

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

**NEIGHBORWORKS  
TRAINING INSTITUTE**

**DECEMBER 9-13, 2019 • PORTLAND, OR**

The highest quality professional development,  
skill building and career enhancement in  
community development and nonprofit management

# **COMMUNITY ENGAGEMENT FINANCIAL CAPABILITY MANAGEMENT AND LEADERSHIP & MORE**

**SYMPOSIUM:  
Expanding Financial  
Opportunity: Catapulting  
Communities Forward**

**3 CAN LEARN FOR THE  
PRICE OF 2! SEE PAGE 22**



# WELCOME TO PORTLAND



Marietta Rodriguez, President  
and Chief Executive Officer

**“Whatever it is... you can in Portland.”** That’s the tourism bureau slogan for the city of Portland, Oregon. What an appropriate sentiment for us to adopt as we head to “The City of Roses.” As our NeighborWorks Training Institutes (NTIs) move from city to city, we are often reminded about the great work and sense of community found across the country. Portland is no exception and knowing that it is recognized for “being a friendly town where people are nice to strangers” should make us all feel at home and make it easy for us to get to work addressing today’s community development challenges. Opportunities abound and are seemingly limitless in Portland; and like this wonderful city, our NTIs are increasing opportunities for individuals and families.

When I look back over this year and the content for each of our NTIs/NTI symposiums, I’m quite proud of the content we put forth – exploring the theme(s) of reducing the opportunity gap and not limiting one’s opportunities. We started 2019 in Cleveland focused on “Removing Barriers to Sustainable Housing Affordability”. Then it was on to New Orleans, where we zeroed in on the health and well-being of diverse communities and what

we could do to reduce the life expectancy gap. We will round out the year in Portland where we will deep-dive into financial capability, exploring the many contributing factors and best practices in this area.

Situated in the Pacific Northwest, it’s been said that even the “Type A” personality is a bit more relaxed in Portland. I don’t know if it’s the fresh air or the food. But what I do know is that the activities and culture of the city lend themselves to intersections and connections in and out of the classroom. Martin Luther King, Jr. said it best: “We are all caught in an inescapable network of mutuality, tied into a single garment of destiny.” I encourage each of you who plan to join us in Portland to grab a colleague or a new friend/classmate and find your mutuality. Portland is the place for great excursions, an abundance of art and one-of-a-kind food experiences (not just Voodoo Donuts), but if you go, be sure and enjoy one for me! I look forward to seeing you in Portland.

*Marietta Rodriguez*

# AGENDA

## SUNDAY-DECEMBER 8

3:00 p.m. – 6:00 p.m. • Registration

## MONDAY-DECEMBER 9

- 6:45 a.m. – 8:15 a.m. • Morning Snack (*breakfast breads, coffee/tea and fruit*)
- 7:00 a.m. – 5:00 p.m. • Registration
- 8:30 a.m. – 4:00 p.m. • Courses (*See options in this brochure and online NeighborWorks.org training and register for your first and second choices.*)
- 11:30 a.m. – 1:00 p.m. • Lunch on Your Own
- 4:30 p.m. – 6:00 p.m. • Free Afternoon Workshops\*

## TUESDAY-DECEMBER 10

- 6:45 a.m. – 8:15 a.m. • Morning Snack
- 7:00 a.m. – 5:00 p.m. • Registration
- 8:30 a.m. – 4:00 p.m. • Courses
- 11:30 a.m. – 1:00 p.m. • Lunch on Your Own
- 4:30 p.m. – 6:00 p.m. • Free Afternoon Workshops\*

## WEDNESDAY-DECEMBER 11

- 6:45 a.m. – 8:15 a.m. • Morning Snack
- 7:00 a.m. – 5:00 p.m. • Registration
- 8:30 a.m. – 4:00 p.m. • Courses
- 11:30 a.m. – 1:00 p.m. • Lunch on Your Own

## THURSDAY-DECEMBER 12

- 6:45 a.m. – 8:15 a.m. • Morning Snack
- 7:00 a.m. – 5:00 p.m. • Registration
- 8:30 a.m. – 4:30 p.m. • Courses
- 11:45 a.m. – 1:00 p.m. • Lunch on Your Own

## FRIDAY-DECEMBER 13

- 6:45 a.m. – 8:15 a.m. • Morning Snack
- 8:30 a.m. – 2:30 p.m. • Courses
- 11:45 a.m. – 1:00 p.m. • Lunch on Your Own
- 2:30 p.m. • Training Institute Adjourns

**\*A list of workshops will be included in your on-site registration packet.**

# WHEN

## Registration Deadlines:

- October 21\*** • Register by this date and be included in a raffle to win a KINDLE
- November 18** • Substitution Deadline
- November 18** • Cancellation Deadline | Last Day to Register
- December 8** • On-Site Registration

## Special deadlines for participants from NeighborWorks Network organizations:

- October 14** • Registration Deadline
- November 8** • Substitution Deadline | Lodging Changes
- November 18** • Cancellation Deadline
- November 18** • Pay Own Expenses Deadline (*see page 28 for more details*)

## Visit [NeighborWorks.org/scholarships](http://NeighborWorks.org/scholarships) for scholarship information

See [NeighborWorks.org/training](http://NeighborWorks.org/training) for full course descriptions.  
A list of courses offered at this event are on pages 4–5.



**\*REGISTER BY THE DEADLINE AND YOU'LL BE INCLUDED IN A RAFFLE TO WIN A KINDLE.**

## REGISTRATION IS EASY!

1. Look over the course offerings grid on pages 4 and 5 of this brochure, and then visit [neighborworks.org](http://neighborworks.org) course catalog for full course descriptions and prerequisite information.
2. Decide on your first- and second-choice courses for each day of the week.
3. Click on [NeighborWorks.org/onlineereg](http://NeighborWorks.org/onlineereg) to set up your profile and register for your courses, or fax us a hard-copy registration form, which can be found on page 27 or 29 of this brochure.
4. Three can learn for the price of two – see page 26 for more details.

**It's that easy! Questions or concerns? We're here to help.**  
Call our Customer Response team at (800) 438-5547, or e-mail us at [nti@nw.org](mailto:nti@nw.org)

# WHERE

**Hilton Portland Downtown**  
*call in block is available*  
921 SW Sixth Ave.  
Portland, OR 97204  
(503) 226-1611

**The Duniway Portland, A Hilton Hotel**  
*call in block is not available*  
545 SW Taylor St.  
Portland, OR 97204  
(503) 553-7000

**DoubleTree by Hilton Hotel Portland**  
*call in block is available*  
1000 NE Multnomah St.  
Portland, OR 97232  
(503) 281-6111

**Oregon Convention Center**  
777 NE Martin Luther King Jr. Blvd.  
Portland, OR 97232  
(503) 235-7575

**Portland Marriott Downtown Waterfront**  
*call in block is not available*  
1401 SW Naito Pkwy  
Portland, OR 97201  
(503) 226-7600

**Crowne Plaza Portland-Downtown Convention Center**  
*call in block is not available*  
1441 NE 2nd Ave.  
Portland, OR 97232  
(503) 223-2401

# COURSES OFFERED AT THIS EVENT

			DECEMBER			
			TUITION	MON 9 TUES 10	WED 11	THURS 12 FRI 13
<b>AFFORDABLE HOUSING</b>						
AH102	The Basic Steps of the Affordable Housing Development Process	\$595				
AH111	Using the CDBG Program <b>UPDATED!</b>	\$300				
AH113	Using the HOME Program	\$595				
AH115	Using the Low-Income Housing Tax Credit (LIHTC) Program	\$595				
AH116	Using New Markets Tax Credits	\$300				
AH121	Real Estate Finance Nuts and Bolts	\$355				
AH183	Supportive Housing: Developing Solutions and Supporting Residents	\$595				
AH211	How to Maintain Compliance in LIHTC Projects	\$300				
AH218	If It Can Go Wrong: Resolving Predictable Crisis in Real Estate Development <b>NEW!</b>	\$595				
AH221	Rental Housing Development Finance	\$655				
AH256	Shared Equity Housing: Creative Models to Preserve Affordable Homeownership <b>UPDATED!</b>	\$595				
AH271	Budget Basics: Decoding the Mysteries of the ProForma	\$655				
AP301	Exit Strategies for LIHTC Projects	\$655				
<b>ASSET MANAGEMENT</b>						
AM121	Nuts and Bolts of Asset Management (CHAM) <b>UPDATED!</b>	\$895				
AM225	Affordable Housing Finance Workshop for Asset Managers	\$595				
AM290	Asset Management Fundamentals (CHAM)	\$895				
AM291	Financial Fundamentals for Asset Managers (CHAM)	\$655				
AM351	Advanced Housing Asset Management (CHAM) <b>UPDATED!</b>	\$1,195				
<b>COMMUNITY AND NEIGHBORHOOD REVITALIZATION</b>						
NR101	The Essential Tools of Successful Neighborhood Revitalization	\$595				
NR102	Strategies to Meaningfully Engage Stakeholders in Revitalization Planning	\$595				
NR116	Building Community and Promoting Equity through Revitalization	\$595				
NR121	Measuring the Impacts of Your Revitalization Work	\$965				
NR124SV	Reading a Neighborhood: What a Walk Around the Block Can Tell You	\$385				
NR171SV	Community Development: Past, Present and Future	\$645				
NR190	Leveraging Arts and Culture for Affordable Housing and Equitable Community Development <b>NEW!</b>	\$645				
NR240	Rethinking Reentry: The Role of Community <b>NEW!</b>	\$595				
NR253	The Good, the Bad and the Ugly: How Urban Design Can Make or Break Your Revitalization Strategy	\$300				
NR255	Resident Leadership as the Central Neighborhood Revitalization Strategy <b>NEW!</b>	\$595				
NR276	Creating a Fantastic Image for Your Neighborhood	\$300				
<b>COMMUNITY ECONOMIC DEVELOPMENT</b>						
ED101sv	Community Economic Development Principles, Practices and Strategies	\$710				
ED110	Analytical Tools and Methods Used in Community Economic Development	\$300				
ED160	Financing Community Economic Development	\$645				
ED210	Positioning Programs for Success: Connecting Program Design to Community Economic Impact	\$645				
ED215	So You Think You Want to Start a Social Enterprise?	\$655				
ED255	Developing a Creative Economy Strategy in Your Community	\$325				
<b>COMMUNITY ENGAGEMENT</b>						
CB110	Community Organizing: Beyond Mobilization, Volunteerism, and Outreach	\$595				
CB116SV	Working With Faith-Based Institutions in Community Development	\$385				
CB122	Mobilizing Youth for Community Building	\$300				
CB130	Sources of Power: Understanding Community Leadership <b>UPDATED!</b>	\$595				
CB153	Managing Volunteers to Develop Leaders and Build Community	\$300				
CB190	Reaching Your Community and Getting the Media on Your Side	\$595				
CB200	Community Engagement: Measuring its Impact	\$965				
CB205	Police-Community Partnerships: Building Relationships of Mutual Accountability	\$645				
CB225	Pathways to Self-Reliant Communities: Building on Our Assets	\$595				
CB270	Training Techniques: Designing and Facilitating Successful Training	\$595				
CB280	Training of Trainers for Community Health Leadership and Action <b>NEW!</b>	\$785				
CB310	Understanding the Politics of Policy	\$595				
<b>CONSTRUCTION AND REHAB</b>						
CP101	Affordable Housing Design and Construction Basics	\$645				
CP104	Sustainable and Resilient Materials and Methods of Construction	\$300				
CP141	Introduction to Sustainable Building	\$645				
CP189	Automate Rehab with Housing Developer Pro® 3.5	\$700				
CP255	How to Conduct a Rehab Home Inspection <b>UPDATED!</b>	\$945				

