

Association of Alaska Housing Authorities
October 16, 2012

Proposal for

Office of Native American Programs Training and
Technical Assistance

CFDA 14.893

A Regional Approach for Alaska

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Proposal Abstract

The Association of Alaska Housing Authorities (AAHA) and its partners are pleased to submit this proposal seeking \$999,685 to deliver a training and technical assistance (TA) program to Indian Housing Block Grant (IHBG) recipients on a regional level for the Alaska ONAP region. AAHA will serve as the prime contractor. It is an eligible applicant under Category One as it is a regional nonprofit organization representing Native American housing interests. (Please note that AAHA is applying under Category One with this application. We will apply separately under Category Two, as directed. If only one application is accepted per organization, with this application, we are applying for both Categories One and Two).

This proposal features an innovative approach to delivering services through a demand-response system and includes high-impact training opportunities from NeighborWorks® America, one of the country's preeminent leaders in affordable housing and community development. AAHA's other partners include a cadre of training and technical assistance providers with extensive experience addressing Alaska Native housing issues.

This proposal responds to the identified training needs of both small and large tribes and IHBG recipients, with the goal of helping both small and large tribes increase capacity and better leverage NAHASDA resources. The Alaska region will continue to rely on other service providers to provide training on core HUD training topics such as NAHASDA Essentials. This proposal addresses the capacity requirements of delivering complex, northern climate housing and community/economic development to Alaska Native communities throughout the state. It consists of offering the following eligible activities on a demand-response basis over a period of up to two years:

- **Needs Assessments** As directed by HUD, AAHA will assist potential recipients to determine the appropriate levels and types of training and TA by conducting needs assessments.
- **Direct TA** will be provided through:
 - Consultants with Alaska Native housing expertise
 - Peer coaching by Alaska Native Regional Housing Authorities with areas of expertise
 - Peer Learning Circles during place-based training opportunities
- **Materials, Tools, and Courses** will be provided by NeighborWorks America through:
 - A wide range of materials, tools and courses relevant to housing and community development will be provided, with refinements for the Alaska housing context as appropriate
- **Group Learning** will be provided by NeighborWorks America through:
 - Two place-based trainings in Anchorage
 - 50 demand-response training/professional development opportunities at NeighborWorks Training Institutes (NTIs)
 - An online learning pilot program including:
 - Two demand-response, instructor-led virtual classes
 - 100 demand-response opportunities from NeighborWorks catalogue of eLearning courses (choice of 21 courses)
 - AAHA will also offer two courses on topics identified by Alaska IHBG recipients as a training need: "Legal Issues for Tribal and TDHE Managers" and "Board of Commissioners Training"

Rating Factor #1: Experience and Personnel

Recent Experience and Performance

AAHA and its partners have extensive recent and relevant experience managing training and technical assistance activities that are the same or similar to those recommended in this proposal. This team has a proven ability and successful track record providing different types of technical assistance for diverse recipients. Both AAHA and NeighborWorks America have complied with all past contract and/or cooperative agreement provisions and financial performance reporting requirements. They have drawn down funds in a timely manner and closed out all awards appropriately.

NeighborsWorks® America has managed multiple, large, and complex training and technical assistance awards in multiple locations simultaneously. AAHA and its TA providers have extensive knowledge with the Indian Housing Block Grant and experience working with tribes and Alaska Natives.

AAHA and its team are qualified to provide services in all of the areas specified in the NOFA including:

- NAHASDA;
- Low-income housing development, inspection, maintenance, modernization, and operation;
- Admissions and occupancy;
- Procurement;
- Financial and fiscal management;
- Program income;
- Governance and organizational development;
- Leveraging financing including Low Income Housing Tax Credits (LIHTC) and Title VI;
- Healthy home environments including mold and air quality issues;
- Homebuyer education;
- Crime prevention;
- Youth activities, including but not limited to Boys and Girls Clubs; and
- Consultation Facilitation.

In addition, under the category of "other topics responsive to low-income housing issues in Native communities," this team includes expertise on topics such as:

- Leveraging IHBG funds through Community Development Financial Institutions;
- Affordable housing development as part of a community economic development strategy;
- Housing building techniques in cold climates and remote locations;
- Home energy conservation; and
- Financial education and other asset building strategies such as Individual Development Accounts.

AAHA's Experience

The Association of Alaska Housing Authorities is a private, non-profit 501(c)(3) corporation whose membership and board of directors consists of fourteen Alaska Native regional housing authorities and the Alaska Housing Finance Corporation. The organization's goals are to increase the supply of quality, affordable housing and associated infrastructure within the state of Alaska, to provide employment opportunities, and to facilitate community economic development. AAHA works at the local, state, and national level to facilitate partnerships that result in increased affordable housing supply. The organization operates as an information clearinghouse, providing funding information and technical assistance on affordable housing development and community economic development strategies.

AAHA contracts with the McDowell group, an economic consulting firm, to provide biennial economic impact reports. The purpose of these reports is to provide information on job opportunities available through the regional housing authorities and to increase public awareness on the economic impact the regional housing authorities have within the state of Alaska. For example, the 2010 study found that the regional housing authorities employed 2,250 individual Alaskans and generated \$268 million in economic activity.

AAHA's Statewide Administrator will oversee the program, and additional staff and contracted personnel will assist her in the management of this training and technical assistance program. In order to ensure high quality, professional financial management, AAHA outsources its financial management tasks. Its 15-member board of directors is comprised of the Executive Directors of each of its member organizations and is highly engaged. Regular board meetings are quarterly, and the board often has special board meetings to take action on certain issues. AAHA's board has an executive committee, legislative/regulatory committee, advocacy committee, and a training committee.

AAHA's training committee is comprised of three board members who provide guidance on and oversee its training efforts. AAHA plans to expand the size and meeting frequency of its training committee to accommodate the increase in volume of training and technical assistance activities as a result of this initiative. One of the training committee's primary functions is to conduct an annual survey of its members to determine their training needs and preferences.

Based on the results of its annual training survey, AAHA has a history of partnering with national training experts, community development organizations, and public and private agencies to bring quality and relevant trainings that meet the needs of the organization's membership.

AAHA is an experienced contract manager and has extensive experience helping to design, market, and handle the logistics for a broad range of training topics in the past 24 months including:

- **Facilitation Services for Alaska Housing Finance Corporation:** AAHA receives and administers an annual \$140,000 contract from the Alaska Housing Finance Corporation, the state's housing finance agency to serve as a coordinating entity for the work of the Alaska Native regional housing authorities and to provide programs and activities (including training programs) that result in an increased supply of quality, affordable housing. AAHA staff performs these coordination services, and outcomes include an increased supply of housing and associated infrastructure, increased employment opportunities, and expanded community development.

- **Governing Boards of Commissioners Training:** For the past several years, the National American Indian Housing Council (NAIHC) has sub-contracted with AAHA for approximately \$7500 annually or biennially (depending on demand) to provide an Alaska Native regional housing authorities' governing boards of commissioners training. The boards of commissioners serve as the boards of directors for Alaska's regional housing authorities. AAHA contracts with Alaskan attorneys Kim Dunn and Stephen Hutchings to deliver the trainings. Regional housing authority (RHA) chief executive officers provide the portion of the training that focuses on leveraging NAHASDA funds, and regional housing authority finance officers provide the financial oversight and financial management section of the training. A team of five comprised of AAHA staff, AAHA members, and sub-contractors provide this service. On average, 25 individuals attend this training each time it is offered. Its outcomes include having Alaska Native RHA boards of commissioners be fully informed about NAHASDA and its regulations and guidance, and to understand and be able to implement their oversight responsibilities as a member of the board of directors.
- **Healthy Homes Specialist and Lead Renovation, Repair, & Painting (RRP) Training:** AAHA partnered with HUD and the Environmental Protection Agency to market this training and to ensure that the training was appropriate to Alaska. The training was provided by the University of Washington, the Alaska Cooperative Extension Service and others. Approximately 20-30 individuals attended each of two trainings in 2012. Participants worked for IHBG recipients and in Native American environmental health roles. The training goal was for participants to better understand what constitutes a healthy home environment. The outcome was that about 60 participants learned how to alter a home environment so that it is healthier for families and participants received information on what types of healthy home education should be provided to families.
- **Alaska Housing Management Training/Admissions and Occupancy:** AAHA requested this training, handled logistics including marketing and registration, and worked with the trainer to ensure that it covered Alaska specific issues. The National American Indian Housing Council provided the training once in 2012, and approximately 20 participants attended. The training goal was for the staff of Alaska Native regional housing authorities and tribes to be fully informed on NAHASDA as it pertains to housing management and admissions and occupancy and to be able to operate a program that meets federal, state, and tribal requirements. Outcomes included that participants were informed on the law and regulations related to housing management and admissions and occupancy.
- **NAHASDA Indian Housing Block Grant Formula Training:** AAHA partnered with FirstPic to organize this training on September 28, 2012, and provided marketing and registration services. Approximately 50 individuals attended. The training goal was for the staff of Alaska Native regional housing authorities to be fully informed on NAHASDA as it relates to the allocation of the IHBG funding formula. Outcomes included that the participants were informed about the act's regulations and guidance as they pertain to the funding formula, and participants gained the skills to operate a program that meets federal, state, and tribal requirements.
- **Maintenance Supervision Training:** AAHA requested this training, handled logistics including marketing and registration, and worked with the trainer to ensure that it covered Alaska specific issues. The National American Indian Housing Council provided the training in 2011, and eight

participants attended. The training goal was for the staff of Alaska Native regional housing authorities and tribes to be fully informed on NAHASDA as it pertains to maintenance supervision. Outcomes included that participants were informed on how to operate a program that meets federal, state and tribal requirements, and participants gained the skills to effectively supervise a maintenance program.

- **Developing Alaskan Sustainable Housing (DASH) Conference:** Most recently, AAHA worked with the HUD ONAP Alaska region to co-sponsor the *Developing Alaskan Sustainable Housing* conference in Anchorage on September 25-27, 2012. Topics for this training included: sustainable housing resources, financing and leveraging models, renewal energy and utilities, and lowering the cost of energy. The conference also included a peer sharing component that provided a forum for housing providers to share innovative housing development strategies. An overview of this experience is summarized below in Table 1.

Table 1: AAHA's Recent Experience with Managing T & TA Activities

Awarding Organization	Award Date	Award Amount	Period of Performance	Awarding Organization Contact
Alaska Housing Finance Corporation – coordination services	FY 2013 FY 2012 FY 2011	\$140,000 \$140,000 \$140,000	Annual	John Anderson janderson@ahfc.us Bob Brean bbrean@ahfc.us
NAIHC – Governing Boards of Commissioners Training	FY 2013 FY 2011 FY 2010	\$7,200 \$7,400 \$7,500	Nov. 6-7, 2012	John Seignemartin NAIHC jseignemartin@naihc.net
HUD ONAP AK – Developing Alaskan Affordable Housing (DASH) conference	Outreach and marketing partner	N/A	Sept. 25-27, 2012	Bill Zachares HUD ONAP AK Administrator bill.zachares@hud.gov
HUD and EPA – Healthy Homes Specialist and Lead RRP Training	Local Alaska partner	N/A	Jan. 24-26, 2012 May 17-18, 2012	Erin Mader EPA mader.erin@epa.gov
NAIHC – Housing Management and A&O training/ Maintenance Supervision	Local Alaska partner	N/A	May 15-16, 2012 Jan. 25-26, 2011	John Seignemartin NAIHC jseignemartin@naihc.net
FirstPic – NAHASDA IHBG Formula	Local Alaska partner	N/A	Sept. 28, 2012	Mindi D'Angelo FirstPic mdangelo@firstpic.org

NeighborWorks® America's Experience

NeighborWorks America is a national nonprofit organization chartered by Congress in 1978. Its mission is to create opportunities for Americans to live in affordable homes, improve their lives, and strengthen their communities. Now, 35 years later, NeighborWorks continues to strengthen communities across America as the country's preeminent leader in affordable housing and community development. Headquartered in Washington, DC, NeighborWorks America operates through a national office, two regional offices, and seven district offices.

