew Blanket Volunteer Activity**

Join this heartwarming movement and volunteer with us for Invisible Threads – creating no-sew blankets for a cause! Embrace the joy of giving back as we come together to create cozy, no-sew blankets for a local organization in need. Whether you're a seasoned volunteer or a first-timer, your contribution will make a meaningful impact. Share smiles, laughter, and warmth as we tie together compassion and creativity.

### Ongoing › **Chillax Lounge**

Immerse yourself in a world designed just for you, where gaming, relaxation, and connecting with fellow participants take center stage. From thrilling virtual reality adventures to classic games like Uno and Connect Four, there's an experience tailored to every taste. Unwind, challenge yourself, and forge new connections in an environment crafted for enjoyment.

### Ongoing › **Quiet Sensory Lounge**

Need a break? Step into our Quiet Sensory Lounge. You can unwind and recharge in this immersive environment, perfect for reducing stress and promoting mindfulness. The tranquil space is designed to engage and relax the senses. It incorporates elements such as soft lighting, calming sounds, Zen gardens, coloring pages and comfortable seating to create a soothing atmosphere.

**Afternoon Workshops and Other Growth Sessions – Information coming soon. Watch your email!**



**Register for these sessions on the event platform when you register for courses – or show up onsite and if space is available, you'll be welcome!**



# 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](mailto:nti@nw.org) or call us at 800-438-5547.

## REGISTRATION

Register online at <https://collaboration.net/pittsburghnti2024> by Monday, July 29, 2024. If you do not require lodging, you can register on-site based on course availability.

## SCHOLARSHIPS

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

## PAYMENT POLICY

Prices for courses are listed on the grid on page 5. Credit card payment is required at the time of registration. To arrange payment by check or to arrange group registrations, please email or call us. Staff of the 240+ NeighborWorks Network Member Organizations receive discounted course tuition pricing (35% or more) 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 Response team no later than July 29, 2024 at [nti@nw.org](mailto:nti@nw.org) or call 1-800-438-5547, if you have special needs under the Americans with Disabilities Act related to your NeighborWorks Training course or your event lodging needs, if your reservation was made by NeighborWorks Training.

## EVENT LODGING

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

## REGISTRATION CHANGES

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

## SUBSTITUTIONS

Substitutions will not be processed for this event.

## CANCELLATIONS/REFUNDS

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

## TRAVEL AND MEALS

Meals are not served and are at your own discretion. The event does provide a minimum of two coffee/beverage breaks are provided each day. Please see the event travel and logistics guide for event specific details. If NeighborWorks does cover your travel, instructions on how to book travel will be included in the Travel and Logistics Guide available in the virtual event platform. Please visit [the event resources page](#) 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:

- ▶ July 29, 2024: Registration Deadline for in-person event
- ▶ July 29, 2024: Last day to make course changes for the in-person event
- ▶ July 29, 2024: Recommended last day to cancel from the event if your plans have changed

[Join us Aug. 8 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 Pittsburgh!](#)

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/pittsburghnti2024](https://NeighborWorks.org/pittsburghnti2024)

For customer support reach us at [nti@nw.org](mailto: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.

## NEIGHBORWORKS TRAINING INSTITUTE

Philadelphia, PA (Feb 10-14, 2025) and  
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
- ▶ FUN!

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