100 Level Fundamental course		200 Level Intermediate course		300-400 Level Advanced course		TUITION	DECEMBER				
							MON 9 TUES 10	WED 11	THURS 12 FRI 13		
FINANCIAL CAPABILITY, HOUSING EDUCATION AND COUNSELING (PRESENTED BY NCHEC)											
HO103	Lending Basics for Homeownership Counselors					\$1,030					
HO105	Compliance with State and Federal Regulations					\$645					
HO109	Foreclosure Basics for Homeownership Counselors					\$655					
HO110	Introduction to Housing Counseling					\$935					
HO111	Home Equity Conversion Mortgages					\$1,665					
HO200	Ready, Set, Prep: Tackling the HUD Counselor Exam Step by Step					\$935					
HO208	Building Skills for Financial Confidence					\$585					
HO209rq	Delivering Effective Financial Education for Today's Consumer					\$975					
HO210	Practice, Study, Success: Test Strategies for HUD's Counselor Certification Exam					\$645					
HO211	Credit Counseling for Maximum Results					\$915					
HO213	Fair Housing - What Professionals Need to Know					\$300					
HO220	Client Management and Tracking with CounselorMax®					\$1,045					
HO229	Homebuyer Education Methods: Training the Trainer					\$1,605					
HO247	Post-Purchase Education Methods					\$1,605					
HO248	Cracking the Code: HUD Compliance for Housing Counselors <b>UPDATED!</b>					\$645					
HO250	Homeownership Counseling Certification: Principles, Practices and Techniques, Part I					\$1,760					
HO255	Effective Approaches to Student Loan Counseling					\$645					
HO270	Senior Services for Housing Counselors					\$710					
HO274	Rental Housing Counseling Certification, Part 1 <b>NEW!</b>					\$1,030					
HO275	Intermediate HECM Counseling: Skills and Tools					\$735					
HO290	Being Green, Seeing Green: Counseling Clients to Maximize Energy Savings					\$300					
HO307	Advanced Foreclosure: Case Study Practicum					\$645					
HO310	Financial Coaching: Helping Clients Reach Their Goals					\$645					
HO324	Advanced Reporting and Customization for CounselorMax®					\$735					
HO345rq	Foreclosure Intervention and Default Counseling Certification, Part I					\$1,605					
HO360	Homeownership Counseling Certification for Program Managers and Executive Directors					\$1,605					
HO370	Financial Coaching Advanced Practicum: Taking Your Practice to the Next Level					\$975					
HO375	Financial Capability Program Design for Managers					\$645					
HO380	Compliance Check-up for HUD Counseling Program Managers and Executive Directors <b>NEW!</b>					\$1,030					
<b>HO935</b>	<b>SYMPOSIUM Expanding Financial Opportunities: Catapulting Communities Forward</b>					\$300					
NONPROFIT MANAGEMENT AND LEADERSHIP											
ML109	ABCs of Managing Projects and Collaborators <b>UPDATED!</b>					\$300					
ML120	Strategic Thinking and Planning					\$595					
ML125	Developing a Winning Business Plan					\$595					
ML130	Human Resources Management and Development					\$540					
ML220	The Art and Science of Group Facilitation					\$595					
ML236	Using Tableau to Visualize Impact and Tell Your Story					\$540					
ML242	Leading and Engaging an Equitable Organization					\$300					
ML243	Light Your Board on Fire!					\$540					
ML249	Sorting thru the Chaos: Effectively Managing Projects INTERMEDIATE <b>NEW!</b>					\$595					
ML252	Money and Mission: Ensuring Effectiveness and Sustainability through Successful Financial Leadership <b>UPDATED!</b>					\$585					
ML265	Clinic: Marketing Tactics for the Real World <b>UPDATED!</b>					\$300					
ML267	From Charity to Change: Empowering Your Community through Advocacy					\$595					
ML274	Exploring Excellence in Governance <b>NEW!</b>					\$300					
ML283	Advanced Negotiation: Mastering Difficult Conversations					\$595					
ML284	Influence Without Authority: Persuasion Skills You Never Knew You Had!					\$300					
ML287	Coaching Teams to Build Leadership					\$540					
ML292	Creating a Sustainable Nonprofit <b>UPDATED!</b>					\$540					
ML297	Leadership Tools for Achieving Excellence <b>UPDATED!</b>					\$300					
SINGLE-FAMILY AND SMALL BUSINESS LENDING											
LE141	Fundamentals of Micro and Small Business Underwriting					\$595					
LE210	USDA Rural Development Sec502 Direct Loans: Affordable Rural Homeownership					\$895					
LE241	Intermediate Underwriting for Micro and Small Business Lenders					\$595					

**\*SV** This course includes a site visit to a local community which may include walking and the use of public or private transport. Please identify any special needs (in accordance with American with Disability Act (ADA) when you register for this course.



# EXPANDING FINANCIAL OPPORTUNITY: CATAPULTING COMMUNITIES FORWARD



**It is a long held American belief** that financial opportunity exists for all who work hard enough. Yet, as we can see from the widening wealth gap – especially the wealth gap seen in communities of color - financial opportunity is not always simply a matter of individual effort. These efforts must be rooted in communities and systems that provide economic opportunity and access to all residents. For individuals to be able to make meaningful financial change in their lives they need to have access to the tools, resources and opportunities necessary for financial mobility.

So what does financial opportunity look like? What roles do community development and affordable housing practitioners play in creating opportunities for financial mobility? What strategies are working in communities across the country?

With so many Americans still struggling to make ends meet, individual supports like financial coaching and counseling are still vital in helping people seize opportunities and build financial health. How do we engage and empower people to build financial resilience and achieve financial goals? How do we engage diverse populations in a way that addresses their unique needs and speaks to their strengths? Hear about efforts happening across the country to empower people and inspire change.

**HEAR ABOUT  
EFFORTS HAPPENING  
ACROSS THE COUNTRY  
TO EMPOWER PEOPLE  
AND INSPIRE CHANGE**



### Important questions we'll examine throughout the day:

- What does it mean for an individual to have financial opportunity?
- What strategies are being used in communities across the country to remove barriers to wealth building and help people get ahead?
- What is the unique role of housing affordability in creating financial opportunity for individuals and communities?
- How do we engage key target populations in a way that addresses their unique needs and speaks to their strengths?

### Who is this event for?

- Professionals working across multiple sectors – community development, affordable housing, government, social services, financial services and philanthropy
- Professionals for all types of communities – urban, suburban and rural
- People working at all levels to support financial opportunity access – front line staff working directly with individuals, management and leadership overseeing financial capability services, and grant makers supporting these efforts

### What will you walk away with?

- Promising practices aimed at removing barriers to wealth building in communities
- Insight into innovative cross-sectoral approaches to building financial health
- Tools and approaches to reducing the racial wealth gap through thoughtful engagement with communities of color

**SYMPOSIUM: H0935**  
**WEDNESDAY, DECEMBER 11, 2019**  
**8:30 AM–4:00 PM**  
**OREGON CONVENTION CENTER**

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We make home possible®

**REGISTER TODAY AT [NEIGHBORWORKS.ORG/ONLINEREG](https://neighborworks.org/onlinereg)**



# AFFORDABLE HOUSING

### **AH183 Supportive Housing: Developing Solutions and Supporting Residents**

This course, designed by the Corporation for Supportive Housing, concentrates on funding specific to the development of supportive housing and reviews different models of providing supports to residents. It will look at increasing housing opportunities for the homeless, persons with chronic mental illness, and homeless Veterans as well as other special needs populations.

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

The Housing Development process can run into problems at almost any opportunity. This course will show you where many issues occur and how to resolve anything that comes up during development. Not all real estate development crises are predictable, but there are many instances where we should have seen it coming. These predictable surprises can happen in each phase of the development process and range from zoning and land uses issues, to subsidy program requirements, construction costs and partner agreements. This course will provide a review of the psychological, organizational and political barriers that prevent nonprofit organization's from identifying and addressing these predictable surprises. Through lecture, case studies and exercises you will learn how to recognize common threats to a development's successful completion, make them a priority and mobilize the resources required to stop it.

### **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 houses 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 to persons of modest means on a long-term basis by restricting the amount of equity that homeowners may 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.

For a complete list of course offerings for this institute, check out the course grid on pages 4 and 5. To read full course descriptions for each content area and to register online, visit [NeighborWorks.org/onlinereg](http://NeighborWorks.org/onlinereg)



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## ASSET MANAGEMENT

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

The Nuts and Bolts of Asset Management is a hands-on workshop that covers key asset management concepts and theories through practical real world case studies and exercises. The workshop includes exercises focusing on evaluating property performance against double-bottom line performance standards. Exercises include review and analysis of revenues, expenses, financial reports and audits, effective planning, tracking and reporting and an introduction to Low Income Housing Tax Credits and the connection between decisions at the development stage and the long term viability of the property. Class culminates with a property “workout” case study.

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

The Nuts and Bolts of Asset Management is a hands-on workshop that covers key asset management concepts and theories through practical real world case studies and exercises. The workshop includes exercises focusing on evaluating property performance against double-bottom line performance standards. Exercises include review and analysis of revenues, expenses, financial reports and audits, effective planning, tracking and reporting and an introduction to Low Income Housing Tax Credits and the connection between decisions at the development stage and the long term viability of the property. Class culminates with a property “workout” case study.

### **AM351 Advanced Housing Asset Management (CHAM)**

Advanced Housing Asset Management (AHAM) is the final course in the Certified Housing Asset Manager (CHAM) series. It is designed for participants who have completed or tested out of all of the other courses in the series (see the CHAM designation curriculum for details). This class will bring together all of the aspects of asset management covered through the CHAM curriculum. This course 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. Students will need to 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 1. have the opportunity to schedule one-on-one coaching from the instructors on their property asset management plan, and 2. present a Powerpoint summary of their property asset management plan via video-conferencing to a group of fellow participants for peer feedback and insights. Part II will conclude within 30 days of the commencement of Part I.

“Instructor did an absolute awesome job-very informative and helpful, very energetic and engaging.”