NeighborWorks has been providing the highest quality community development training in the country for over 20 years through its NeighborWorks® Training Institutes (NTIs), which are held four times annually in different cities around the country. Practitioners and partners throughout the industry hold NTIs in high esteem because of the high quality of the course content, outstanding faculty, and excellent peer-to-peer learning. Each of the four NTIs offers over 100 courses in eight different program areas, all of which support HUDs policy priorities and strategic goals for FYs 2010-2015:

- Homeownership and Community Lending,
- Affordable Housing Development,
- Housing Asset Management,
- Community Economic Development,
- Community Engagement,
- Community and Neighborhood Revitalization,
- Management and Leadership, and
- Construction and Production Management.

The NTIs also offer an array of specially designed rural and Native American development courses.

Through its Training Division, NeighborWorks has in place the expertise and institutional capacity to plan and conduct high-quality trainings and deliver course content in flexible formats to meet the needs of local practitioners. Effective systems and efficient staff are in place to enable a rapid and seamless launch of this project. NeighborWorks has been providing the highest quality community development training in the country for over 24 years through its NTIs. For the past five years, NeighborWorks has also been providing its courses to local markets through place-based training events, conducted in collaboration with local, regional, and national partners.

In addition to classroom training provided through NTIs and place-based training, NeighborWorks America has developed a robust, state-of-the-industry online learning program, consisting of both module-based eLearning and instructor-led, group-based "virtual classroom" courses. Unlike webinars that are often passed off as "trainings" both of these online offerings are based on sound adult education design and delivery, are highly interactive and engaging, and involve exercises, learning checks, tools, and end-of-course exams. Both forms of training are equivalent to a one to two day classroom training. E-learning courses take on average 3-4 hours to complete and may be completed over a 60-day period. Virtual Classroom courses, led by an instructor and involving a cohort of 15-25 learners, take place over a three to four week period and involve exercises and collaborative work with various online tools; learners generally need to dedicate 3-4 hours of time per week to successfully complete the course. Both forms of online learning may generally be done at times of the learner's choosing. Currently, NeighborWorks America

offers more than 25 online courses and awards more than 5,000 training certificates a year through online education.

NeighborWorks has an extensive and proven track record of developing and implementing specialized technical assistance programs for community development corporations (CDCs) and CDFIs. Since 2005, NeighborWorks has been the primary trainer and certifier of HUD housing counseling agencies under a cooperative agreement with the HUD; the program has trained and certified thousands of housing counselors, homeownership educators, financial literacy educators and coaches, and foreclosure mitigation counselors from hundreds of HUD approved housing counseling organizations. All of this training has been provided based on an NTI, place-based training, and e-learning demand-response, affording housing counseling organizations to access the specific training and certifications they need.

NeighborWorks' recent implementation of the Foreclosure Solutions, Portfolio Management, and CDFI Capitalization task orders under the CDFI Capacity Building Initiative provides valuable insight into the design, delivery and implementation of training and technical assistance programs targeted towards CDFIs. In addition, NeighborWorks has experience managing training and technical assistance programs such as the U.S. Department of Housing and Urban Development's community development technical assistance and training program for Historically Black Colleges and Universities, the Department of Justice Weed and Seed Capacity Building Program, and the Congressionally appropriated National Foreclosure Mitigation Counseling Training program.

In addition to post-training evaluations conducted at the end of each course delivery, every two years, NeighborWorks America also conducts a comprehensive impact evaluation of training participants 3-12 months after they completed the training to assess the degree to which they are using the competencies covered in the training and its impact on them and their organizations. In the most recent NeighborWorks Training Impact Study, 98% of participants indicated that NeighborWorks Training was useful in building their skills and knowledge to do their work better. Approximately 96% of respondents reported that the NeighborWorks Training has contributed to, or will contribute to, their organization's ability to be more successful in achieving its mission. In addition, 95% of respondents said that NeighborWorks training has contributed to, or will contribute, to benefiting the customer/community they or their organization serves. Through NeighborWorks Training, capacity is increased at all levels – individual, organizational, and community.

Native American Training Program In 2003, NeighborWorks developed the Native American Community Development (NACD) Training Program to provide high quality training opportunities tailored specifically to Native Americans and community development practitioners serving Native communities. The specialized curriculum helped to build the capacity of hundreds of Native organizations in the areas of homebuyer education, financial education, organizational development and planning and housing development. To accomplish this, NeighborWorks established a team of instructors who are the best in their field and possess a unique combination of technical knowledge, adult-learning expertise, and an intimate understanding of Native culture. Through the NACD Program, NeighborWorks provided approximately 400 full scholarships for practitioners to attend NTIs, awarded over 1,000 Certificates of Completion in Native American courses, and certified over 200 Native American homebuyer education counselors. NeighborWorks went to great lengths in the planning and advisory stages of the program to contract with the highest quality course developers and instructors in each of the course content areas. Participants have specifically recognized the in-depth knowledge and vast experience of the NACD instructors as key to their positive review of the course.

NeighborWorks Network in Rural America and Native Partners NeighborWorks has a unique relationship with approximately 230 community development organizations known as the NeighborWorks Network, that receive special financial, training, technical, and organizational assessment assistance. NeighborWorks supports its network organizations in developing and testing new and innovative programs and services; measuring, documenting and evaluating the outcomes of these efforts; and summarizing and broadly disseminating the lessons learned from these innovations. In addition, NeighborWorks works to increase access to capital for the Network through Community Housing Capital and NeighborWorks Capital Corporation.

Members of the NeighborWorks network include the Navajo Partnership for Housing and the Montana Homeownership Network, along with a number of organizations who collaborate with TDHEs and tribal organizations. For instance, NeighborWorks Montana works with tribal housing entities and other tribal organizations from all seven Montana reservations. Community Works North Dakota has a history of service and partnership with the Standing Rock reservation. In addition, as part of a series of regional pilots designed to increase the access to USDA Rural Development 502 Direct loans in areas of persistent poverty, two NeighborWorks organizations in South Dakota established a partnership with a consortium of the South Dakota tribes. These and other examples provide valuable lessons for the creation of strategic partnerships between Native and non- Native organizations to achieve scale and leverage resources.

Beyond its network, NeighborWorks also creates opportunities for Native organizations to participate in its training and capacity building events. Since 2008, the National Coalition for Asian Pacific American Community Development (CAPACD) has received up to 15 foreclosure-related full tuition and lodging training scholarships per NTI to ensure its members, such as the Council for Native Hawaiian Advancement, can access training opportunities. In addition, the NeighborWorks Pacific District sponsored a team of community leaders from the Department of Hawaiian Homelands to attend the 2009 NeighborWorks Community Leadership Institute.

As part of a commitment to pursuing affordable homeownership opportunities for Native Americans, NeighborWorks supported the report, "Exercising Sovereignty and Expanding Economic Opportunity through Tribal Land Management, a Study Addressing the Range of Options to Expedite Land Title Processing on Indian Lands." The June 2009 report was the result of a joint project with National Congress of American Indians and First Nations Development Institute, funded by NeighborWorks America and Stewart Title Guaranty Company (Stewart Title). Key NeighborWorks staff members have testified before the House Financial Services Subcommittee on Housing and Community Opportunity regarding the Title Status Report (TSR) process for leasehold mortgages on Tribal Trust Land and have firsthand experience working with Native organizations on the development of housing counseling and lending programs.

NeighborWorks Summary of Direct TA experience NeighborWorks America also has extensive experience providing direct technical assistance. Just as an example: NeighborWorks America was awarded four separate task orders over two years to provide training and technical assistance as part of the Community Development Financial Institution Fund's (CDFI) Capacity Building Initiative. The purpose of this initiative is to greatly expand technical assistance and training opportunities for CDFIs nationwide and significantly boost the ability of CDFIs to deliver financial products and services to underserved communities. The task orders included the following initiatives:

- The Leadership Journey- Native CDFI Growth and Excellence: This series supports the continued growth and long-term sustainability of experienced Native CDFIs by providing the forum, tools, and resources for Native CDFI leaders to identify and address the critical challenges of their organizations. Training, technical assistance (on topics ranging for financial modeling, loan and development services pricing, building customer pipelines, business and strategic planning, evaluation and outcomes, board development), executive coaching and specialized resources are available to cohort members. This initiative is ongoing and currently serves 32 cohort members from 16 different Native CDFIs. Short-term outcomes include assisting some cohort members with: completing business and strategic plans, analyzing loan portfolios, strengthening their leadership and board of directors; and providing coaching through executive transitions. This initiative is currently ongoing, but we anticipate that long-term outcomes will include Native CDFIs that are strengthened, and as a result, are able to access more capital so that they can increase lending and development services in their communities. Two NeighborWorks staff members and a team of ten consultants that serve as TA providers, trainers and executive coaches manage this task order.
- Portfolio Management and Risk Assessment task order: This series helped CDFIs improve the capacity to manage their portfolios, including assessing and reducing portfolio risk. Participants learned techniques and strategies through a combination of training, technical assistance, organizational assessments and an online resource bank. Training and TA topics included financial modeling, trend line analysis, assessing risk, managing portfolios and problem loans, developing policies and procedures and creating new loan products. Short term outcomes: As part of this initiative, over 250 people were trained in classroom training, over 350 people took webinars, over 125 organizations received TA, and 15 organizations received free organizational assessments. One NeighborWorks staff member and a team of 16 consultants that served as TA providers and trainers managed this task order.
- Capitalization and Liquidity task order: This series helped CDFIs learn strategies and techniques for increasing their capitalization and improving their liquidity. Participants had access to live and remote training, technical assistance, organizational assessments and an online resource bank. Training and TA topics included developing capitalization plans, liquidity analysis, business planning, board presentations and loan fund merger assistance.. Short-term outcomes included over 125 people were trained in classroom training, over 360 people took webinars, over 125 organizations received TA, and 15 organizations received free organizational assessments. One NeighborWorks staff member and a team of 16 consultants that serve as TA providers and trainers managed this task order.
- Foreclosure Solutions task order: This series helped CDFIs build their capacity to operate highly effective foreclosure intervention programs. The series offered training, technical assistance (on topics such as), and access to tools and resources. Participants were able to improve their understanding of foreclosure intervention counseling and learn how to effectively implement a counseling program in their communities. Short-term outcomes include the training of 37 participants, onsite and remote technical assistance offered to nine urban and rural CDFIs and free eLearning courses for staff of eligible CDFIs. A major long-term outcomes is that organizations that test new strategies to provide more efficient and cost-effective services are likely to assist more families in achieving long term "sustainable homeownership. One NeighborWorks staff

member and a team of nine consultants that serve as TA providers and trainers manage this task order.

TABLE 2: Other Training and Technical Assistance Awards- NeighborWorks® America

Awarding Organization	Award Date	Award Amount	Period of Performance	Awarding Organization Contact
CDFI Fund – The Leadership Journey - Native CDFI Growth and Excellence	6/1/11	\$552,000 \$184,000 for travel scholarships	06/15/11 - 06/14/13	Dave Scherler, CDFI Fund; scherlerd@cdfi.treas.gov
CDFI Fund Capacity Building Initiative: Portfolio Management and Risk Assessment Task Order	9/27/10	\$500,000	9/30/10-6/30/12	Candace Herring, CDFI Fund; herringc@cdfi.tres.gov
CDFI Fund Capacity Building Initiative: Capitalization and Liquidity Task Order	9/27/10	\$200,000	9/30/10-6/30/12	Candace Herring, CDFI Fund; herringc@cdfi.tres.gov
CDFI Fund Capacity Building Initiative: Foreclosure Solutions Task Order	9/27/10	\$500,000	9/30/10-9/29/12	Candace Herring, CDFI Fund; herringc@cdfi.tres.gov
U.S. Department of Housing and Urban Development – Housing Counseling Training	5/16/2012	\$962,963	04/01/2012-03/31/2013	Ruth Roman, Office of Housing Counseling ruth.roman@hud.gov
U.S. Department of Housing and Urban Development – Housing Counseling Training	3/01/2011	\$3,050,001	10/01/2010-12/31/2011	Ruth Roman, Office of Housing Counseling ruth.roman@hud.gov
U.S. Department of Housing and Urban Development – Housing Counseling Training	12/31/09	Initial: \$3,240,301.22 Amended: \$834,766.42 Total: \$4,075,067.64	10/01/2009-03/31/2012	Ruth Roman, Office of Housing Counseling ruth.roman@hud.gov

Key Personnel

Key personnel for providing direct services in this proposal include staff and consultants for AAHA and NeighborWorks America.