For a complete list of course offerings for this institute, check out the course grid on pages 4 and 5. To read full course descriptions for each content area and to register online, visit [NeighborWorks.org/onlineereg](http://NeighborWorks.org/onlineereg)



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# COMMUNITY ENGAGEMENT

### **CB116SV Working With Faith-Based Institutions in Community Development**

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

### **CB270 Training Techniques: Designing and Facilitating Successful Training**

Are you ready to design community learning events that are effective and successful? Come learn about the fundamental steps of training design and facilitation that create a path to learning and audience participation. Learn about the basic theories behind a participatory learning approach. Implement the eight step planning model and walk away with a written plan on how to build or redesign one of your community learning events. Understand the various learning styles and practice methods such as small groups, role plays, learning exercises, icebreakers, and other participatory techniques. Examine successful learning environments and discuss other training and facilitation best practices. Learn about ways to evaluate the success of learning events at different stages so they are successful and sustainable.

For a complete list of course offerings for this institute, check out the course grid on pages 4 and 5. To read full course descriptions for each content area and to register online, visit [NeighborWorks.org/onlinereg](http://NeighborWorks.org/onlinereg)



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## COMMUNITY ECONOMIC DEVELOPMENT

### 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. This versatile and essential tool for designing community development programs will help you to identify needed resources, actions, achievable outcomes and community impact. In this interactive course you will study the difference between inputs, activities, outputs, outcomes and impact, and practice your hand at designing Logic Models through interactive class exercises.

### ED215 So You Think You Want to Start a Social Enterprise?

Social enterprises are a new approach to meeting our most pressing social needs, combining the best attributes of the marketplace with the passionate commitment of the social sector. Social enterprises are mission-driven businesses that simultaneously generate earned revenue and social impact. REDF is a leader in providing funding and technical assistance to social enterprises that focus on hiring and assisting people who face barriers to work. As such, this course will also focus on this type of social enterprise.

This course is designed to give participants an understanding of social enterprise and the role it can play in addressing today's economic challenges. Through case studies, exercises, and group work, participants will learn what it takes to start and run a social enterprise. Over the course of 2 days, participants will use REDF's business development frameworks and lay the groundwork for developing their own social enterprise. In this interactive workshop, participants will develop an idea for a social enterprise, test the viability of their concept's financial performance and social impact potential, as well as plan for real-world implementation of their idea.

### ED255 Developing a Creative Economy Strategy in Your Community

What role do the arts and culture have in your community's economic development plan? Find out why the creative economy is one of the fastest growing sectors of economic development. Learn techniques to analyze your community's capacity for developing its creative economy as well techniques to develop innovative programming. Learn how to create and evaluate different creative economy strategies for maximum impact that will support the revitalization of your community. This is an interactive course that includes case studies, lecture, dynamic group exercises and interactive class discussions and a brief site visit.

For a complete list of course offerings for this institute, check out the course grid on pages 4 and 5. To read full course descriptions for each content area and to register online, visit [NeighborWorks.org/onlineereg](https://NeighborWorks.org/onlineereg)



PHOTO COURTESY OF TRAVEL PORTLAND



# COMMUNITY AND NEIGHBORHOOD REVITALIZATION

### **NR124SV Reading a Neighborhood: What a Walk Around the Block Can Tell You**

Learn how to quickly analyze what's going on in a neighborhood during a block walk. What can the housing stock and businesses tell you? The people on the street and the streetscape itself? Hone your observation skills and take home a system to analyze what you see and how your assumptions can color your observations. This course includes a site visit where participants take part in a block walk, perform an analysis and discuss their findings in terms of neighborhood revitalization. Participants will come away with a practical how-to guide for conducting a block walk in their own communities. The neighborhood tour requires fairly extensive walking. Wear comfortable shoes and dress appropriately for the weather. We often have lunch during the neighborhood tour, bring cash.

### **NR190 Leveraging Arts and Culture for Affordable Housing and Equitable Community Development**

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

For a complete list of course offerings for this institute, check out the course grid on pages 4 and 5. To read full course descriptions for each content area and to register online, visit [NeighborWorks.org/onlineereg](http://NeighborWorks.org/onlineereg)

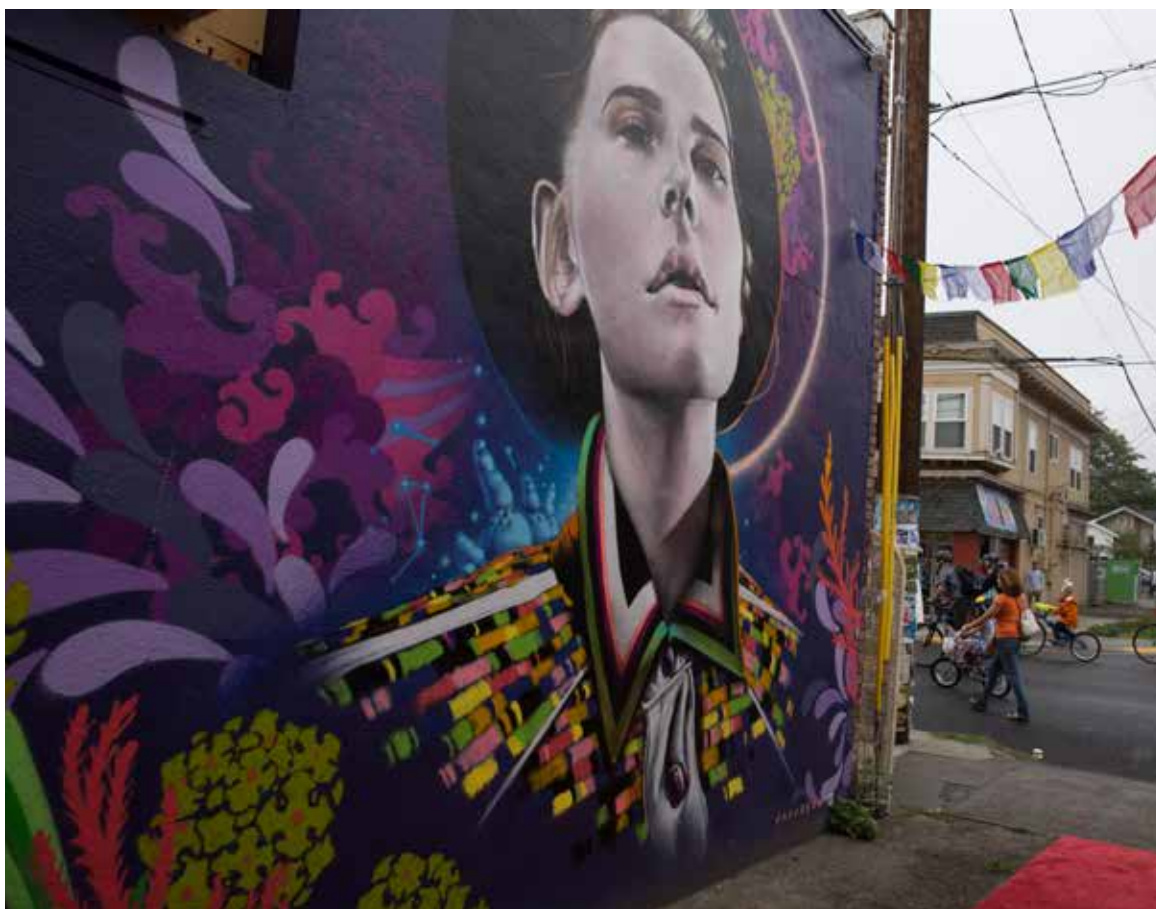


PHOTO COURTESY OF TRAVEL PORTLAND

## CONSTRUCTION AND REHAB

### **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 will learn the skills to properly conduct an inspection, including inspection challenges, the inspection process and routine, inspection forms, necessary inspection tools and how you should look, act and interact with the public. You will learn what items and systems you should be investigating and how to do a visual, non-invasive home inspection. In addition, the course will feature an interactive inspection process to help develop your skills. Attend this course and walk away with the essential skills and knowledge to conduct one of the most critical skills needed by any rehab/construction specialist. This is the first of two courses in the Housing Inspections one week certification. The second course is CP189 – Automate Rehab with Housing Developer Pro® 3.5.

### **CP189 – Automate Rehab with Housing Developer Pro® 3.5**

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 of 3.0 and also includes content for performing field inspections. Basic familiarity with Windows required. This is the second of two courses in the Housing Inspections one week certification.

For a complete list of course offerings for this institute, check out the course grid on pages 4 and 5. To read full course descriptions for each content area and to register online, visit [NeighborWorks.org/onlineereg](http://NeighborWorks.org/onlineereg)



PHOTO COURTESY OF TRAVEL PORTLAND



NeighborWorks Financial Capability training will give you the information and skills needed to empower your clients to take charge of their financial health and chart a path towards achieving financial goals.

# NEIGHBORWORKS FINANCIAL CAPABILITY TRAINING

## KNOWLEDGE

Financial education and consumer protection information provide clients with the knowledge, tools and resources needed to make sound financial decisions and improve their financial lives.

## CONFIDENCE

With effective counseling and coaching, clients are empowered to solve crises and emerge better equipped to manage debt and, in time, increase savings and handle life's unexpected events.

## CHANGE

Coaching services empower clients to visualize long-term financial goals and through the support of a coach create the concrete changes needed to achieve them.

[VISIT NEIGHBORWORKS.ORG/FINANCIALCAPABILITY](https://www.neighborworks.org/financialcapability) TO LEARN MORE.

**Our financial capability training helps coaches, counselors, management and leadership-level professionals design and deliver trusted, high-quality services grounded in the National Industry Standards for Financial Capability...**



Agencies that employ NCEC-certified Financial Capability professionals qualify to Adopt the new National Industry Standard for Financial Capability

**NEIGHBORWORKS** is the nation's leading provider of community development and financial capability training, offering hundreds of in-person and online courses to meet the varied needs of professionals across industries and across the country.

- In-person at national NeighborWorks Training Institutes
- In your community at local or regional "place-based" training events
- Online with interactive webinars, self-guided courses or faculty-led courses

**Discover more at [NeighborWorks.org/Training](https://www.neighborworks.org/Training).**

## EARN YOUR PROFESSIONAL CERTIFICATION IN FINANCIAL CAPABILITY

Earn your professional certification in financial capability. Our gold-standard certification equips counselors and coaches with the knowledge and skills to offer effective, engaging financial education, counseling and coaching that meets a range of consumer financial needs and provides impactful ways to deliver training.

Certification Benefits:

- Nationally recognized professional accreditation
- Access to proven approaches to building client financial skills, the latest consumer protection information and a full suite of consumer facing tools
- Offers peer to peer learning with faculty and practitioners who are leaders in the financial capability field
- Opens the door to continuing professional development opportunities"

Learn more at [NeighborWorks.org/NCEC/Certification](https://www.neighborworks.org/NCEC/Certification).



# FINANCIAL CAPABILITY, HOUSING EDUCATION AND COUNSELING

Presented by NeighborWorks Center for Homeownership Education and Counseling (NCHEC)

**Our diverse curriculum provides financial counselors and coaches and other community-focused service providers with a wealth of information, skills and turnkey solutions.**

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

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? Attend this 2-day course to gain the most useful and efficient tools to make a real difference in the lives of your clients. 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.