Association of Alaska Housing Authorities

Heather Arnett – Statewide Administrator: Heather will provide program oversight and administration. She has been the Statewide Administrator for the Association of Alaska Housing Authorities (AAHA) since 2008. Previously, Heather was the executive director for the YWCA Anchorage. She has also served as executive director for the LeeShore Center in Kenai, which provides social services throughout the central Kenai Peninsula. In 2007, the Soroptimist International of Cook Inlet awarded her their *Making a Difference for Women* award. She is currently completing a Master's degree in Public Administration through the University of Alaska, Anchorage.

Program Manager – to be hired: AAHA will hire a part-time program manager to provide program management and coordination for this initiative. This staff person will also provide needs assessment coordination, manage the TA program, and manage all financial and other reporting requirements to HUD ONAP.

Teri Nutter – AAHA Board President: Teri has led the Copper River Basin Regional Housing Authority for nearly 12 years – first as the Deputy Director and then as the Executive Director. She oversees the planning and implementation of an approximately \$2 million IHBG grant for affordable housing activities. In addition to her role as the AAHA board president, she is also the Vice Chairman of the National American Indian Housing Council board of directors and a Council Member of the Gulkana Village Council.

Amanda Trangmoe – AAHA Financial Manager: Amanda is the current controller for the North Pacific Rim Housing Authority and provides financial management services for a broad range of organizations through the North Pacific Rim Housing Authority Business Services. She performs various accounting services including financial statement audits, compliance audits, reviews, compilations, and implementation and training of accounting systems.

Table 3: Summary of AAHA Experience

Name/Organization	Practitioner Role & Timeframe	Program Knowledge & TA Skills	IHBG Knowledge	Alaska Native Experience
Heather Arnett Statewide Administrator, AAHA	7 years as an Alaska Native housing practitioner	Program management	Yes	Yes, 7 years working for AAHA
Teri Nutter, Board President, AAHA	20+ years as Alaska Native housing and community development practitioner	IHBG program management	Yes	Yes, 20+ years working for Alaska Native organizations and serving in tribal leadership roles
Amanda Trangmoe,	8 years as an	Accounting services	Yes	Yes, financial

Name/Organization	Practitioner Role & Timeframe	Program Knowledge & TA Skills	IHBG Knowledge	Alaska Native Experience
North Pacific Rim Housing Authority Business Services	accounting practitioner			management for Alaska Native organizations
AAHA Technical Assistance Providers				
Name/Organization	Practitioner Role & Timeframe	Program Knowledge & TA Skills	IHBG Knowledge	Alaska Native Experience
Cold Climate Housing Research Center – Jack Hebert John Davies Kathryn Dodge Colin Craven Nathan Wiltse Bruno Granau Robbin Garber-Slaght Ilya Benesch David Shippey Aaron Cooke Judith Granau	30+ years as housing practitioners	<ul style="list-style-type: none"> Cold climate housing building techniques On-site infrastructure development, including wastewater systems 	Yes	Provides services to Alaska Tribes and TDHEs
Kim Dunn	27 years as legal practitioner	<ul style="list-style-type: none"> Collections strategies Housing legal issues 	Yes	Provides legal services and training to Alaska Tribes and TDHEs
Blake Kazama	22 years as an Alaska Native housing practitioner	<ul style="list-style-type: none"> Management training Reorganization training Boards of Commissioners training Business development planning Strategic planning 	Yes	Yes, served as executive director of Alaska Native regional housing authority
Steven Rouse	10 years as an Alaska Native housing practitioner	<ul style="list-style-type: none"> Affordable housing financing strategies Pre-development and development services Project management 	Yes	Yes, has provided services to Alaska Tribes and TDHEs

Name/Organization	Practitioner Role & Timeframe	Program Knowledge & TA Skills	IHBG Knowledge	Alaska Native Experience
Wayne Mundy	25+ years as Alaska Native housing practitioner	<ul style="list-style-type: none"> Housing construction, maintenance, inspections and operations activities Procurement activities Financial/fiscal management Admissions and Occupancy Program Income Leveraged financing, i.e. Sec 184, Title VI, LIHTC Homebuyer education Crime Prevention/ Youth Activities (B&G Clubs) Organizational development and governance 	Yes	Yes, served as executive director of Alaska Native regional housing authority as well as the HUD Area ONAP Administrator for Alaska
AAHA Trainers				
Kim Dunn	27 years as legal practitioner	<ul style="list-style-type: none"> Boards of Commissions training Housing Legal Issues 	Yes	Provides legal services and training to Alaska Tribes and TDHEs
Stephen Hutchings	26 years as legal practitioner	<ul style="list-style-type: none"> Boards of Commissions training Housing Legal Issues 	Yes	Provides legal services and training to Alaska Tribes and TDHEs

Given the unique challenges, remoteness, and isolation that face many Alaska Native communities and villages, a common source of technical assistance for Tribes and TDHEs in Alaska is their peers. Over the past few years, many of AAHA's member organizations have begun providing technical assistance on demand to less experienced Tribes or TDHEs. To further support the proposed TA program, AAHA has invited several of its strongest performing members to provide technical assistance to their peers in Alaska on certain topics related to promoting affordable housing opportunities on a demand- response basis. Table 4 below provides a summary list of these participating organizations.

Table 4: Peer Technical Assistance Providers

Organization	Name/Title	Expertise
Aleutian Housing Authority	Shannon Reynaga, Project Manager/ Environmental Review Record (ERR) Officer	<ul style="list-style-type: none"> Managing environmental reviews
	Kennedy Serr, Chief Administrative Officer - Construction	<ul style="list-style-type: none"> Contract administration Procurement Labor and wage rate compliance
Cook Inlet Housing Authority	Carol Gore, President/CEO	<ul style="list-style-type: none"> Affordable housing development as part of community economic development strategies CDFI development
	Maria Tagliavento, VP of Business Development	<ul style="list-style-type: none"> Financial management and reporting LIHTC compliance CDFI development
Interior Regional Housing Authority	Kim Carlo	<ul style="list-style-type: none"> Weatherization
North Pacific Rim Housing Authority	Olen Harris, Executive Director Barry Moring, CFO Amanda Trangmore, Controller Yvonne Krenzelak, Accountant	<ul style="list-style-type: none"> Leveraging NAHASDA funds Financial management
Tagiugmiullu Nunamiullu Housing Authority	Daryl Kooley, Executive Director	<ul style="list-style-type: none"> Pre-development and development services Building techniques in remote locations
Tlingit Haida Regional Housing Authority	Letasha McKoy, Energy Conservation Program Specialist	<ul style="list-style-type: none"> Home energy conservation
	Dawn Wesley, Loan Servicing/ Financial Skills Specialist	<ul style="list-style-type: none"> Developing and managing a financial education program

The complete resumes for AAHA's key personnel can be found in Appendix A.

NeighborWorks America Key Personnel

NeighborWorks Staff The nature of the work of NeighborWorks Training Division is client-based and deadline driven. This program will be able to leverage NeighborWorks America's deep capacity of more than 60 staff (many with advanced degrees and many years of experience in training, adult education and curriculum design), who have been delivering the highest quality, most highly regarded and responsive housing and community development training and technical assistance programs in the country for more than 20 years. This staff includes teams of expert curriculum managers (one for each of our eight training tracks and several in the homeownership education, counseling and lending training area),

curriculum production specialists, meeting planners, operations personnel, online curriculum manager, and much more. Table 6 includes the bios of NeighborWorks managers who will assist with the delivery of on-demand group learning under this proposal.

NeighborWorks Faculty NeighborWorks staff and faculty consultants (who train at National Training Institutes, place based Trainings and online) have expertise in asset management, housing authority management, developing and constructing affordable housing, developing and revitalizing economically viable communities, nurturing leaders and building thriving organizations. In addition, the NeighborWorks team has expertise in: implementing training and capacity building programs for Native American leaders and housing/community development practitioners; the design, refinement and delivery of culturally appropriate training curriculum; and the provision of facilitated peer coaching at the place based trainings. Capacity is in place to refine pertinent courses on topics under the listed areas of expertise on an as-needed basis for an Alaska context.

The NeighborWorks faculty brings the following qualifications:

- Through the NTIs and PBTs, a full curriculum of over 200 community development courses. In FY 2011, NeighborWorks awarded over 22,000 training certificates to more than 3,400 organizations. Through the multi-year Native American Community Development Training Program, a collection of training courses and talented faculty, NeighborWorks provided over 1,000 certificates of completion for Native American training courses, directly benefitting more than 100 tribes.
- A team of NeighborWorks staff with a track record of managing effective training and technical assistance programs including for Native organizations.
- A roster of consultants with extensive experience working in Native communities. Their expertise includes strategic planning organizational development, asset building, credit coaching, financial education, affordable housing development, mortgage finance, CDFI development, financial management, leadership and staff development, resource development, evaluation and curriculum design.
- A roster of consultants that have played integral roles in various Indian Country initiatives including: Native CDFI Network, NeighborWorks America *Native American Community Development* training track; curriculum development of *Building Native Communities Financial Skills for Families* and *Pathways Home: A Native Homeownership Guide*, and Developing Native Sites with YouthBuild USA.

With years of experience, a depth of knowledge and existing relationships in the Native housing and community development field, key NeighborWorks staff, working in close collaboration with the core consultant team, has the capacity to deliver effective training and peer coaching upon commencement of the contract. In addition to experienced staff and our team of top notch trainers, NeighborWorks will consult with members of the Seven Sisters Community Development Group, LLC, a small, women-owned community development consulting firm, to assist with contextualizing courses and developing and facilitating the peer coaching Learning Circles at the place based trainings. The firm includes a former Indian housing authority executive director, two attorneys, two degreed social workers (one of whom is a PhD candidate), and a credit counselor. They have extensive experience designing,

managing and delivering training and technical assistance programs for Native housing organizations and other Native serving organizations such as associations and CDFIs.

Table 5 represents a listing of the consultants and their individual expertise below.

Table 5: Seven Sisters Community Development Group, LLC Consultant Team

Consultant Name	Practitioner Role & Timeframe	Program Knowledge and TA Skills	IHBG Knowledge	Indian Country Experience
Joanna Donohoe	Consultant/21 years experience Former ONAP employee	<ul style="list-style-type: none"> • Leveraging IHBG • CDFI development • Homeownership • Financial education • Asset building 	Yes	Yes, has worked with Native communities for 17 years
Barbara Roloff (Native Hawaiian)	Consultant/ 25 years experience Former TDHE executive director	<ul style="list-style-type: none"> • IHBG • Financial management • Section 184 and homeownership • Homebuyer education 	Yes	Yes, has worked as Executive Director of TDHE and in Indian Country for 25 years
Vickie Oldman-John (Navajo)	Consultant/15 years experience	<ul style="list-style-type: none"> • CDFI development • Team building • Board development • Financial education • Youth development 	Limited	Yes, has worked with Native communities for over 15 years
Charmagne Dolphin (Sallish)	Consultant/6 years experience Former credit union loan officer	<ul style="list-style-type: none"> • Credit counseling • Lending • Policies and procedures 	Limited	Yes, has worked with Native communities for 6 years
Noorie Brantmeier (Arapaho, Saponi, Taino),	Consultant/ 6 years experience	<ul style="list-style-type: none"> • Evaluation • Financial education • Coaching 	Limited	Yes, has worked with Native communities for 6 years
Natasha Shulman	Consultant/5 years of experience Former banker	<ul style="list-style-type: none"> • Curriculum development • Behavioral economics 	Limited	Yes, has drafted several curricula for Indian Country

The resumes and bios of key NeighborWorks personnel are presented in the Appendix B.

Designation as Tribally Owned Entity

The Association of Alaska Housing Authorities satisfies the definition of "tribally owned entity" as defined by this Notice of Funds Availability because it is a nonprofit entity whereby Indian "ownership" of the entity constitutes not less than 51 percent. AAHA is a membership-based nonprofit corporation. Its membership is comprised of Alaska's fourteen Regional Native Housing Authorities and the Alaska Housing Finance Corporation. Therefore, AAHA's Indian "ownership" is 93% or 14 out of 15 members.

In Alaska, AAHA spreads awareness of affordable housing and community development issues, specifically with respect to Alaska Native and American Indian communities. It also offers training and technical assistance in an effort to increase the supply of safe, sanitary, and affordable housing throughout Alaska.

In 1974, the Alaska Legislature determined that "an acute shortage of housing and related facilities exists in the villages of the state" and that adequate housing could not be provided by the private sector "due to the economic depression that exists in most villages of the state." The Alaska Legislature therefore facilitated the creation of Alaska's Regional Native Housing Authorities, each representing an Alaska Native entity that is specifically identified in the Alaska Statutes. For example, Cook Inlet Housing Authority was created to represent the housing interests of the Cook Inlet Tribal Council.

Rating Factor #2: Soundness of Approach

The Association of Alaska Housing Authorities and NeighborWorks America have joined together along with a team of qualified consultants to present this experienced management team and comprehensive work plan to deliver training and technical assistance to eligible applicants in Alaska. This initiative is consistent with HUD's policy priority for "Capacity Building and Knowledge Sharing." It also promotes the following HUD goals:

- Goal 1C. Create financially sustainable homeownership opportunities.
- Goal 2: Meet the needs for quality affordable rental homes.
- Goal 3C. Utilize HUD assistance to increase economic security and self-sufficiency.
- Goal 4B. Promote energy efficient buildings and location efficient communities that are healthy, affordable and diverse.

Management and Capacity

Key Management Staff

AAHA and its subcontractor NeighborWorks America each have strong teams of managers who will work closely together to coordinate the delivery of these training and TA services. AAHA managers will also establish consistent and frequent communication channels with the appropriate HUD ONAP managers. They will also collaborate with other service providers as directed by HUD ONAP.

AAHA Management Personnel: The Association of Alaska Housing Authorities has assembled a competent management team to oversee this initiative. Heather Arnett, AAHA Statewide Administrator, will serve as the lead manager focusing on program design, implementation, and evaluation. She will also serve as the liaison with both the Alaska ONAP office and ONAP Headquarters. AAHA's board chairperson and board training committee member Teri Nutter along with the other two board training committee members Daryl Kookey and Olen Harris will provide management oversight to ensure quality control and that the training and technical assistance needs are adequately addressed through the demand-response system. In addition, AAHA will hire an additional, part-time program manager to work collaboratively with the board training committee, manage the annual membership training survey, assist with the prioritization and assignment of training and technical assistance services, and coordinate efforts with AAHA's training and technical assistance subcontractors.

Table 6 below summarizes qualifications, professional highlights, roles and responsibilities, and experience working with a demand-response system of each of AAHA's managers. Full resumes are included in Appendix A.

Table 6: AAHA Key Management Staff

Name	Professional Highlights	Roles and Responsibilities	Experience with Demand-Response System
Heather Arnett Statewide Administrator (1994-97, 2008-present); BA in Communications/ Linfield College; MPA/University of Alaska in 2013; 25 years experience	Heather has been the statewide administrator for AAHA since 2008. Prior to that, Heather was the executive director for the YWCA Anchorage. She has also served as executive director for the LeeShore Center in Kenai, which provides social services throughout the central Kenai Peninsula. In 2007, the Soroptimist International of Cook Inlet awarded her their <i>Making a Difference for Women</i> award.	<ul style="list-style-type: none"> • Overall management • Program design • Budget management • Program implementation • Evaluation 	Currently oversees and implements the AAHA's training and technical assistance program including surveying the membership annually to determine training and technical assistance needs and to prioritize training and TA offerings.
Teri Nutter AAHA board chair, Prince William Sound Community College; 20 years experience	Teri has led the Copper River Basin Regional Housing Authority for nearly 12 years – first as the Deputy Director and then as the Executive Director. She oversees the planning and implementation of an approximately \$2 million IHBG grant for affordable housing activities. In addition to her role as the AAHA board president, she is the Vice Chairman of the National American Indian Housing Council board of directors and a Council Member of the Gulkana Village Council.	<ul style="list-style-type: none"> • Management oversight • Quality control 	Currently prioritizes training and technical assistance offerings to AAHA members based on annual membership training survey.

Name	Professional Highlights	Roles and Responsibilities	Experience with Demand-Response System
Daryl Kooley AAHA training committee; BA/Central Washington State College, Master's/Boston University; 20 years experience	Daryl has been the executive director of Tagiugmiullu Nunamiullu Housing Authority since 2008, managing a \$78 million budget. He has worked for Alaska Native regional housing authorities for over 10 years. He is a results-driven professional with demonstrated success in cultivating strong rapport with service recipients, vendors, government contacts, the public, senior management, and colleagues.	<ul style="list-style-type: none"> • Management oversight • Quality control 	Currently prioritizes training and technical assistance offerings to AAHA members based on annual membership training survey.
Olen Harris AAHA training committee; BA/University of Alaska; 16 years experience	Olen has been the executive director of the North Pacific Rim Housing Authority since 1997 and has worked for Alaska Native regional housing authorities for his entire career. He specializes in financial management.	<ul style="list-style-type: none"> • Management oversight • Quality control 	Currently prioritizes training and technical assistance offerings to AAHA members based on annual membership training survey.
Program Manager To be hired	Will work with AAHA's training committee, conduct annual training survey, prioritize training and TA needs, handle training logistics, coordinate between HUD ONAP and training and TA providers, and submit performance reports to HUD ONAP.	<ul style="list-style-type: none"> • Program management • Financial management • Performance reporting 	AAHA will seek a candidate with experience working in a client-driven environment.

NeighborWorks America Management Personnel: NeighborWorks America will serve as the lead training partner. As a member of the proposed team, NeighborWorks has assembled a team of key managers that is uniquely positioned to carry out specified portions of the proposed work under the demand- response system. NeighborWorks has an extensive track record of providing effective training and technical assistance to housing and community development organizations across the United States including organizations serving rural and Native populations. Participating eligible IHBG recipients would have access to one of the leading training platforms in the community development field along with a group of highly skilled and experienced faculty consultants; many of whom have worked in rural America and have provided services in Native communities.

Table 7: NeighborWorks Key Management Staff

Name	Professional Highlights	Roles and Responsibility	Experience with Demand-Response System
<p>Paul Kealey Director of Training Division (2002 to present); BA/San Francisco State University, MS/University of California at Davis; 25 years experience</p>	<p>Mr. Kealey oversees the NeighborWorks Training Institute (NTI). In 2005, he launched the NeighborWorks® Center for Homeownership and Counseling (NCHC) and in 2008, spearheaded the creation of the National Foreclosure Mitigation Counseling training program. He has also directed other key NeighborWorks educational programs, including the Achieving Excellence in Community Development Program with Harvard University and the NeighborWorks Community Leadership Institute. In 2005 and again for seventeen months in 2011-12, Mr. Kealey served as the NeighborWorks acting chief operating officer, appointed by the NeighborWorks board of directors. Mr. Kealey has over twenty-five years of leadership experience in community development, international development, training and adult education, and volunteer service programs with the Corporation for National and Community Service, the U.S. Peace Corps, and World Wildlife Fund and is fluent in Spanish.</p>	<ul style="list-style-type: none"> • General project oversight and leadership 	<ul style="list-style-type: none"> • HUD Housing Counseling Training Program • Department of Justice Weed and Seed Training Program • National Foreclosure Mitigation Counseling Training Program • Wells Fargo Native American Community Development Training Program

<p>Randy Gordon Director of Curriculum (August 1998 – present), BA in French/Dartmouth College; MA in International Community Development/American University; 25 years experience</p>	<p>Mr. Gordon has extensive experience in course design, curriculum development, training and evaluation. In his current capacity he oversees a team of six curriculum managers and a team of five who manage the curriculum production of course manuals and materials. Prior to joining NeighborWorks America he worked for ten years in the field of community development supporting efforts in Latin America and the Caribbean. Mr. Gordon is fluent in Spanish and French and has a basic working knowledge of Haitian Creole.</p>	<ul style="list-style-type: none"> • Oversight and administration of all curriculum development and refinement • Training course selection • Production of course manuals and materials 	<ul style="list-style-type: none"> • CDFI Fund Training and TA Program • CDFI Fund Native Training and TA Program • Department of Justice Weed and Seed Training Program • HUD HBCU Training and TA Program • Wells Fargo Native American Community Development Training Program
<p>Evelyn Bando Training Manager (April 2012- Present); BS Economics /Syracuse University; MPA and Master of Science in Taxation/American University; 11 years experience</p>	<p>Ms. Bando is the Training Manager for the Community Economic Development, Rural Development and Native American Community Development learning tracks where she plans, manages, evaluates, develops, and refines all related courses. She is also the project manager for Native CDFI capacity building initiative where she works with a consultant group and oversees the training and technical assistance for a cohort of 16 Native CDFIs. She is a SBA award winning micro, small business and financial empowerment trainer, a community economic development practitioner and an adjunct professor.</p>	<ul style="list-style-type: none"> • Workplan development, general program management and coordination • Liaison with AAHA on training needs assessments • Plan and manage training delivery • Manage expert consultants and work with them on course development, refinement and Learning Circle process • General reporting 	<ul style="list-style-type: none"> • CDFI Fund Native Training and TA Program

<p>Lee Anne Adams Business Development (February 2008 – Present)/ BA, International Affairs and MA, International Development/ 15 years of experience</p>	<p>Ms. Adams is the business development and special projects manager for NeighborWorks. Prior to, Ms. Adams was the training manager responsible for Community Economic Development, Rural Development and Native American Community Development. She has over 15 years of experience working with community development organizations on the design, implementation and evaluation of community-based economic development programs in the U.S. and Latin America. Her experience includes managing multiple training contracts including for the USDA Rural Community Development Initiative and a Wells Fargo Housing Foundation award for Native American Community Development training.</p>	<ul style="list-style-type: none"> • Contract execution and work plan development • General program management as needed • Virtual classroom course development and content management 	<ul style="list-style-type: none"> • CDFI Fund Native Training and TA Program • Wells Fargo Native American Community Development Training Program
<p>Vivian Jackson Financial Manager (November 2005 – Present); BS, History; 14 years experience</p>	<p>Ms. Jackson manages budgeting, financial tracking and reporting for training events and activities. She has experience in accounting and financial management. She graduated as a public accountant from Colombia, South America. Ms. Jackson is fluent in Spanish.</p>	<ul style="list-style-type: none"> • Financial management and reporting 	<p>N/A</p>

<p>Jill La Panna Online Learning Manager BS, Education, MS Education, 17 years experience</p>	<p>Ms. La Panna is the Online Learning Manager in our Training Division. She spearheads the expansion of NTI courses offered online and supports other training options using webinars and social networking. Prior to joining NeighborWorks America, she worked for over five years as an online instructional designer and project manager.</p>	<ul style="list-style-type: none"> • Online Learning Program management and registration technical course development • Virtual classroom development-technical • Virtual classroom-course facilitation- back end management 	<p>N/A</p>
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Management Work Plan

Policies and Procedures Through this management work plan, AAHA will expand its existing training and TA program for its members to include all IHBG recipients in Alaska. The organization will build on its current process and expand its training partners to include NeighborWorks America, experienced trainers and TA providers with Alaska expertise, and Alaska regional housing authorities who will serve as peer TA coaches. It will implement this management work plan through the following policies and procedures:

- *Consultation with Alaska Area ONAP* – AAHA has a strong working relationship with the Alaska Area ONAP office. They have historically partnered with ONAP to maximize resources available to meeting the training and TA needs of IHBG recipients in Alaska. This open communications policy will continue through this initiative. AAHA's program manager will work with the Area Office to identify needs and challenges.
- *Managing T&TA requests from ONAP Headquarters* – AAHA's program manager will also maintain open lines of communication with the ONAP Headquarters office to monitor demand for training and TA, seek approval for all training and TA materials, and coordinate with other TA and training providers in Alaska.
- *Assigning appropriately skilled and knowledgeable staff to develop or provide ONAP T&TA across program areas* – AAHA will keep an inventory of the skill sets of their trainers and TA providers to ensure accurate assignments are made. The program manager will monitor all assignments to stay current on each provider's strengths, skills, and knowledge.
- *Prioritizing and managing multiple ONAP T&TA engagements* -- AAHA is very familiar with the IHBG recipients in Alaska and is perfectly poised to prioritize and manage multiple engagements in the state. The program manager will track client contacts and training and TA delivery through an electronic database and TA reports from service providers.
- *Coordinating and collaborating with other T&TA providers in the Alaska Area ONAP region* – Given AAHA's history of collaborating with providers across the state, this policy will be a continuation of current practice.
- *Managing the overall operation with a focus on delivering results* – AAHA will prioritize the development of an evaluation program to ensure a focus on delivering results.
- *Reporting progress and outcomes* – AAHA will work closely with HUD ONAP to agree on a reporting system and schedule. At a minimum, AAHA will:
 - Require its TA providers to submit monthly TA progress reports
 - Require NeighborWorks to submit post-training reports including training evaluation results
- *Resolving issues or overcoming obstacles that may affect progress* – AAHA will provide quarterly reports to its board of directors and training committee during this initiative. The board members will respond to issues or obstacles identified by staff in these reports and work collectively to overcome any issues that may affect progress. AAHA's open communications with HUD ONAP will also assist in avoiding and resolving obstacles.