## **Delivering Effective Financial Education for Today's Consumer (H0209rq)**

This course addresses the fundamental components to successfully delivering a well-designed financial education program, starting with group education and the primary ways consumers behave with their money: visioning; maximizing income; spending; saving; borrowing and protecting. Participants explore growing industry trends surrounding comprehensive "financial capability" programs, lifestyle changes, counseling, coaching and measuring outcomes. Innovative strategies using a variety of delivery methods, including social media, will be explored, along with available resources.

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

Equipped with knowledge and the right tools, you can increase your ability to help clients (in individual or group sessions) build, improve, and maintain a good credit profile. Using sample credit files, you will sharpen your skills in reading and interpreting credit reports, identify and understand the factors that impact credit scores and learn the consumer rights and protection laws specific to credit counseling.

## **Effective Approaches to Student Loan Counseling (H0255)**

We've developed a course to train counseling professionals on how to help their clients plan for and meet the financial responsibility of this type of debt and to provide guidance to clients facing default—or in default—on their student loans. Obtain the knowledge you need to effectively explain repayment options and their terms. This course is a great opportunity for your organization to engage a new target audience and provides the tools you need to integrate these services into your existing counseling program.

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

Learn how coaching differs from and complements counseling, financial education and other services aimed at building consumers' financial security while you explore ways to incorporate coaching techniques into your financial capability program.

## **Financial Coaching Advanced Practicum: Taking Your Practice to the Next Level (H0370rq)**

In this follow-up course to Financial Coaching: Helping Clients Reach Their Goals (H0310), you will have many opportunities to put into practice the approaches and techniques you've culminated over time. As you start to hone your understanding of the models used in financial coaching and deepen your understanding of how to effectively help clients with cash flow, savings, reducing debt, rebuilding credit and protecting their assets. We will also explore coaching strategies that allow you to be of help to clients with complex personal situations.

## **Financial Capability Program Design for Managers (H0375)**

Program managers and executive directors, register now for our new course. Learn how to successfully execute financial capability program strategies for your unique target audience and lay the groundwork for everything from enrollment to measuring outcomes.

## **NCHEC TRAINING SCHOLARSHIPS**

A number of scholarships are available for Financial Capability, Housing Education and Counseling courses at this training institute and at other training events around the country. Most scholarships provide free tuition and lodging for eligible staff of 501(c)(3) organizations. To find out about these and other scholarship opportunities, go to [NeighborWorks.org/scholarships](http://NeighborWorks.org/scholarships).

Scholarships Courtesy of:



**CHASE**



**BB&T**

**FreddieMac**  
We make home possible®



# NCHEC MEETS THE NEEDS OF COUNSELING PROFESSIONALS TODAY



VISIT [NEIGHBORWORKS.ORG](http://neighborworks.org) FOR MORE DETAILED COURSE DESCRIPTIONS AND TRAINING INFORMATION.

*“I was in your class in Pittsburgh in December and I still had a lot of anxiety about this HUD Test. I just wanted to let you know that I passed my test the first time on January 4th!! I finished the test and had about 40 minutes left over so I went back over it two more times before I submitted it and still had 13 minutes left. It was not near as hard as what I had feared. Thank you both for all of your help in the preparation in passing this test.”*

Steven Rose, Housing Counseling Specialist  
Washington County Community Action Council

## Now Is The Time For HUD Counselors To Take Action

The exam for HUD Counselor Certification is now available and with a looming 2020 deadline, we can make sure you are best prepared to succeed. NeighborWorks America, one of the industry's most trusted and respected resources for professional training, offers comprehensive curriculum that thoroughly reviews the 6 core competencies for HUD Counselor Certification. Do you want to brush up on mortgage calculations? Need a refresher on the difference between a judicial and a non-judicial foreclosure? Sharpen your understanding in each of these areas and move closer to passing the exam and becoming a HUD Certified Counselor.

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

Get ready! Elevate your knowledge in the six essential competency areas, including financial management, housing affordability, homeownership, avoiding foreclosure, tenancy and fair housing. Set yourself up for success in meeting HUD's counselor certification requirements by starting your prep with this 3-day classroom course. 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 HUD counselor certification exam.

### Practice, Study, Success: Test Strategies For HUD's Counselor Certification Exam (H0210)

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 example test questions and learn test 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 H0200: Ready, Set, Prep: Tackling the HUD Counselor Exam Step by Step course is recommended as a companion course to help you master the content of the 6 counseling topic areas.*

## HUD Housing Counselor Certification Webinar Series

**Not able to attend in-person training right now? Join us for our HUD Certification series with six webinars dedicated entirely to one of the core competencies of the HUD exam.**

These offerings are:

- Housing Affordability: Building Competency in Housing Counseling [H0002wt]
- Fair Housing: Building Competency in Housing Counseling [H0003wt]
- Financial Management: Building Competency in Housing Counseling [H0004wt]
- Tenancy: Building Competency in Housing Counseling [H0005wt]
- Avoiding Foreclosure: Building Competency in Housing Counseling [H0006wt]
- Homeownership: Building Competency in Housing Counseling [H0007wt]

To learn about HUD certification or NCHEC certification visit, [www.neighborworks.org/nchec](http://www.neighborworks.org/nchec)

# ADVANCE YOUR CAREER WITH NCHEC CERTIFICATIONS

Hone your skills in the most timely and relevant specialty areas within the industry. With NeighborWorks Center for Homeownership Education and Counseling (NCHEC) certifications, you have a competitive advantage that demonstrates your commitment and know-how in your field.



## **Pre-Purchase**

### **Homeownership Education:**

Empowers you to effectively teach clients how to purchase a home, budget and sustain after purchase

## **Post-Purchase**

### **Homeownership Education:**

Helps you teach new homeowners the essentials of maintaining their homes and finances

## **Homeownership Counseling:**

Focuses on individual counseling to address personal finances, homeownership, and foreclosure

### **Foreclosure Intervention and Default Counseling:**

Delivers key information about the default and foreclosure process in addition to methods for building program capacity

## **Homeownership Counseling for Program Managers and Executive Directors:**

Provides approaches to diversifying funding sources, management of counseling staff; and other programmatic essentials

## **Financial Capability:**

Provides the skillset needed to grow client capacity to take charge of their financial health

## **NEW! Rental Housing Counseling:**

Helps design or improve rental programs including fair housing and subsidized tenancy programs

**The National Industry Standards For Homeownership Education and Counseling are a Set Of Guidelines For Quality Homeownership and Counseling Services. Industry Professionals Who Adopt These Standards Can Be Trusted To Provide Consistent, High Quality Advice.**

The Standards represent a baseline of quality for homeownership and foreclosure intervention education and counseling. Organizations adopt the Standards to demonstrate their commitment to the needs of their clients and communities while promoting sustainability for their organizations.

Housing counseling agencies wishing to adopt the Standards can do so if their counselor hold certifications in these four areas by the NeighborWorks Center for Homeownership Education & Counseling (NCHEC):

- Pre-Purchase Homeownership Education (required course: HO229)
- Post-Purchase Homeownership Education (required course: HO247)
- Homeownership Counseling (required courses: HO250 and HO109 or HO109el)
- Foreclosure Intervention & Default Counseling (required courses: HO345 and HO307 or HO307vc)
- Financial Capability (required courses: HO209, HO310, and HO208 or HO208el)
- Rental Housing Counseling (required courses: HO274 and HO208 or HO208el)

Launched in May 2007, today over 1,000 housing counseling agencies from all fifty states, DC, and Puerto Rico are Adopters of the Standards.



## **Announcing NCHEC's new specialized certification in RENTAL HOUSING COUNSELING!**

Complete the courses HO208 and HO274 to obtain this certification. Agencies with NCHEC-certified Rental Counselors will also qualify for Adoption of the new National Industry Standards for Rental Housing Counseling. **Sign-up today!**

**TO LEARN MORE ABOUT THE STANDARDS AND HOW TO ADOPT THEM, VISIT [WWW.HOMEOWNERSHIPSTANDARDS.ORG](http://WWW.HOMEOWNERSHIPSTANDARDS.ORG)**



# OFFER YOUR CUSTOMERS THE BEST SUPPORT IN THEIR HOMEBUYING JOURNEY

*Realizing the American Dream is the premier homebuyer tool. With information on mortgage disclosures, consumer protection, tools and other housing industry changes, this manual is the ultimate resource that answers questions and delivers results for homebuyer education programs.*

## Realizing the American Dream 5th Edition

The fifth edition offers page-by-page impact—providing easy-to-use worksheets and key information for new and prospective homebuyers to consider throughout the homebuying process. There's no better way to prepare your customers for their journey into homeownership than with updated, detailed and reliable insight on:

- Understanding credit
- Shopping for a home
- Securing a loan
- Managing finances
- Building towards financial goals

Realizing the American Dream is available in English and Spanish.



## YOU MAY ALSO BE INTERESTED IN:

### Realizing the American Dream, Trainer's Toolbox, 5th Edition\*

This PDF teaching companion to the consumer manual, helps you walk prospective homeowners through the entire home-buying process—from managing money and understanding credit to securing a mortgage loan and shopping for a home.

**\*THIS IS A DOWNLOADABLE DIGITAL PRODUCT CONTAINING A PDF AND CUSTOMIZABLE POWERPOINT PRESENTATION**

### Keeping the American Dream

An essential guide for homeowners, Keeping the American Dream provides easy-to-understand instruction and valuable advice to equip homeowners with the skills they need to remain secure in their new home purchase. This guide includes key information on community building, remaining on the path to creating equity and wealth as well as maintaining and improving a home. Presented in a user-friendly format, the guide features tips, checklists and interactive exercises.

Keeping the American Dream is available in four languages: English, Spanish, Chinese and Vietnamese.



**To purchase one of these publications visit <https://www.neighborworksstore.org> today!**



We have homeownership counselors covered. Online.  
[www.CounselorMax.com](http://www.CounselorMax.com)

## HARNESS THE POWER OF ACCURATE, EFFICIENT CLIENT MANAGEMENT AND REPORTING IN OUR COUNSELORMAX COURSES

Organizations and professionals who have completed CounselorMax training know how to:

- Meet Form HUD-9902 reporting requirements with CounselorMax
- Create and analyze Management Reports to optimize their services
- Successfully manage their pipelines
- Demonstrate their organization's impact to prospective funders

### **Client Management and Tracking with CounselorMax (H0220)**

New CounselorMax users, learn to create and manage client files, data entry requirements and automated case management activities. This course will give you the skills to efficiently show the positive impact of your counseling program, monitor business activities, plan according to your pipeline, and complete HUD 9902 reporting.

### **Advanced Reporting and Customization for CounselorMax (H0324)**

This computer lab course teaches experienced CounselorMax users how to customize data points, create customized reports and illustrate your organization's impactful results. At course end, you will be a master at working with the HUD 9902 data fields; in-depth NFMC reporting; the NeighborWorks America Quarterly Report; and Management Reports. Prerequisite: H0220, preferably at a prior training event.

### **Coming March 2020...NeighborWorks Compass™**

NeighborWorks America is excited to launch a modern customer management system, built on world-class Salesforce technology, to meet the unique needs of the housing counseling and community development industry. This groundbreaking new system will deliver the tools and resources you and your organization need to better support the families and communities you serve.

Find out more at: [Find out more at: www.NeighborWorks.org/NeighborWorksCompass](http://www.NeighborWorks.org/NeighborWorksCompass)

## SUCCESS MEASURES®

### MEASURE THE OUTCOMES OF YOUR FINANCIAL CAPABILITY PROGRAMS!

The Success Measures® suite of evaluation services and tools are essential in tracking the strides clients make towards improving their financial health. With more than 100 financial capability measurement tools to choose from, your organization can evaluate a range of initiatives and capture the changes in people's lives that make a difference, including attitudes and behaviors. With tools carefully developed for both adults and youth, you can gather information about important topics such as managing debt, paying bills, predicting expenses and the more informal social networks and exchanges that exist in the community.

The Success Measures Financial Capability Tools are available for download at no cost: [www.Successmeasures.org/fctools](http://www.Successmeasures.org/fctools)

#### **Categories of Financial Capability Tools:**

- Individual/Family/Household Background
- Individual/Family/Household Financial Status
- Financial Behavior
- Financial Attitudes
- Non-Financial Aspects of Well-Being and Security
- Social Networks

Learn about how all Success Measures tools, technology and services can greatly enhance your evaluation strategies, data collection and analysis, and help you to communicate your results. [Successmeasures.org](http://Successmeasures.org)

### NONPROFIT MANAGEMENT AND LEADERSHIP

#### **ML249 Sorting thru the Chaos: Effectively Managing Projects INTERMEDIATE**

If you're ready to amp up your project management skillsets, this course is designed for you. This intermediate course is designed for professionals regularly managing projects as a part of their job. This two-day intermediate course explores the 10 project management processes that support successful project initiation, planning, execution, and monitoring. Regardless if you are managing development, fundraising, programming, or community projects, effective project managers use proven practices to manage the key resources of people, process, and knowledge. Integrating hands-on activities, discussions, case studies, and individual exercises, this course explores standards of the Project Management Institute, emphasizing social sector and nonprofits needs, including: diverse stakeholder needs, planning strategies, and communication skills in applying standard project management processes to nonprofit and community projects. This intermediate course results from NTI participant requests, so bring your current or upcoming project and get ready to explore tools that will help you successfully initiate, plan, execute, and monitor it! **INTERMEDIATE COURSE**

#### **ML267 From Charity to Change: Empowering Your Community through Advocacy**

This advanced session will build your knowledge, skills and confidence to effectively engage in advocacy – at any level – in order to influence decision makers and change systems. Community development organizations are particularly well positioned for advocacy because of your first-hand experience with the issues, relationships with people on the ground and in the halls of power, and credibility in your community. Yet, few take full advantage of this opportunity. Over the two days together, we will debunk myths and clarify the legal rules on advocacy, demystify how to craft an advocacy strategy that works for your issue and organization and engages both staff and board, and get real about how to build a culture for advocacy across your organization. We'll also explore the ways that strategic and effective advocacy can build capacity for your organization – by bringing attention to your issues, raising your public visibility, and positioning your organization as a resource and leader.

#### **ML274 Exploring Excellence in Governance**

As the nonprofit sector has matured and adapted in the last decade, there has been a growing interest in boards of directors moving from traditional, technical oversight to a more strategic - and even generative - model of governance. The technical board most often identifies the nonprofit's current opportunities and challenges in terms of today's data and circumstances. The strategic board sets direction and designs solutions, and the generative board seeks opportunities to re-imagine future possibilities and impact. This one-day course explores the shift from governance as compliance and monitoring to governance as strategic thinking and creative engagement. The course also examines the experiences of graduates of four rounds of NeighborWorks America's Excellence in Governance (EIG) program. We will explore if and how EIG tools/concepts - including participation by leadership teams comprised of CEO and board members, development of a board governance challenge, and the use of leadership coaching and peer learning – changed the governance landscape. **IDEAL PARTICIPANTS:** Exploring Excellence in Governance is designed for nonprofit board leaders and members as well as nonprofit CEOs and executives who work closely and collaboratively with board members.

For a complete list of course offerings for this institute, check out the course grid on pages 4 and 5. To read full course descriptions for each content area and to register online, visit [NeighborWorks.org/onlineereg](http://NeighborWorks.org/onlineereg)



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## SINGLE-FAMILY AND SMALL BUSINESS LENDING

### LE141 Fundamentals of Micro and Small Business Underwriting

This course is designed to give all lending practitioners a strong foundation in the underwriting of micro and small businesses, whether they have little or no experience or would like a refresher. Participants will learn and employ the analysis techniques of finance professionals—the five Cs of credit. Participants will analyze financial statements and other types of financial information using a variety of commonly used financial ratios and will discuss both the benefits and limitations of these methods. Participants will learn how to structure loans to mitigate different types of risks. This course will be highly interactive, allowing participants to relate their own lending experiences to the case studies and other examples that will be used in class. Emphasis will be placed on working in groups so participants can be exposed to the analysis techniques and lending philosophy of others in the private nonprofit sector.

### LE241 Intermediate Underwriting for Micro and Small Business Lenders

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

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# NEIGHBORWORKS NETWORK ORGANIZATIONS

If the name of your organization is listed on this page, please complete the Registration Form for NeighborWorks Network Participants on page 31.

AEON  
Affordable Housing Education and Development, Inc.  
Affordable Homes of South Texas, Inc.  
Affordable Housing Alliance, Inc.  
Affordable Housing Resources, Inc.  
AHC Inc.  
Alamo Community Group  
Arbor Housing and Development  
Asian Americans for Equality  
Atlanta Neighborhood Development Partnership, Inc.  
Avenue Community Development Corporation  
Avesta Housing Development Corporation  
A Community of Friends  
BCL of Texas  
Beyond Housing / Neighborhood Housing Services of St. Louis  
Better Family Life, Inc.  
Better Housing Coalition of Richmond, VA  
Cabrillo Economic Development Corp.  
Cambridge Neighborhood Apartment & Housing Services, Inc.  
CASA of Oregon  
CATCH Neighborhood Housing  
Centro Campesino Farmworker Center, Inc.  
Champlain Housing Trust  
Charlotte-Mecklenburg Housing Partnership, Inc.  
Chattanooga Neighborhood Enterprise, Inc.  
Chautauqua Home Rehabilitation and Improvement Corp.  
CHWC, Inc.  
Chicanos Por La Causa, Inc.  
Chinatown Community Development Center  
Clearwater Neighborhood Housing Services, Inc.  
Coachella Valley Housing Coalition  
Coalition for a Better Acre  
Coastal Enterprises, Inc. (CEI)  
Codman Square Neighborhood Development Corp.  
Comite de Bien Estar, Inc.  
CommonBond Communities  
Community Action Partnership of North Alabama, Inc.  
Community Action Project of Tulsa County  
Community Concepts, Inc.  
Community Development Corporation of Brownsville, Inc.  
Community Development Corporation of Long Island, Inc.  
Community Frameworks  
Community Housing Development Corp. of North Richmond  
Community Housing Improvement Program  
Community Housing Initiatives  
Community Housing Partners Corporation  
Community HousingWorks  
Community Resources and Housing Development Corp.  
Community Service Programs of West Alabama, Inc.  
Community Ventures Corporation  
CommunityWorks In West Virginia, Inc.  
CommunityWorks North Dakota  
Connecticut Housing Partners  
Corporation to Develop Communities of Tampa  
Crawford-Sebastian Community Development Council, Inc.  
Dayton's Bluff Neighborhood Housing Services, Inc.  
DHIC, Inc.  
Downstreet Housing and Community Development  
Durham Community Land Trustees  
Dwelling Place of Grand Rapids Nonprofit Housing Corporation  
East Akron Neighborhood Development Corporation Inc.  
East Bay Asian Local Development Corporation (EBALDC)  
Eastern Eight Community Development Corporation  
Eden Housing, Inc.  
Fairbanks Neighborhood Housing Services, Inc.  
FAHE, Inc.  
Famicos Foundation  
Fifth Avenue Committee Inc.  
Fifth Ward Community Redevelopment Corp  
Foundation Communities  
Frontier Housing, Inc.  
GROW South Dakota  
Habitat for Humanity of Michigan  
Hawaii HomeOwnership Center  
Hispanic Housing Development Corporation  
Home Ownership Center of Greater Cincinnati  
Home Headquarters, Inc.  
HomeOwnership Center, Inc.  
Homeport  
HomeSight  
HomeSource East Tennessee  
Hope Enterprise Corp.

Homewise, Inc.  
Housing Development Corporation MidAtlantic  
Housing Development Fund, Inc.  
Housing and Neighborhood Development Services, Inc.  
Housing Assistance Program of Essex County, Inc.  
Housing Partnership for Morris County  
Housing Partnership, Inc.  
Housing Resources of Western Colorado  
Housing Resources, Inc.  
Hudson River Housing, Inc.  
Impact Seven, Inc.  
Interfaith Community Housing of Delaware, Inc.  
Ithaca Neighborhood Housing Services, Inc.  
Kalamazoo Neighborhood Housing Services, Inc.  
Kennebec Valley Community Action Program Housing Services  
LaCasa, Inc.  
La Casa de Don Pedro, Inc.  
Lakes Region Community Developers  
Lawrence CommunityWorks, Inc.  
Lighthouse of Oakland County  
Little Dixie Community Action Agency  
Low Income Housing Institute  
LTSC Community Development Corporation  
Madison Park Development Corporation  
Manna, Inc.  
Mennonite Housing Rehabilitation Services, Inc.  
Metro Community Development, Inc.  
Mid Central Community Action  
Mid City Redevelopment Alliance, Inc.  
Midwest Minnesota Community Development Corporation  
Montgomery Housing Partnership, Inc.  
Mountain Housing Opportunities, Inc.  
Mutual Housing Association of Greater Hartford, Inc.  
Mutual Housing Association of Hawaii, Inc.  
Mutual Housing California  
National Council on Agricultural Life and Labor Research Fund, Inc.  
Native Partnership for Housing, Inc.  
Neighbor to Neighbor, Inc.  
Neighborhood Development Services  
Neighborhood Finance Corporation  
Neighborhood Housing & Development Corporation  
Neighborhood Housing Partnership of Greater Springfield, Inc.  
Neighborhood Housing Services of Baltimore, Inc.  
Neighborhood Housing Services of Birmingham, Inc.  
Neighborhood Housing Services of Chicago, Inc.  
Neighborhood Housing Services of Greater Berks, Inc.  
Neighborhood Housing Services of Greater Cleveland, Inc.  
Neighborhood Housing Services of Hamilton, Inc.  
Neighborhood Housing Services of Kansas City, Inc.  
Neighborhood Housing Services of Los Angeles County  
Neighborhood Housing Services of New Britain, Inc.  
Neighborhood Housing Services of New Haven, Inc.  
Neighborhood Housing Services of New Orleans, Inc.  
Neighborhood Housing Services of New York City, Inc.  
Neighborhood Housing Services of Oklahoma City, Inc.  
Neighborhood Housing Services of Phoenix, Inc.  
Neighborhood Housing Services of South Florida, Inc.  
Neighborhood Housing Services of Southern Nevada, Inc.  
Neighborhood Housing Services of Southwest Wisconsin, Inc.  
Neighborhood Housing Services of the Inland Empire, Inc.  
Neighborhood Housing Services of the Lehigh Valley, Inc.  
Neighborhood Housing Services of Waterbury, Inc.  
Neighborhood of Affordable Housing, Inc.  
Neighborhood Partnership Housing Services  
NeighborImpact  
NeighborWorks Alaska  
NeighborWorks Badgerland  
NeighborWorks Boise  
NeighborWorks Blackhawk Region  
NeighborWorks Blackstone River Valley  
NeighborWorks Columbus (GA)  
NeighborWorks Community Partners  
NeighborWorks Dakota Home Resources  
NeighborWorks of Grays Harbor County  
NeighborWorks Great Falls  
NeighborWorks Green Bay  
NeighborWorks Home Partners  
NeighborWorks Home Solutions  
NeighborWorks HomeOwnership Center Sacramento Region  
NeighborWorks Laredo  
NeighborWorks Lincoln  
NeighborWorks Montana