Multi-Disciplinary Approach AAHA and NeighborWorks America proposes a multi-disciplinary approach to the delivery of ONAP T&TA to maximize effectiveness. The proposal consists of performing the following eligible activities on a demand-response basis over a period of up to two years:

1. Approach to Conducting Needs Assessment:

- **Needs Assessment requested by HUD ONAP:** Upon assignment by HUD ONAP to conduct a needs assessment of an eligible recipient, AAHA will make a determination about whether the assessment can be conducted by phone, might require a site visit, or should be completed as a self-assessment or an assessment by HUD.
- **Needs Assessment by Annual AAHA Survey:** AAHA will continue to ascertain the needs from the field through its annual survey, expanding its distribution beyond just its membership to all of the Alaska Native IHBG recipients.

2. Approach to Technical Assistance:

- **Direct TA Program:** AAHA will manage a direct TA program that will provide access to up to 2500 hours of TA for eligible IHBG recipients in the region. TA would be provided both onsite and remotely by phone and email. AAHA has assembled a team of consultants who have a breadth of experience in working in Alaska Native housing. Table 3 and 4 above highlights AAHA's roster of consultants available to provide training and/or TA under this proposal on a demand- respond basis.
- **Peer TA Coaching:** AAHA will coordinate a peer TA coaching program through which Alaska Native regional housing authorities with certain areas of expertise can provide coaching to their peers in that area.
- **Learning Circles:** Peer-learning circle coaching will take place at each PBT. These peer coaching sessions will provide an opportunity for participants to experience place-based TA and peer coaching in the context of the courses experienced at the PBTs. Each learning circle will consist of a facilitator (an expert in housing and/or community development that serves Native Americans) leading discussions with participants to help them synthesize and strategize how to translate the course content into actionable steps.

3. Approach to Courses, Materials, and Tools:

- **Course Development and Delivery:** NeighborWorks courses employ a variety of learning techniques combining lecture with case studies, small-group exercises, demonstration, and other participatory methods preparing practitioners to deliver high quality services. Courses are designed to ensure educational effectiveness using proven adult learning methods. Each course contains an overall course objective, core competencies with specific knowledge, skills and abilities needed to achieve the overall course objective, and the learning/instructional objectives. Lesson plans, including varied learning activities, steps and resources needed to teach each course are developed. This facilitates consistency and serves as a guide to achieve the desired objectives. Training curricula emphasize a hands-on approach, combining lectures with peer-to-peer learning, case studies, site visits, small-group exercises, demonstrations and other participatory methods. Following a competency-based design model, many courses require an online final exam. Experienced faculty are provided detailed Instructor's Guides and/or lesson plans to ensure consistent course delivery and the achievement of desired objectives. Courses offered at the PBTs may be modified to address specific concerns as it relates to housing and community development issues in Alaska.

The curricula identified for the scope of this proposal take into account that each eligible recipient organization will have varying levels of capacity. Fundamental, intermediate and advanced courses are available to effectively meet the different learning needs of each eligible recipient. In addition to a team of trainers with experience working with various housing and

community development organizations in and outside of Indian Country, NeighborWorks has a roster of 250 additional faculty consultants that deliver training. These are top-notch trainers with extensive, multi-faceted work experience. Specifically for the PBTs, in the event that an existing course is identified as relevant to this initiative, but the trainer does not have experience in Native communities, AAHA and NeighborWorks will pair the instructor with a knowledgeable consultant to help slightly modify the course for a Native/Alaskan Context. ***Existing course manuals are proprietary and remain the property of NeighborWorks, unless fully developed using funding from this contract.*** Appendix C highlights a sampling of courses descriptions related to the areas of expertise listed in the NOFA.

- **Tools and Materials:** NeighborWorks course manuals are further enhanced by a range of tools and resources for use outside of the classroom and after TA engagements. In addition to course content, course manuals are comprised of case studies, learning checks, organizational checklists and assessments, logic models and framework worksheets, sample program evaluations, sample loan packaging documents, financial modeling software, and much, much more. Appendix C presents a further highlight of tools and resources available in the NTI course manuals.
- **TA-based Tools:** As a result of NeighborWorks' development and management of several capacity building initiatives on behalf of the Community Financial Development Institute (CDFI) Fund, there is now a series of current tools and resources for the benefit of CDFIs and other lenders working in the, housing and community development industries. Examples of these tools include:
 - Three 60-minute recorded webinars for CDFIs addressing foreclosure services: "What's Your Next Move," "Creating Connections Part 1," and "Creating Connections Part 2"
 - Four 90-minute recorded webinars: "Raising Debt and Equity from External Sources;" "Loan Policies and Procedures;" "Risk Assessing Your Own Organization;" and "Managing Troubled Assets"
 - Four 90-minute recorded webinars for Native CDFIs: "How to Price Your Loan Products;" "How to Price your Development Services;" "Combating Predatory Lending;" "Maximizing the Effectiveness of your Native CDFI's Loan Policies and Procedures"
 - Two resource banks that incorporate tools, resources, research, reports, training information and best practices for CDFIs managing a range of programs.

4. Approach to Group Learning:

- **Alaska Housing Training Program:** Up to 50 eligible participants will have access to two training topics relevant to tribes and TDHEs in the State of Alaska:
 - **Board of Commissioners Training** will cover the following topics: NAHASDA law and regulations, governing structure for regional housing authorities and tribes, overall duties of the governing body, financial oversight responsibilities of the governing body, board-chief executive relations, HUD assistance and monitoring, current issues in housing, challenges in oversight and other critical areas for board consideration – insurance, program selection, procurement, labor issues, Alaska Native/Indian preference and more.

- **Legal Issues for Tribal and TDHE Managers** will cover the following topics: managing personnel, procurement risks, contracting, financial management, occupancy risk management, and collections & evictions.
- **NeighborWorks Demand-Response Place-Based Training (PBT) in Alaska:** Each PBT will offer six to nine courses and serve up to 90 learners. Both will be held in Anchorage, AK, based on the preferences of tribes and TDHEs in Alaska. The courses offered at each PBT will be selected via a needs assessment conducted by AAHA in partnership with NeighborWorks and approved by HUD ONAP. Courses selected will be a combination of one, two, three and five-day courses, depending on the subject matter of each course and whether the course provides a certification. Courses demanded may be in Affordable Housing Development and Finance, Homeownership Education and Counseling (including foreclosure prevention), Community Economic Development, Community Revitalization, Community Engagement, Construction Management, Property and Asset Management, or Management and Leadership. There will be some refinement of courses offered at the PBTs so that the material is contextualized for Alaska Native housing.
- **NeighborWorks America Demand-Response National Training Institutes (NTI) Professional Development Opportunities for 50 IHBG recipients:** These NTI opportunities will allow eligible recipients to choose from an array of more than 200 different courses and certifications in all the professional development areas mentioned above, in addition to invaluable opportunities for networking, peer learning and sharing, and the ability to bring back industry best practices to their respective organizations in Alaska. Table 8 lists the dates for upcoming NTIs for FY2013 and 2014 beginning in February 2013. These opportunities provide flexible, on-demand, timely, and specialized professional development as individual IHBG recipient organizations will be able to prioritize the specific training needs of individual staff members. An asset manager can become certified in rental property asset management; a homeownership counselor can achieve certification in housing counseling or foreclosure intervention counseling; a construction manager can receive professional training in housing construction management; and other staff can be trained in affordable housing finance and development, community economic development, nonprofit management and leadership, etc. *(It is important to note that participants' travel and lodging to these trainings will be provided by NeighborWorks America using other resources – not charged to this HUD ONAP award.)*
- **NeighborWorks® America Online Learning Pilot Program:** Alaska is faced with unique transportation and access challenges as it relates to eligible IHBG recipients receiving the timely, relevant, and impactful training that they need to build the capacity of their organizations. As internet access becomes more accessible to even some of the most rural parts of the state, online learning may prove as a viable solution to the challenge of access to training. To this end, NeighborWorks will work with AAHA to pilot an online learning program.

Upcoming National Training Institutes: FY 2013-14	
Atlanta, GA	February 18-22, 2013
Portland, OR	May 6-10, 2013
Philadelphia, PA	August 19-23, 2013
Kansas City, MO	December 9-13, 2013
Los Angeles, CA	February 24-28, 2014
Louisville, KY	May 19-23, 2014
Orlando, FL	August 18-22, 2014

Table 8: Schedule of Upcoming NTIs

This pilot will consist of providing up to 150 training slots across our two powerful learning platforms:

- **Two Demand-Response Virtual Classroom Trainings by NeighborWorks® America:** Virtual classroom courses are interactive, faculty-led, multi-week programs that offer professional development similar to what is provided at face-to-face NTI courses. The difference is that participants interact with an expert faculty member and fellow participants *online* and at their own convenience. These courses incorporate online tools (blogs, chat rooms, wikis, etc.) that keep learners connected, and ensure a high-quality and results-oriented training experience. A total of up to 50 participants will be trained under this initiative. Up to 25 training slots will be made available for eligible IHBG recipients to take one of five existing virtual classroom courses that best fits their training needs. An additional 25 training slots will be made available under a newly developed virtual classroom course that will be determined based on a needs assessment. Eligible IHBG recipients will also have the option to jointly select an existing NTI course (that is taught face to face) and request (with approval from HUD ONAP), that the course be converted to a virtual classroom that is contextualized to address the unique issues and needs of Alaska. Appendix C provides a list of current virtual classroom course offerings.
- **Demand-Response eLearning courses:** eLearning courses are self-contained courses, made up of individual modules covering the equivalent content to a one- or two-day classroom course. The courses, which take three to four hours of actual computer time to complete, are designed to allow participants to log in and out at their leisure and complete the course within 60 days of enrollment. There are learning checks built into each eLearning class to ensure learner competency and understanding of the course content. Appendix C details the list of online course offerings available at this time. A total of up to 100 participants will be trained using the eLearning platform. Participants will have access to over 20 different courses. Like the NTI opportunities, these trainings are a flexible, specialized, just-in-time on-demand element of our proposal, in that individual IHBG participant organizations can select from a wide array of courses most needed by their staff – from foreclosure intervention counseling to affordable housing development to asset management and more.

Implementing Training and TA in a Demand Response Environment

Group Learning in a Demand-Response Environment: For all group learning opportunities, once approved and requested by HUD ONAP, AAHA will conduct surveys of IHBG recipient organizations to determine which professional coursework and certification training from NeighborWorks America's extensive array of more than 200 community development and affordable housing courses are of greatest need by those groups. Once the professional development needs are identified (the "demand"), AAHA will prioritize the top 6-9 courses each year to be offered as "place-based trainings" to be conducted in Anchorage, Alaska, and the one-to-two additional courses that rise to the top of the priority list to be selected for delivery as a "virtual classroom" courses. In each case, HUD ONAP will be provided a thorough description of the results of the needs assessment and the criteria for selecting the courses chosen for their final approval to move forward. Based on this assessment of the demand, AAHA and NeighborWorks America will move forward to respond to that demand by conducting the requisite training.

As for e-learning and NeighborWorks Training Institute (NTI) professional development opportunities, each Native-serving Indian Housing Block Grant recipient organization will be able to determine priority professional development needs of their staffs (their demand for training). They will then have access to the wide array of e-learning and NTI community development professional development training available to them (more than 170 courses in all). As noted above, the "demand" of organizations with different staff that have different functional responsibilities can receive the training and professional development that they need be it community economic development or construction management or affordable housing finance or housing counseling, etc.

Project Management Approach to Training: NeighborWorks has in place a highly trained and experienced team of professionals responsible for organizing and managing national and regional training initiatives. Project Managers are assigned to all contracts awarded to guarantee that work plan goals are met by coordinating closely with other NeighborWorks divisions, as well as with sub-contractors. In addition, a Project Administrator is assigned to provide contract administration including all aspects of compliance, accurate and timely reporting, and financial and administrative support to the program. For NTIs and PBT events, NeighborWorks will use its Training Events and Activities Management (TEAM) database system to track delivery of trainings, course attendance, and successful course completion by eligible recipients as well as certificates of completion awarded. The same data will be collected for any remote and onsite technical assistance provided within the reporting period. This information will be provided by the consultants delivering the specified services and compiled by NeighborWorks staff.

Table 9: Summary of Implementation Process

Eligible Activity	Implementation Process
Needs Assessment	<ul style="list-style-type: none"> • Request received from HUD ONAP to provide services. AAHA responds to HUD request within 72 hours or three business days if request falls on a Thursday or Friday. • AAHA reviews the Needs Assessment and either completes the needs assessment or assigns the appropriate TA provider to complete the needs assessment. • Completed needs assessment and proposed work plan sent to Area ONAP and HUD ONAP for review, concurrence and approval • Approved work plan implemented over the specified timeframe
Direct TA	<ul style="list-style-type: none"> • Steps 1-4 in Needs Assessment above • Assign appropriate TA provider based on identified needs and work plan • Recipient and TA provider create an organizational TA action plan based on needs assessment and action plan approved by HUD ONAP. TA action plan will identify goals, timeline, milestones, outputs and/or outcomes and will establish accountability during the TA Process • TA provider will complete brief session notes for each TA meeting (to be submitted to the program manager after each session) and complete an end of engagement report • After TA engagement is complete, AAHA program manager will administer an online TA survey (using a tool like Survey Gizmo) and compose the results into a report.

	<ul style="list-style-type: none"> • Once complete, AAHA program manager will submit to HUD ONAP: TA report and TA evaluation for each TA client served by AAHA. • AAHA will conduct a follow up survey with TA recipients at the 12 month mark (of the two-year contract period) to determine the organization's mid-term results • AAHA will compile the results for the TA program to determine overall effectiveness and incorporate results into the program-end evaluation.
Group Learning	<ul style="list-style-type: none"> • NeighborWorks course materials for virtual classroom and PBTs will be updated and refined as needed for an Alaska Native community context and approved by HUD ONAP. Course refinement plan with timeline will be developed and process will be led by the NACD Training Manger working collaboratively with AAHA, content experts, appropriate training manager for learning area and the Online Learning Manager (when necessary). Final updated course(s) will be shared with HUD ONAP for final approval. Course materials for AAHA board of commissioners and legal issues for managers' trainings will be provided to HUD ONAP for approval.
Materials, Tools and Courses	<ul style="list-style-type: none"> • Training event requested by eligible recipients and sent to Area ONAP for review and concurrence • Finalized training event sent from Area ONAP to HUD ONAP • HUD ONAP approves training event • Needs assessment conducted by AAHA to determine actual courses at training event • If AAHA training- AAHA will implement the training event • If NeighborWorks training, NeighborWorks will initiate the internal place based training process. Using their Training and Events Management (TEAM) platform, NeighborWorks staff will program the courses, contract for training venues, engage expert faculty consultants to teach courses, manage event registration with the help of AAHA, refine and produce course materials, produce and deliver the actual training event, and evaluate and share the results of the training with AHHA • For NTI Training opportunities, courses will be posted 4 months before each Institute and eligible recipients would apply using NeighborWorks online scholarship module. A list of applicants and courses requested would be submitted to HUD ONAP for final approval before registration is completed and confirmations made. NeighborWorks would process the registration using the client management system TEAM, assign the recipient lodging and provide a travel authorization so that the recipient could book travel. (See Table 8 for NTI dates). <i>(Note- NeighborWorks is providing up to \$60,000 in travel and lodging for this initiative and no HUD funds will be used to pay for recipient travel. Please see Rating Factor 3- Leverage for more details</i>

Proposed Budget

Expenses

The proposed activities and level of effort represent AAHA's cost-effective strategy for providing a blend of training and technical assistance to eligible IHBG recipients on a demand-response basis. Our proposed budget in Table 10, below, provides a detailed and comprehensive listing of the expenses required to implement the activities and service deliverables. These expenses will include partial salaries for AAHA and NeighborWorks America staff that provide program and administrative oversight, meeting planning, tracking, reporting, grant execution and disbursements, as well as payment to consultant contractors who will provide professional services and training and technical assistance services under this proposed program of service. The largest expense is for professional services. This line item includes the instructors for the place based trainings and virtual classroom offerings, the direct TA providers (including the "Learning Circle facilitators") and experts to help refine identified courses in an Alaska context.

Table 10: Proposed Budget

HUD-22-03 Budget Category	AAHA-22-03 Budget Category	Description	Funding Source
REVENUE			
HUD ONAP T & TA	\$ 999,685	Contract Total	
EXPENSES / Allocation of AAHA Housing Authority (AAHA)			
Employee Salary	102,520	Key Project Staff: Program Administrator and Project Manager. Also includes direct cost for administration staff support. AAHA will not charge an indirect rate, but directly include corporate admin staff costs.	Staff to support overall program oversight and administration, manage needs assessments, manage the Direct TA program, coordinate board and legal training, quarterly reporting
Employee Benefits	40,880	At 40% of salaries	Health and other fringe benefits
Staff Travel	6,525	Trips to HUD required trainings – average \$2,175/trip	Staff travel up to three 5-day trips to HUD required trainings
Trainer/Consultant Fees	227,520	Average \$576/day x 395 consultant days; fees to conduct Technical Assistance, Training, Financial Management, and Reporting	Instructor preparation and instruction for AAHA Training, technical assistance, financial management and reporting.

Trainer/Consultant Expenses	14,760	Averages approx. 6% of fees	Trainers' airfare, lodging, meals, etc. for 10 day Regional Technical Assistance Trips
Course Materials	1,480	\$740/course materials for two AAHA Training for RHA Boards of Commissioners and Legal Issues for Managers	Additional course materials and information documents for training sessions.
AAHA Subtotal	\$ 393,685		
Employee Salary	119,000	Key Project Staff: Project Manager, Director of Curriculum, Meeting Planning Specialist and Production Coordinator. Also includes direct cost for additional training and corporate administration staff support. NeighborWorks America will not charge an indirect rate, but directly include corporate admin staff costs.	Staff to support course offerings at NTIs and PBTs (see narrative). Leveraged NeighborWorks America and other funds support additional training and finance division personnel.
Employee Benefits	44,000	At 37% of salaries	Health and other fringe benefits
Staff Travel	24,000	10 NTI/PBT trips including planning & partnership meetings @ average of \$2,400/trip	Staff travel to two NTIs, up to two PBTs, planning and partnership meetings
Equipment/AV/Computer Rentals/Computer Stations at Institutes	38,000	Audio-visual and computer rentals for classrooms, average \$760 per NTI/PBT course.	Audio-visual, computer rental and other equipment needs in classrooms. Computers are used in classes, for on-site registration, certificate generation, online test taking, etc.
Supplies	2,000	Course-related supplies @ \$9.00 per course participant/certificate earner	Course materials, binders, misc. office supplies

Trainer/Consultant Fees	221,000	Average \$500/day x 442 consultant days; fees to conduct NTI courses, place-based trainings, and update existing courses.	Instructor preparation and instruction of NTI courses and place-based/local courses; updates to online course and development of one Virtual Classroom course, revise and update existing courses, trainer development and impact evaluation.
Trainer/Consultant Expenses	49,000	Averages approx. 44% of fees	Trainers' airfare, lodging, meals, etc. for NTIs and PBT events
Meeting Room Rental Fees and Internet Lines	24,000	Classroom space/line rental - @ \$200 per room and \$440 per day computer lines for selected classes.	Classroom rentals and, when needed, internet computer lines at NTIs and PBTs.
Group Meals	34,000	Continental breakfast, beverages for morning and afternoon breaks @ \$148 per course participant	NTIs: Continental Breakfast, AM Coffee Breaks PBTs: AM/PM Coffee Breaks
Occupancy	15,000	Workspace @ \$15,000 per FTE	Office space for project staff.
Postage	1,000	Mail house marketing \$45/ mailing	Mailing of 2,200 marketing pieces to organizations and individuals.
Course Material and Equipment Delivery	10,000	\$200/course average	Delivery of manuals, additional course materials and equipment for NTIs and PBTs.
Printing, binders, etc.	14,000	\$61/course materials per participant	Course materials and informational materials - plus Realizing the American Dream (now includes CD-ROM of tools) for applicable courses.
Agency Fee-Temp Help	11,000	\$2,750 per NTI/PBT average	Temporary services for on-site computer and audio-visual support, course material collation and distribution, and registration packet assembly.
NWA Subtotal	\$ 606,000		
Total Proposed Budget	\$656,000		

Cost Effectiveness and Cost Savings

We will achieve significant leverage and cost savings by using a blended training and technical assistance approach. First, this proposal draws upon an existing array of NeighborWorks curriculum of over 200 courses that is considered the best in the industry and has already been developed and continually updated and revised over the years that this program will not have to develop. Even assuming that IHBG recipients access a small number of the courses available – say 32 courses (and much more than that will almost certainly be accessed through demand-response to NTIs and e-learning courses) – there will have been more than \$585,000 in course development and updates and refinement of those courses over the years. Second, NeighborWorks will be contributing \$60,000 to this effort for travel and shared lodging for the 50 demand-response training opportunities for IHBG staff to attend coursework at the NeighborWorks

Training Institute. Third, the demand-response online offerings (e-learning and virtual classroom) will provide a cost-effective way for IHBG recipient staff to access training without having to travel or spend significant time outside their offices. Finally, as noted above, this program will be leveraging the enormous capacity of the NeighborWorks Training Division with its more than 60 staff of expert curriculum managers (one for each of our eight training tracks and several in the homeownership education, counseling and lending training area), curriculum production specialists, meeting planners, operations personnel, online curriculum manager, and adult education and curriculum designers.

Quality Control

AAHA and its partners have a detailed plan to ensure that all of the training and TA products developed and delivered under this proposal are accurate and of the highest quality. The AAHA board of directors will review the project plan and periodic accomplishment reports to ensure staff and partner accountability and to make adjustments in work plans as appropriate. The board will review any issues that may arise and will develop a plan on how to correct deficiencies and decide how issues will be addressed. The AAHA training committee will provide oversight and direction to its staff and partners to ensure Alaska specific issues are being addressed. The training committee will review and approve the AAHA training materials prior to sending the materials to HUD ONAP for review. Upon completion of the AAHA training courses and the provision of technical assistance, the training committee will review course and TA evaluations to ensure objectives were achieved and to incorporate relevant suggestions for improvement.

Quality Control: Relevancy of Statutory and Regulatory Information: In order to ensure that all statutory, regulatory and other capacity building guidance is accurate and up-to-date, AAHA will work closely with HUD and the organization's team of technical assistance providers as new and refined TA and course materials are developed. The AAHA administrator and program manager will monitor the Code of Federal Regulations, the HUD ONAP website, the HUD PIH One-Stop Tool, and other relevant information and policy circulars to keep track of any new and updated statutory and regulatory requirements.

Quality Control-Needs Assessments and Technical Assistance: Once approved, AAHA TA providers will work with IHBG TA recipients to create TA Action plans. These plans will outline the goals of the TA and serve as an accountability tool for both the TA provider and recipient. The action plan will also be used as a tool for checking progress over the duration of the TA engagement. Lastly, the program manager will periodically check in with the IHBG TA recipient, to ensure that their TA process is going smoothly, and work with both the TA provider and recipient to resolve any outstanding issues.