NeighborWorks Mountain Country Home Solutions  
NeighborWorks New Horizons  
NeighborWorks Northeast Nebraska  
NeighborWorks Northeastern Pennsylvania  
NeighborWorks Orange County  
NeighborWorks Pocatello  
NeighborWorks of Western Vermont  
NeighborWorks Salt Lake  
NeighborWorks Southern Colorado  
NeighborWorks Southern Mass  
NeighborWorks Southern New Hampshire  
NeighborWorks Toledo Region  
NeighborWorks Umpqua  
NeighborWorks Waco  
NeighborWorks Western Pennsylvania  
Nevada H.A.N.D., Inc.  
New Directions Housing Corporation  
New Jersey Community Capital  
New Kensington Community Development Corporation  
NW HomeStart, Inc.  
North East Community Action Corporation  
Northwest Michigan Community Action Agency, Inc.  
Nueces County Community Action Agency  
Nuestra Comunidad Development Corp.  
Oak Hill Community Development Corp.  
ONE Neighborhood Builders  
One Roof Community Housing  
Opportunities for Chenango, Inc.  
Origin SC  
Orlando Neighborhood Improvement Corp.  
Pathfinder Services, Inc.  
PathStone  
Pensacola Habitat for Humanity  
Peoples' Self-Help Housing Corporation  
Penquis Community Action Program, Inc.  
Ponce Neighborhood Housing Services, Inc.  
Portland Housing Center  
Providence Community Housing  
Puerto Rico Neighborhood Housing Services Corp  
REACH Community Development, Inc.  
Rocky Mountain Communities  
RUPCO, Inc.  
Rural Communities Housing Development Corporation  
RuralEdge  
Rural Enterprises of Oklahoma, Inc. (REIOK)  
Rural Neighborhoods, Inc.  
Salisbury Neighborhood Housing Services, Inc.  
Self-Help Enterprises  
South Bend Heritage Foundation  
Southern Mutual Help Association  
Southwest Minnesota Housing Partnership  
Southwest Solutions  
St. Ambrose Housing Aid Center  
St. Joseph's Carpenter Society  
St. Mary Development Corporation  
Tallahassee Lenders' Consortium  
Tampa Bay Community Development Corporation  
Tejano Center for Community Concerns  
Tenderloin Neighborhood Development Corp (TNDC)  
The Housing Partnership, Inc.  
The Neighborhood Developers, Inc.  
The Neighbor Project  
The Primavera Foundation, Inc  
The Unity Council  
Thistle Communities  
Tierra del Sol Housing Corporation  
TRELLIS  
Tri-County Housing & Community Development Corporation  
Troy Rehabilitation & Improvement Program, Inc.  
Twin Cities Community Development Corp.  
UNHS NeighborWorks HomeOwnership Center  
United Housing, Inc.  
Universal Housing Development Corporation  
Urban Edge Housing Corporation  
Way Finders, Inc.  
Wealth Watchers, Inc.  
West Elmwood Housing Development Corp.  
Westside Housing Organization, Inc.  
Willamette Neighborhood Housing Services  
Windham & Windsor Housing Trust  
Wyoming Housing Network

# PROFESSIONAL CERTIFICATES

An investment in your future that  
will pay off for you, as well as those  
you serve



## PROFESSIONAL CERTIFICATES PROGRAM

NeighborWorks offers professional certificates in eight content areas that equip you with critical knowledge and skills, and make you a better candidate for career advancement. The certificates are rigorous, while still allowing you to tailor your learning to meet your unique professional needs and interests. Certificates are awarded to candidates who successfully complete the required and elective coursework, practical exercises, tests for each course (if applicable) and a final exam or comprehensive practical assignment. Depending on the content area, you can earn your professional certificate in as few as three training institutes.

**Enroll in the Professional Certificate Program by visiting our website [NeighborWorks.org/careerenhancement](https://neighborworks.org/careerenhancement); and complete and submit the enrollment form.**

### Affordable Housing

- Funding and Finance
- Project Management

### Asset Management (CHAM™)

### Community Economic Development

### Community and Neighborhood Revitalization

### Community Engagement

### Construction and Rehab

### Homeownership and Community Lending

### Nonprofit Management and Leadership

- Organizational Leadership
- Organizational Management

## ONE-WEEK SKILL CERTIFICATIONS

### The fastest path to a deeper skill set.

With limited time and budget, you need an efficient way to build your professional skill set. These one-week certifications are an ideal way to build competency in a specific subject matter area, and earn a certificate that will enhance your credentials. Best of all, these one-week certifications can typically be applied toward our more comprehensive professional certificate program, which significantly improves your professional standing.

### Affordable Housing

- Fundamentals of Affordable Housing Development
- Federal Financing for Affordable Housing Development

### Community Economic Development

- Economic Development Foundations
- MicroEnterprise Development

### Community Engagement

- Resident Leadership Trainer

### Construction and Rehab

- Construction Basics
- Housing Inspections
- Construction Management

### Nonprofit Management and Leadership

- Coaching
- Financial Management
- Marketing and Branding
- Resource Development

**FOR INFORMATION AND CERTIFICATION ENROLLMENT, VISIT OUR WEBSITE  
[NEIGHBORWORKS.ORG/CAREERENHANCEMENT](https://neighborworks.org/careerenhancement)**

**TO LEARN ABOUT NCHEC CERTIFICATION REQUIREMENTS, VISIT [NEIGHBORWORKS.ORG/NCHEC/CERTIFICATION](https://neighborworks.org/nchec/certification)**





# BRINGING NEIGHBORWORKS TRAINING TO YOUR COMMUNITY

## PLACED-BASED TRAINING

### **Minimum cost, maximum customization**

Want to build a customized training event that conveniently and cost-effectively delivers NeighborWorks courses in your own community, for your own staff and partners? Explore the flexible, reasonably priced possibilities of our “place-based” regional/local training. We’ll work with you to develop a made-to-order training experience that delivers the same high-quality knowledge- and skill-building you enjoy at our national institutes. You’ll minimize your travel costs, maximize your training budget, and learn exactly what you need to learn together with your community partners.

Arranging your place-based event is easy. You can create a program by selecting one or more courses from our comprehensive catalog ([NeighborWorks.org/coursecatalog](https://NeighborWorks.org/coursecatalog)). Fees are based on the specific courses and number of training days—significantly lower than comparable training market rates, and the cost of sending multiple learners to a Training Institute with often steep travel expenses. We can scale services up or back according to your unique needs: from simply sending a trainer and materials for a single course, to building a tailor-made event with multiple courses.

Gaining the knowledge, skills and tools you need for increased impact has never been so personalized—or stress-free!

**FOR MORE INFORMATION GO TO [NEIGHBORWORKS.ORG/PLACEBASEDTRAINING](https://NeighborWorks.org/PLACEBASEDTRAINING).**



# ONLINE TRAINING WITH NEIGHBORWORKS

A convenient, cost-effective way to build your skills, enhance your impact and grow your career

*NeighborWorks America's online training offerings let you stay close to your work while gaining the same valuable skills and knowledge offered at our highly rated in-person training events. You can arrange your professional development around your busy schedule, and best of all, save your valuable travel dollars and time away from the office. Our courses help you cultivate skills and knowledge you can put into action right away, so you can start doing even better work for the communities you serve, sooner!*

*Offered in three formats, Online Training addresses the latest challenges and opportunities in a wide array of community development, affordable housing, and nonprofit management topics, always growing and evolving to meet your needs. We offer training for professionals at all levels—from entry level to expert—so you can be sure you're getting a high-quality learning experience that keeps you at the forefront of your work.*

## **INTERACTIVE WEBINARS**

Our 90-minute interactive webinars are the most time-efficient and cost-effective training option for professionals looking to stay up-to-date on the latest best practices and pick up specific skills from our expert faculty.

## **SELF-GUIDED COURSES**

Composed of individual pieces of content you can move through at your own pace, self-guided courses enable you to gain relevant skills and dig deeper into the specific content that makes the most sense for you—reinforced with downloadable tools and resources.

## **FACULTY-LED COURSES**

Designed to present complex material that is best learned with the guidance of an expert and the support of your peers, faculty-led courses provide a comprehensive professional development experience comprising weekly live sessions and self-paced assignments, supported by online learning tools and collaboration. You'll take a deep dive into critical topics, receive instruction and feedback specific to your challenges, and work with peers—all without leaving your home or office.

**TO FIND OUT MORE AND REGISTER, VISIT [NEIGHBORWORKS.ORG/ONLINETRaining](https://neighborworks.org/onlinetraining).**

# REGISTRATION AND ACCOMMODATION INFORMATION FOR NON-NEIGHBORWORKS ORGANIZATIONS, PORTLAND, OR

## PRE-EVENT REGISTRATION

Submit the registration form by the early raffle deadline of October 21 or by no later than November 18. After this date, participants wishing to take courses at this event must wait to enroll during the onsite registration. To register for courses, locate the classes you wish to take and indicate your first and second choices for each day on the registration form. Use both course letters and numbers. Also, list the tuition for each first choice course only. Complete the registration form and mail or fax it to NeighborWorks America. Register early; classes fill up quickly, and we cannot guarantee onsite or late registrants the classes of their choice. We recommend you do not confirm your travel and accommodations until you receive confirmation of your enrollment in selected courses.

## ONLINE REGISTRATION

Instead of mailing or faxing a registration form, consider signing up through our online registration system. Participants choosing to use the online system will be able to access their online transcript history, update profile information, streamline payment transactions and make course registration changes. Access the online registration tool at [NeighborWorks.org/onlineereg](http://NeighborWorks.org/onlineereg). As a first time user to this online tool, you will need to create a user profile before registering.