Quality Control: NeighborWorks Group Learning: Prior to the delivery of any place based group learning activity, the program manager will convene a planning call with the NeighborWorks Native American Community Development (NACD) Training Manager and TA providers to discuss content updates, strategy, issues and solutions. For NTI training slots, eligible recipients who elect and are approved to use a training slot will have access to a course advising session with a team member to ensure that they have selected the best courses for their learning agenda. If this recipient is also receiving technical assistance, the program manager will coordinate a call between the recipient's TA provider and NeighborWorks, to ensure the best course selection possible. The recipient will be given the contact information for the NeighborWorks NACD Training Manager as a point of contact should they have any issues while at the NTI.

Table 11: Quality Control Process

T&TA Component	Quality Control Process
Needs Assessment	<ul style="list-style-type: none"> • AAHA responds to HUD request within 72 hours or three business days if request falls on a Thursday or Friday. • For group training, AAHA program manager makes sure needs assessment includes questions about the need for accommodation under ADA. Reasonable accommodations can be made with adequate notice • AAHA receives approval from HUD ONAP to implement and delivers services according to the approved work plan
Direct Technical Assistance	<ul style="list-style-type: none"> • TA providers assigned based on outcome of the needs assessment and approved work plan. • Use needs assessment and approved work plan, and Organizational TA Work Plan to establish goals, timeline, milestones and accountability and monitor progress • AAHA evaluates TA engagement using the goals, milestones and Timeline identified in Organizational TA Work Plan • AAHA program manager checks in with eligible recipient to ensure TA engagement is proceeding as scheduled with no complaints and addresses issues as they arise
Materials and Tools Development	<ul style="list-style-type: none"> • Materials will be refined using experts. Refinements will be approved by AAHA and HUD ONAP before the materials are used or disseminated
Group Learning	
AAHA Training Program	<ul style="list-style-type: none"> • Course approved by AAHA Training Committee and HUD ONAP • Planning call with AAHA staff and instructors to go over lesson plan and learning objectives • Training programs evaluated – relevant feedback incorporated to make improvements
NeighborWorks Training Program	<ul style="list-style-type: none"> • PBT and virtual classroom courses selected as determined by needs assessment and approved by HUD ONAP • AAHA program manager (using needs assessment) ensures that eligible participants are in the best course • AAHA program manager ensures reasonable accommodation (under ADA) are addressed for identified learners • NACD Training Manager with advisement from AAHA holds planning call with other training managers and faculty consultant(s) to go over lesson plan and learning objectives • Training programs evaluated- relevant feedback incorporated to make improvements

As it does with its current training initiatives, AAHA will have a process in place to cure any eligibility or product quality issues that may arise. The AAHA Statewide Administrator will conduct weekly meetings with the project manager to ensure all administrative controls are in place with all contractors. In addition, AAHA staff will continue monthly meetings with its training committee to review proposed trainings and to

ensure they are accurate and relevant to Alaska. In order to accommodate this increased activity, AAHA plans to expand its training committee to include at least two additional board members.

Table 12: Cures to Eligibility or Product Quality

T&TA Component	Issue	Cure
Needs Assessment	Ineligible applicant requests services or is provided services	Ensure eligibility by making sure they are IHBG recipient. If they are not a recipient, and are able to somehow receive services, services will be halted immediately and investigate how they were able to receive services and close any identified gaps in the eligibility process
Direct Technical Assistance	TA Provider and IHBG recipient do not have a productive relationship (can include issues such as non-responsiveness, lack of follow through, etc)	Program manager will interview both recipient and TA provider to get to the root cause of the problem. Program manager will either re-assign a new TA provider or help eligible recipient determine if TA is the best approach at that time and suggest other remedies including training.
Materials, Tools, and Courses	Materials are not accurate	Materials will be vetted and approved before being produced. Errors found after the production of materials will be corrected and re-produced accordingly.
	Materials are poor in quality	Materials will be reproduced using the highest standards. To ensure high quality production, all course materials are required to be submitted in a digital electronic format.
Group Learning		
AAHA Training Program	Accessibility Issues	AAHA will only contract with venues that are all ADA accessible from a mobility standpoint. In cases of hearing or vision impairment, AAHA will ensure reasonable accommodation as long as proper notice is provided.
	Complaints	Complaints will be resolved as best as possible depending on the nature of the complaint. Eligible recipients

		will be able to contact the administrator or program manager to discuss and resolve their issues. If complaints are not able to be resolved at the staff level, they may be elevated to the Training Committee and, ultimately, the Board of Directors.
NeighborWorks Training Program	<p>Accessibility Issues</p> <p>Complaints</p>	<p>NeighborWorks only contracts with venues that are all ADA accessible from a mobility standpoint. In cases of hearing or vision impairment, NeighborWorks will ensure reasonable accommodation as long as proper notice is provided to NeighborWorks. Language Access: several staff members are fluent in Spanish and French</p> <p>Complaints will be resolved as best as possible depending on the nature of the complaint. Eligible recipients will be provided with a customer care number that they can call to express any concerns they have. In addition, recipients will be able to go the registration or training offices to secure any assistance they need.</p>

Regional Priority

The Association of Alaska Housing Authorities is located in the Alaska Area ONAP region and proposes to provide training and technical assistance solely to beneficiaries within this region.

Alaska is home to a dynamic and diverse mix of tribes and tribal organizations. Approximately 80,000 tribal members make up the 229 tribes in Alaska. Nearly 40 percent of all tribes in the United States are in Alaska, with over 200 remote village communities spread across a state that is more than twice the size of Texas. Alaska's vast geography is often difficult to comprehend. Place a map of Alaska on a map of the contiguous U.S., and it will overlie San Francisco, California; Fargo, North Dakota; and Jacksonville, Florida.

With fewer paved roads than any other state, Alaska's rural communities face significant challenges and lack essential connectivity to training resources that would ultimately enhance tribal capacity and benefit tribal members. Most Alaska villages are not located on the road system and are only accessible by plane or boat. Such access is expensive and dependent on weather conditions. Typically, a person cannot drive to the "nearest" town from their village to attend group training, unlike the situation in most other states. In

Alaska, the town nearest many of Alaska's remote communities can be a several hours away by plane or boat.

The very characteristics that distinguish the State of Alaska – vibrant cultural diversity and geographic expansiveness – are often the primary barriers to the delivery of effective and relevant training and capacity building opportunities for Alaskan tribes. Limited access to regionally relevant training greatly stifles tribal capacity, inhibits the development of expertise, and limits opportunities to maximize funding, all of which ultimately affect the tribal population. The extreme and disproportionate lack of relevant training opportunities for Alaska Native tribes significantly impacts the availability of resources and the ability of staff to identify grant opportunities, prepare funding applications, and gain access to professional consulting expertise. Many tribes in rural Alaska lack capacity to satisfy program requirements or successfully apply/compete for funding due to a limited workforce, a lack of computer skills and technology, insufficient experience, and transportation barriers.

The primary funding source for Alaska's regional housing authorities (RHAs) is the federal Indian Housing Block Grant, authorized by the Native American Housing Assistance and Self-Determination Act. As Alaska's RHAs have matured, they have diversified their revenue streams and expanded programs and capacity. Some of the larger RHAs have used leveraging strategies to greatly increase the number of low-income Alaska Native/American Indian families they serve, strengthening local housing markets while reducing both overcrowding and substandard housing conditions. In contrast, very small, remote village communities have much higher levels of overcrowding; 63 percent of all the homes in Alaska deemed to be in "unsalvageable condition" or "falling apart" are located in rural Alaska, most of them in remote village communities. The lack of regionally relevant technical assistance to support tribal capacity building, including the development of leveraging strategies, has contributed to extreme housing shortages, substandard housing stock, and financial inequity and instability throughout rural Alaska.

In July 2010, the Denali Commission, in coordination with federal partners and at the request of U.S. Senator Mark Begich, released *Sustainable Rural Communities*, a report offering specific tactics to increase sustainability in Alaska's rural communities. Following diligent analysis and investigation, two conclusions of the report were the need for regional information forums and a technical assistance clearinghouse for technical assistance needs. In the 2011 report update, training was a critical need identified through the public comment process. These types of trainings would help rural communities build capacity and promote long-term sustainability. Additionally, the development of sustainable rural communities requires local involvement in all phases of planning, design and construction of any infrastructure or program. Regionally based training and technical assistance is essential in providing Alaska Native communities the mechanism for critically necessary community involvement, as well as a means to increase that involvement if necessary.

In addition, the recent completion of TERRA-Southwest, an \$88 million terrestrial broadband "middle mile" project that provides connectivity to 65 remote, rural communities in Bristol Bay and the Yukon-Kuskokwim Delta, expands opportunities to deliver web based/virtual training to rural village communities. Best practices suggest a local approach to training and technical assistance will be most likely to achieve beneficial economies of scale, expand coordinated regional planning efforts, and promote sustainability for Alaska's tribal communities. In varying forums, most tribes have indicated that training and TA programming should be based upon familiar cultural values and practices to facilitate tribal engagement and achieve successful outcomes. Further, a regionalized model can address specific barriers often overlooked by national-level training and TA delivery, including extreme geographic isolation, topographic and climate-related factors that require complex development strategies, and the unique localized funding

environment. The regionalization of training and technical assistance for Indian Housing is an evolutionary step in the right direction.

Rating Factor #3: Leverage

In developing this proposal, AAHA took great care to develop a T&TA team that would deliver impact and results to eligible IHGB recipients in the Alaska region, while leveraging already available resources. In addition to partnering with TA providers who are experts in Alaska housing and community development, AAHA has partnered with NeighborWorks to give the region access to: cutting edge training, resources, and access to networking, best practices and peer learning. AAHA believes that by providing these training and tools to eligible recipients in Alaska, organizations will be able to better leverage Indian Housing Block Grant dollars to improve existing and create new affordable housing stock and to strengthen their respective communities' long range outcomes that support both HUDs policy priorities and strategic plan goals for FYs 2010-15.

Leveraging Existing Resources: AAHA will provide \$15,000 in in-kind marketing services including electronic newsletters, flyer production and promotions through AAHA's website.

Partnerships as a means of leverage and cost savings: One of the major benefits of the partnership with NeighborWorks is their impressive array of training courses. NeighborWorks offers over 200 community development courses in eight different learning tracks. Access to over 60 introductory, intermediate and advanced homeownership and community lending courses are offered through the NeighborWorks Center for Homeownership Education and Counseling (NCHEC).

Another major benefit of the partnership with NeighborWorks is that eligible recipients will have access to professional development, networking and certification programs. NeighborWorks offers a number of professional certificate programs. The basic requirements for certification include taking required courses, passing the corresponding exams and either passing a final exam or written capstone project. Some professional certificate programs may be completed in as few as three training events. Professional Certificate Programs include:

- Affordable Housing (specializations in funding and finance, project management, community stabilization, supportive housing or community land trusts)
- Consortium for Housing and Asset Management (CHAM®) Designation Certification
- Community Economic Development
- Community Engagement
- Community and Neighborhood Revitalization
- Construction and Production Mgt (specializations in rehabilitation, construction manager)
- Management and Leadership (specialization in development or organizational leadership)
- Homeownership and Community Lending (specializations include: general housing counseling, homebuyer education programs, foreclosure prevention, post purchase education, and housing counseling program management)

As was noted previously, this proposal draws upon an extensive existing NeighborWorks course catalogue that has already been developed and continually updated and revised over the years. This is a resource that this program will not have to develop. Conservatively estimating that IHGB recipients access just 32 of the more than 200 courses available – and many more than this will almost certainly be accessed - there will have been **more than \$585,000** in course development and updates and refinement of those courses over the years that will be leveraged by this program!

Providing travel grants to eligible recipients: An important aspect of this proposal is the availability of the 50 demand-response opportunities to take courses at NeighborWorks Training Institutes.

Understanding that travel may be cost prohibitive for many TDHEs and tribes in the Alaska region, NeighborWorks will cover the travel and shared lodging for each of these fifty NTI training attendees. The value of this travel and lodging is approximate \$60,000. The leverage breakdown is shown in Table 13 below.

Table 13: Leverage Breakdown

Applicant		
AAHA- In Kind Marketing		\$15,000
NeighborWorks- NTI Developed Courses		\$360,000
NeighborWorks- developed eLearning Courses		\$200,000
NeighborWorks- Developed Virtual Classroom Course		\$25,000
NeighborWorks- Travel and Lodging to NTIs		\$60,000
Total Leverage		\$660,000
Total Program Cost		\$999,685
Leverage Ratio		66%

Per the breakdown above, AAHA and its partners will provide a total of \$660,000 in leveraged resources. This results in 66 cents leveraged (leverage ratio of 66%) for every HUD dollar provided for training and TA services.