## ONSITE REGISTRATION

Onsite registration opens on December 8, 2019 at 3 p.m. Check daily hours of operation onsite. All participants must stop by the onsite registration to pick up their registration packets before attending courses. Your packet will have the most updated information about courses, locations and events.

## PAYMENT POLICY

Institute courses and symposia are individually priced. Tuition fee include courses, materials and site visits (where applicable), afternoon workshops, networking opportunities, light daily continental breakfast and refreshments. Payment is due with your registration form and may be made by check, Visa, MasterCard or American Express.

If your organization requires a purchase order, we will bill you and hold your registration form until November 18, to allow for receipt of payment. All tuition and registration payments must be received in full before obtaining a confirmation packet prior to the event.

## REFUND/CANCELLATION POLICY

Notice of cancellation must be received by November 18 to receive a full tuition refund. If cancellation notice is received after November 18 and up to 5 days before the start of the event, NeighborWorks America will assess a \$150 cancellation fee and provide a tuition credit voucher for the balance. The credit voucher expires if not used within one year of issuance. If a cancellation notice is received less than five business days prior to the event, or if you do not complete your coursework, no refund or credit voucher will be issued. NeighborWorks America reserves the right to cancel any course at any time. If your course is canceled, you may choose another course or request a tuition refund. Other than refunding your tuition in the event that the course you chose is cancelled, NeighborWorks America is not liable to you for any other damages, including, without limitation, any obligation to provide a refund for any travel and/or lodging costs associated with attending any NeighborWorks event or other direct, indirect or consequential damages.

**Pay full price for a week of training for two people in your organization — minimum \$1,150 per person — and you can bring a third learner from your organization for free. There are no course restrictions but all three learners must be from the same organization.**

- 1. Register learners online at [NeighborWorks.org/onlineereg](http://NeighborWorks.org/onlineereg), and then call us at (800) 438-5547 to have the fee waived for your free learner.**
- 2. Fill out the registration form in this brochure, or available online at [www.neighborworks.org/training](http://www.neighborworks.org/training), and fax all three together to us at (800) 834-3758. Be sure to include credit card information for the two paid learners, and write "FREE OFFER" in the payment section of your third learner.**



## SUBSTITUTION POLICY

Substitution requests will be accepted up to November 18 and requests are subject to course availability.

## SCHOLARSHIPS

Limited scholarship assistance may be available to nonprofit organization staff, board members and volunteers. For more information, visit [NeighborWorks.org/scholarships](http://NeighborWorks.org/scholarships). If you are awarded a scholarship and do not cancel or are a no-show to the event, your scholarship eligibility may be revoked for 12 months.

## ACCOMMODATIONS

If your lodging is not covered by NeighborWorks America, you will be able to make your own lodging reservation at the following hotels below. Instructions will be provided in your Event Confirmation Packet once your registration is confirmed.

### HILTON PORTLAND DOWNTOWN

921 SW Sixth Street  
Portland, OR 97204  
Hotel room rate: \$167 single room occupancy

### DOUBLETREE BY HILTON HOTEL PORTLAND

1000 NE Multnomah Street  
Portland, OR 97232  
Hotel room rate: \$159 single room occupancy

**Quoted hotel rates are subject to change without notice.**

A number of sleeping rooms are available for institute participants on a first-come, first-served basis at the special rate plus an additional percentage for city, county and lodging tax. Reservations must be made by November 18, 2019. Please review your Travel and Logistics Guide (TLG) and your Event Confirmation Letter for specific details regarding your registration and course information. There are many fraudulent companies who may contact institute participants and represent themselves as a "housing bureau" or something of the like, and may ask for credit card numbers. These companies are NOT authorized by us!

**REGISTER BY OCTOBER 21 AND YOU'LL BE INCLUDED IN A RAFFLE TO WIN A KINDLE\*.**

\*may not be exchanged for tuition credit or monetary value.

## SPECIAL NEEDS

If you have special needs addressed by the Americans with Disabilities Act, notify us at least one month prior to the event.

## ATTENDANCE AND CERTIFICATE POLICY

Courses start promptly and conclude on time, except for Friday, when courses end at 2:30 p.m. Certificates of completion are awarded only to participants who attend and complete 100% of the course.

## PHOTO, AUDIO AND VIDEO RECORDING RELEASES

By entering the event premises, you consent to interview(s), photography, audio recording, video recording and its/their release, publication, exhibition, or reproduction to be used for news, web casts, promotional purposes, telecasts, advertising, inclusion on websites, or any other purpose by NeighborWorks America and its affiliates and representatives. You waive all rights you may have to any claims for payment or royalties in connection with any exhibition, streaming, web casting, televising, or other publication of these materials, regardless of the purpose or sponsoring of such exhibiting, broadcasting, web casting, or other publication irrespective of whether a fee for admission or sponsorship is charged. You also waive any right to inspect or approve any photo, video, or audio recording taken by NeighborWorks America or the person or entity designated to do so by NeighborWorks America. You release NeighborWorks America, its officers and employees, and each and all persons involved from any liability connected with the taking, recording, digitizing, or publication of interviews, photographs, computer images, video and/or sound recordings.

## CUSTOMER SERVICE

**Call: (800) 438-5547**

**Fax: (800) 834-3758**

**Email: [nti@nw.org](mailto:nti@nw.org)**

**Online Registration available — [NeighborWorks.org/onlineereg](http://NeighborWorks.org/onlineereg)**



# REGISTRATION FORM FOR NON-NEIGHBORWORKS ORGANIZATIONS, PORTLAND, OR

**Register for this Training Institute online at [NeighborWorks.org/onlineereg](http://NeighborWorks.org/onlineereg) OR mail or fax this form to the NeighborWorks Training Institute.**  
(Please print or type. Illegible or incomplete forms delay the registration process.)

Preferred First Name On Your Badge \_\_\_\_\_

☐ Mr. ☐ Ms. Last Name \_\_\_\_\_ First Name \_\_\_\_\_  
(Optional) (TSA Secure Flight, provide your legal name, exactly as it appears on your government-issued photo identification document)

Job Title \_\_\_\_\_

Organization \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone (work) \_\_\_\_\_ Phone (mobile) \_\_\_\_\_

Email address \_\_\_\_\_ Fax \_\_\_\_\_

☐ Check if you do NOT wish to receive e-mail from us regarding training institute events and programs.  
☐ Check if you have special needs addressed by the Americans with Disabilities Act. Please specify: \_\_\_\_\_  
☐ Check if you have attended a training institute before.

**Which of the following best describes your organization?**  
☐ government agency ☐ community-based development organization ☐ financial institution ☐ tribal government or tribal nonprofit  
☐ faith-based organization ☐ other \_\_\_\_\_

**Check if you are a** ☐ board chair ☐ board treasurer ☐ board member

**Which of the following best describes your race? Please choose all that apply.**  
☐ American Indian or Alaska Native ☐ Asian ☐ Black or African-American ☐ Hispanic or Latino  
☐ Native Hawaiian or Other Pacific Islander ☐ White ☐ Other  
☐ **Check if you work in a HUD-approved housing counseling agency. Your 5-digit HUD number** \_\_\_\_|\_\_\_\_|\_\_\_\_|\_\_\_\_|\_\_\_\_

## COURSES REQUESTED

Use both course letters and numbers. Please include second choices in case your first-choice courses are full.

	Monday and Tuesday	Wednesday	Thursday and Friday	First Choice Tuition Total
First Choice (Course #   Course\$)	# \$	# \$	# \$	=\$ _____
Second Choice (Course # only)	#	#	#	

**Payment must accompany your registration form. Faxed registrations must include credit card information and authorized signature. See payment policy.**

**Total Balance Due** = \$ \_\_\_\_\_

## PAYMENT INFORMATION

☐ Check enclosed (payable to NeighborWorks America). Check number \_\_\_\_\_  
☐ Purchase order must be attached. Purchase order number \_\_\_\_\_  
(Purchase orders will be accepted until November 18, 2019.)  
☐ Visa ☐ MasterCard ☐ American Express

Card # \_\_\_\_\_ Exp. date \_\_\_\_\_  
(mm/yy)

Name as it appears on card \_\_\_\_\_

Authorized signature \_\_\_\_\_

Fax registration with credit card information to: **(800) 834-3758**

Mail registration and payment to: Neighborhood Reinvestment Training, PO Box 418630, Boston, MA 02241-8630  
(This is a P.O. Box and cannot receive Fedex shipments.)

**EARLY PRE-REGISTRATION RAFFLE  
DEADLINE: OCTOBER 21\***

**FINAL PRE-REGISTRATION DEADLINE:  
NOVEMBER 18**

☐ On occasion, NeighborWorks® Training Institute shares your name and address with other organizations that are involved in nonprofit management and community development so that they may send you information about other products and services that may be of interest to you. If you are not interested in having us share your name, address, telephone number, fax number, and e-mail address with such organizations, please check the circle to the left of this disclosure statement. Rest assured that NeighborWorks® Training Institute honors your privacy and respects your wishes.

# REGISTRATION AND ACCOMMODATION INFORMATION FOR NEIGHBORWORKS ORGANIZATIONS, PORTLAND, OR

## REGISTRATION

The NeighborWorks network slot registration deadline is October 14. Indicate your first and second choices for courses each day on the registration form using the course letters and numbers. To verify that your organization is a NeighborWorks network organization, please check the members-only website at [www.NeighborWorks.org](http://www.NeighborWorks.org).

## ONLINE REGISTRATION

Network participants are encouraged to register via our online registration system, which allows you to enter lodging request, access your transcript history, update profile information and make course changes. If you are using a training slot, you will need the slot code in order to submit your travel and lodging needs. You may access the online registration tool at [NeighborWorks.org/onlineereg](http://NeighborWorks.org/onlineereg). First-time users to this online tool will need to create a User Profile before registering for the event.

## TRAINING INSTITUTE SLOTS

Each NeighborWorks network organization receives an annual (fiscal year: Oct. 1– Sept. 30) number of training institute slots. Each slot covers a discounted single occupancy lodging rate per night.

## TUITION RATE

NeighborWorks network members register for the training institute at a special flat rate of \$525.

Tuition includes courses and materials, afternoon workshops, and a light breakfast snack.

## TRAVEL

NeighborWorks organizations are given travel funding to complement their slots. Your organization is responsible for booking and paying for your own travel to the training institute using your own travel agency or online booking tool. If you are participating in a NeighborWorks meeting or receiving a scholarship in which travel is covered, you will receive special instructions on how to arrange your travel. In the registration process, be sure to specify the dates that you need a hotel room—which must match the dates for your courses/meetings.

## ACCOMMODATIONS

All NeighborWorks America events only book single-occupancy hotel rooms. As a network participant attending an event, you pay only \$105 per night times the number of days you participate in the training institute. The full payment: \$525 tuition plus the lodging per night cost is due at the time of registration by the slot registration deadline of October 14, 2019.

**All slot registrations include a discounted single occupancy room. If your registration is confirmed, please do not make a separate hotel reservation as NeighborWorks America already has you on the Master Block.**

Please notify us in advance if your travel plans change. Failure to check in the hotel on the confirmed date is considered a “no-show” and may lead to your hotel reservation being cancelled. Reinstatement to a no-show reservation is not guaranteed and will be based on hotel availability. If hotel reservations were confirmed on your behalf by us and you do not cancel and do not show up at the event, the hotel will assess a no-show charge to NeighborWorks, which will then be billed to your organization. Please review your confirmation letter for your assigned lodging hotel and dates, and assure that you arrive and depart on the dates scheduled. If you have any questions or concerns, reach us at [nti@nw.org](mailto:nti@nw.org), [TrainingEvents@nw.org](mailto:TrainingEvents@nw.org) or call (800) 438-5547.

## PAYMENT

Tuition and accommodation payment(s) must accompany your registration form. Illegible, incomplete forms or no payment attached will delay the registration process. Send completed registration form(s) and payment to: Neighborhood Reinvestment Training PO Box 418630, Boston, MA 02241-8630. When using a credit card, please fax it to (800) 834-3758.

## PAYING YOUR OWN EXPENSES (POE)

If your organization has exhausted institute slots and still wishes to have staff attend, you may pay the \$525 tuition rate, as well as arrange and pay for your own staff travel and lodging. Complete the registration form and check the “Pay Own Expenses” box. Submit the form with your tuition payment before November 18.

## SPECIAL NEEDS

If you have special needs addressed by the Americans with Disabilities Act (ADA), notify us at least one month before the Institute. If your special needs require you to be lodged at a hotel close to your courses, NeighborWorks America needs to be notified by the October 14, 2019 slot registration deadline.

## CANCELLATION AND REFUND POLICY

Your written cancellation notice must be received by November 18 to receive a tuition refund. If your cancellation notice is received less than three weeks before the start of the event, NeighborWorks will assess a \$150 cancellation fee and provide a tuition credit voucher for the remaining balance. The credit voucher expires if not used within one year of issuance. If cancellation notice is received less than five business days prior to the event, or if you do not complete your coursework, no refund or credit voucher will be issued and you forfeit the slot. If hotel reservations were confirmed on your behalf and you did not cancel and did not show up at the event, the hotel will assess a no-show charge to NeighborWorks America. The hotel no-show charge will then be billed to your organization. NeighborWorks reserves the right to cancel any course at any time. If your course is canceled, you may choose another course or request a tuition

refund and reinstatement of the institute slot. Other than refunding your tuition and reinstatement of the slot in the event that the course you selected is cancelled, NeighborWorks America is not liable to you for any other damages, including, without limitation, any obligation to provide refund for any travel or lodging costs associated with attending any NeighborWorks Training event or other direct, indirect, or consequential damages.

## SUBSTITUTION POLICY

Substitution requests will be accepted up to November 8 and requests are subject to course and lodging availability.

## ATTENDANCE AND CERTIFICATE POLICY

Courses start promptly and conclude on time, except for Friday, when courses end at 2:30 p.m. Certificates of completion are awarded only to participants who complete 100% of the course.

## PHOTO, AUDIO AND VIDEO RECORDING RELEASES

By entering the event premises, you consent to interview(s), photography, audio recording, video recording and its/their release, publication, exhibition, or reproduction to be used for news, web casts, promotional purposes, telecasts, advertising, inclusion on websites, or any other purpose by NeighborWorks America and its affiliates and representatives. You waive all rights you may have to any claims for payment or royalties in connection with any exhibition, streaming, web casting, televising, or other publication of these materials, regardless of the purpose or sponsoring of such exhibiting, broadcasting, web casting, or other publication irrespective of whether a fee for admission or sponsorship is charged. You also waive any right to inspect or approve any photo, video, or audio recording taken by NeighborWorks America or the person or entity designated to do so by NeighborWorks America. You release NeighborWorks America, its officers and employees, and each and all persons involved from any liability connected with the taking, recording, digitizing, or publication of interviews, photographs, computer images, video and/or sound recordings.

## CUSTOMER SERVICE

**Call: (800) 438-5547**

**Fax: (800) 834-3758**

**Email: [nti@nw.org](mailto:nti@nw.org)**

**Online Registration available –  
[NeighborWorks.org/onlineereg](http://NeighborWorks.org/onlineereg)**

# NEIGHBORWORKS NETWORK PARTICIPANTS REGISTRATION AND ACCOMMODATION FORM, PORTLAND, OR

**Register for this Training Institute online at [NeighborWorks.org/onlineereg](http://NeighborWorks.org/onlineereg) OR mail or fax this form to the NeighborWorks Training Institute.**  
(Please print or type. Illegible or incomplete forms delay the registration process.)

Preferred **First** Name On Your Badge \_\_\_\_\_

☐ Mr. ☐ Ms. Last Name \_\_\_\_\_ First Name \_\_\_\_\_  
(Optional) (TSA Secure Flight, provide your legal name, exactly as it appears on your government-issued photo identification document)

Job Title \_\_\_\_\_

Organization \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone (work) \_\_\_\_\_ Phone (mobile) \_\_\_\_\_

Email address \_\_\_\_\_ Fax \_\_\_\_\_

☐ Check if you do NOT wish to receive e-mail from us regarding training institute events and programs.

☐ Check if you have special needs addressed by the Americans with Disabilities Act. Please specify: \_\_\_\_\_

**Which of the following best describes your race? Please choose all that apply.**

☐ American Indian or Alaska Native ☐ Asian ☐ Black or African-American ☐ Hispanic or Latino ☐ Native Hawaiian or Other Pacific Islander ☐ White ☐ Other

**Check if you are a** ☐ board chair ☐ board treasurer ☐ board member

**SLOT REGISTRATION DEADLINE —  
OCTOBER 14**

## COURSES REQUESTED

Use both course letters and numbers. Please include second choices in case your first-choice courses are full.

	Monday and Tuesday	Wednesday	Thursday and Friday	Tuition
First Choice	# <input type="text"/>	# <input type="text"/>	# <input type="text"/>	
Second Choice	# <input type="text"/>	# <input type="text"/>	# <input type="text"/>	= \$ <b>\$525.00</b>

## ACCOMMODATION INFORMATION >> (PLEASE SELECT AND CHECK AN OPTION):

☐ Using a Training Institute Slot: Hotel room @ \$105 per night by \_\_\_\_\_ nights = \$ \_\_\_\_\_ \*Arrival date: \_\_\_\_\_ \*Departure date: \_\_\_\_\_

☐ Using a Training Institute Slot but NO hotel room needed.

☐ Pay Own Expense (POE) – **NOT** using a Training Institute Slot and arranging for own accommodations.

\*Please plan to arrive the day before your first class begins and depart the day your last class ends.

**Payment must accompany your registration form. Faxed registrations must include credit card information and authorized signature. See payment policy.**

**Total Tuition and Lodging Due:** \$ \_\_\_\_\_

## PAYMENT INFORMATION

☐ Check enclosed (payable to NeighborWorks America). Check # \_\_\_\_\_

☐ Purchase order must be attached. Purchase order # \_\_\_\_\_  
(Purchase orders will be accepted until November 18, 2019.)

☐ Visa ☐ MasterCard ☐ American Express

Card # \_\_\_\_\_ Exp. date \_\_\_\_\_ / \_\_\_\_\_  
(mm/yy)

Name as it appears on card \_\_\_\_\_ Authorized signature \_\_\_\_\_

Fax registration with credit card information to: **(800) 834-3758**

Mail registration and payment to: Neighborhood Reinvestment Training, PO Box 418630, Boston, MA 02241-8630 (This is a P.O. Box and cannot receive Fedex shipments.)





# ESSENTIAL SERVICES AND TOOLS TO OPTIMIZE YOUR IMPACT



To efficiently and effectively achieve your mission, you need increasingly sophisticated knowledge, skills and tools. But how do you know which ones? How can you tell where you and your organization need to focus in order to maximize your impact? And how do you know what kind of impact you're really having? To complement our comprehensive range of in-person and online training, NeighborWorks offers personalized consulting services and products to help you figure out where you are – and where you need to be.

## TRAINING IS JUST THE START

### **SUCCESS MEASURES®**

A leading outcome evaluation group, Success Measures at NeighborWorks America provides the expertise, tools and technology needed by community development and health-related organizations, funders, and partners to effectively demonstrate results, improve programs, and communicate stories of change. Guided by our participatory approach, we offer comprehensive support throughout the evaluation process – from planning and design to implementation and analysis; a full suite of measurement tools; and the Success Measures Data System, our specialized technology to help you conduct evaluations efficiently and affordably.

- Consulting and technical assistance
- Selection of more than 350 customizable measurement tools
- Success Measures Data System, our web-based platform to help you plan and conduct all phases of your evaluation

[WWW.SUCCESSMEASURES.ORG](http://WWW.SUCCESSMEASURES.ORG)



# Community Development

It's what we do.

## Working Together for Strong Communities®

Our mission: NeighborWorks America creates opportunities for people to live in affordable homes, improve their lives and strengthen their communities.

The NeighborWorks network of more than 245 independent, nonprofit organizations helps individuals, families and communities thrive through comprehensive approaches to affordable housing and community development.

We build the skills, supplement the funding and amplify the reach of grassroots organizations so they can leverage additional resources to achieve their missions.

## NeighborWorks supports its network and the broader community development field through:

- ▶ Grants
- ▶ Technical assistance
- ▶ Training and leadership development
- ▶ Organizational assessment

Learn more at

[www.NeighborWorks.org](http://www.NeighborWorks.org)



## It's our 40th anniversary!

Together with our national network of excellence, we've assisted an estimated 4 million families with affordable housing since our founding in 1978.



**Over 10,000**  
professionals from  
more than  
2,500 organizations  
trained each year



**\$70 billion**  
Total  
investment



**731,000**  
Homes built or  
homeowners  
assisted



**152,400**  
Rental homes  
constructed, acquired  
and preserved

Working Together for Strong Communities®



**START PLANNING AND JOIN US FOR UPCOMING  
NEIGHBORWORKS TRAINING INSTITUTES IN 2020:**  
**Get updates on current events and upcoming Training  
Institutes by visiting [NeighborWorks.org/Training](http://NeighborWorks.org/Training)**

**NEIGHBORWORKS AMERICA ACKNOWLEDGES THE  
PARTNERS OF OUR NATIONAL TRAINING EFFORTS**

**PRESENTING SPONSORS**



**VANGUARD SPONSORS**



**CHAMPION SPONSORS**



**FRIEND SPONSORS**



**NEIGHBORWORKS TRAINING INSTITUTE ENDORSERS**

American Planning Association  
Consortium of Asset Managers (CHAM)  
Enterprise Community Partners  
Habitat for Humanity International  
Housing Assistance Council

Institute of Real Estate Management  
Local Initiatives Support Corporation  
National Association of Housing  
and Redevelopment Officials

National Coalition for Asian Pacific  
American Community Development  
National Foundation for Credit Counseling  
Rural Community Assistance Corporation  
UnidosUS

NeighborWorks Training Institute  
999 North Capitol Street NE, Suite 900  
Washington, DC 20002  
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