Rating Factor 4: Program Evaluation

AAHA proposes a monitoring and evaluation system that will ensure the highest quality training and technical assistance delivery. Using a combination of formal and informal evaluations, staff, contractors and consultants will monitor the program's effectiveness and make improvements as necessary. As part of the comprehensive evaluation process, AAHA will:

- Gather baseline data during the needs assessment process to determine where each IHBG recipient is in their individual/organization development;
- Develop and use custom training and technical assistance evaluation forms which incorporate a set of key indicators to specifically track progress made towards the enhanced capacity of IHBG recipients;
- Conduct periodic check-ins with IHBG TA recipients. These check-ins will provide an opportunity for IHBG TA recipients to provide direct and immediate feedback on their experience, identifying what is working well and what may be missing
- Complete a program evaluation with each training and TA participant; and
- Complete a final program assessment which will summarize short-term impacts of the program.

Examples of some of the key outcomes that we will measure as proof of effectiveness include:

Direct TA

- percentage of participants that rate TA as meeting expectations or better
- percentage of participants that implement action plans within 3 months, within 6 months, within 12 months

Group Learning

- 85% or better of IHBG recipients rate the courses, materials and tools as "meets expectations or exceeds expectations"
- percentage of small tribes that felt the trainings were relevant to their needs
- percentage of large tribes that felt the trainings were relevant to their needs

Courses, Materials and Tools:

- 85% or better of IHBG recipients rate the courses, materials and tools as "meets expectations or exceeds expectations"
- percentage of small tribes that felt the trainings were relevant to their needs
- percentage of large tribes that felt the trainings were relevant to their needs

Technical Assistance Evaluation

AAHA's TA evaluation plan will seek to measure the results of the initiative rather than just the number of people served. The program manager will track the completion of the TA action plan. Upon completion of the TA engagement, the program manager will analyze the TA plan to determine how many of the action plan goals have been achieved. In addition, AAHA will require monthly reports from TA providers to ensure ongoing evaluation of the TA process. AAHA will obtain an evaluation of technical assistance provided from each entity that receives technical assistance.

Training Evaluation

NeighborWorks Group Learning Evaluation Process:

Building skills, core competencies, and shaping the abilities of the individual staff member promotes the efficiency of the organization and yields positive change in the community. To gain an understanding of the impact of the training conducted, NeighborWorks utilizes a variety of methods to gauge a participant's experience. Key factors include:

- Demonstrating an increase in knowledge by passing class exams

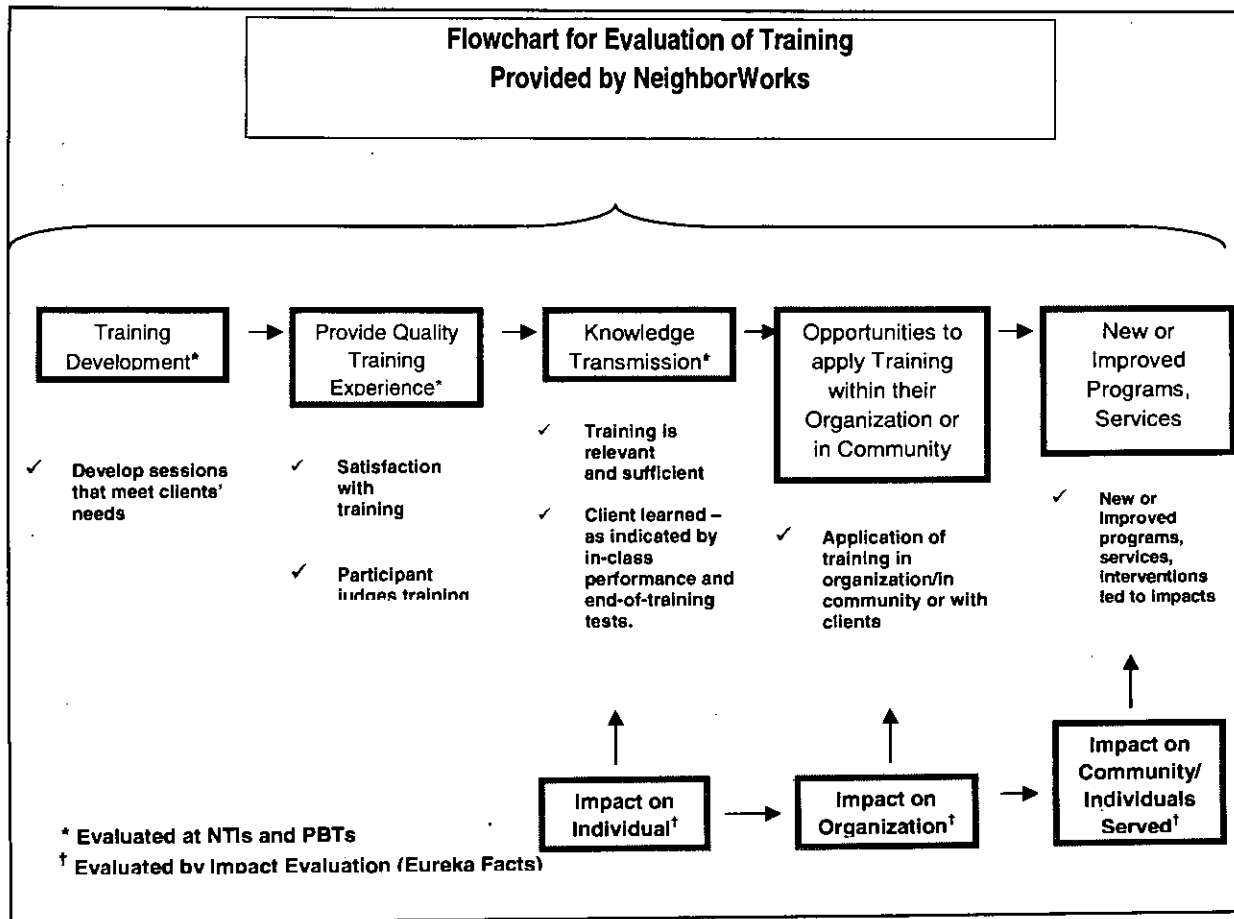
- Improved level of knowledge - before and after taking the course
- Improved ability to serve customers based on knowledge acquired

For example, in their last independent impact survey, 95% of survey respondents reported they have used or are currently using new knowledge, skills, practices or strategies that they specifically attribute to the courses at taken at a NeighborWork's training.

NeighborWorks will closely monitor the soundness of the training it provides to IHBG recipients at NTIs and regional and Alaska PBTs and has a multi-tiered process for evaluating the success of their training programs. NeighborWorks will apply the following evaluation protocol to its training program to ensure that desired results are achieved. The figure, Evaluation Flowchart, below, outlines the steps NeighborWorks uses to assess the effectiveness of its training. The model involves various stages, moving from left to right. Each one builds on the accomplishments of the previous steps. NeighborWorks will measure the success of the first three stages (training development, provide quality training experience and initial knowledge transmission) through the following measures:

1. **Evaluations will be administered** to all NTI, PBT and e-learning participants at the end of the final day of training. These evaluations ask participants to assess the effectiveness of the training in achieving the objectives of the course, in building their skills and knowledge, the usefulness of materials and the degree to which the knowledge they acquired from the course will have an impact on their work. Specifically, trainees are asked (a) the effectiveness of the training in building the trainee's knowledge and skills and (b) the degree to which the knowledge they acquired from the course will have an impact on their work.
2. NeighborWorks will **provide online final exams** for NeighborWorks certification courses, all online courses, and a selected number of other courses. Participants must demonstrate proficiency with a test score of 70 percent or better (80% for homeownership courses) within 30 days of completing the course. Taking the course exam online allows participants to see their test scores immediately, review questions answered incorrectly and measure the degree to which they learned what the course was designed to teach. These tests are rigorous to ensure participants capture the key elements required within each curriculum. With effective interactive instruction, and often additional tutoring by instructors, **90 percent of attendees** who take the exam will pass the tests. This helps to strengthen lessons learned from the course. Online testing has proven to be an efficient, cost-effective approach to administering and scoring exams.
3. The "Flowchart for Evaluation of Training Provided at NTIs and PBTs" is provided below. The Training Impact Evaluation measures the impact the training sessions had on the trainee, his/her organization, and the community/individuals served 3 to 12 months following the completion of the training. The evaluation assesses a longer-term measure of knowledge and skill transmission as perceived by the training participant after the training experience, and the application of that knowledge by participants within their own organizations and/or in the community. The final stage in the process evaluates the degree to which the participant reports that the training has led to new and improved services.

Figure 1: Evaluation Flowchart



End of Program Evaluation

By the end of this program, AAHA will provide an assessment of the reach of the training program by reporting first on the number of IHBG recipient staff that were trained, how many organizations were benefited and how many certificates were earned. It is anticipated the program will result in:

- 350 practitioners receiving training (possibly as many as 380).
- At least 700 professional training completion certificates earned.

At the 12-month milestone of this initiative, AAHA will evaluate the overall effectiveness of the training and TA program by administering an electronic survey to all clients served, using an online survey system. In addition to asking qualitative questions asking for general feedback and opinions about the overall effectiveness of the initiative, AAHA will gather data about the following types of metrics:

- Percentage of participants who have applied learning on the job
- Percentage of participants who found the training/TA to be relevant and practical
- Percentage of managers who found an increase in job efficiency after participation in the initiative
- Percentage of participants who found the initiative to meet their expectations
- Percentage of participants who have increased their knowledge of the pre-development process
- Percentage of participants who have increased their knowledge of leveraging IHBG funds

- Percentage of small tribe participants who have increased the capacity of their organizations as a result of the program

For those recipients who do not have reliable internet access, surveys may be conducted over the phone or in person and these surveys will be entered into the system manually. Data integrity of the manual entries will be maintained by coding each paper survey to its record number in the online survey management system and by having a different person (than the survey administrator) enter the data into the system.

A survey management plan will be developed and managed by the program manager to ensure a meaningful number of respondents. Individualized survey links will be sent out to each recipient to make sure that there is only one survey response for each IHBG recipient at the individual level (*please note that TA evaluations will be able to measure program effectiveness at the organizational level*).

Grant Applications Detailed Budget

U.S. Department of Housing
and Urban Development

OMB Number: 2501-0017
Expiration Date: 03/31/2011

Organization Name:

Association of Alaska Housing Authorities, The

Project/Activity Name:

A Regional Training Approach for Alaska

	Functional Categories										All Years
	Column 1	Column 2	Column 3	Column 4	Column 5	Column 6	Column 7	Column 8	Column 9		
	HUD Share (\$)	Applicant Match (\$)	Other HUD Funds (\$)	Other Fed Share (\$)	State Share (\$)	Local/Tribal Share (\$)	Other Share (\$)	Program Income (\$)	Total (\$)		
a. Personnel (Direct Labor)	51,260.00						262,500.00				
b. Fringe Benefits	20,440.00										
c. Travel	3,262.50						60,000.00				
d. Equipment (only items > \$5,000 depreciated value)											
e. Supplies (only items < \$5,000 depreciated value)											
f. Contractual	424,140.00	7,500.00									
g. Construction											
1. Administration and Legal Expenses											
2. Land, Structures, Rights-of-Way, Appraisals, etc.											
3. Relocation Expenses and Payments											
4. Architectural and Engineering Fees											
5. Other Architectural and Engineering Fees											
6. Project Inspection Fees											
7. Site Work											
8. Demolition and Removal											
9. Construction											
10. Equipment											
11. Contingencies											
12. Miscellaneous											
h. Other Direct Costs	740.00										
i. Subtotal of Direct Costs	499,842.50										
j. Indirect Costs (% Approved Indirect Cost Rate: <input type="text"/> %)											
Grand Total (Year <input type="text"/> 1):										499,842.50	
Grand Total (All Years):										999,685.00	

Grant Applications Detailed Budget

U.S. Department of Housing
and Urban Development

OMB Number: 2501-0017
Expiration Date: 03/31/2011

Organization Name:

Association of Alaska Housing Authorities, The

Project/Activity Name:

A Regional Training Approach for Alaska

	Functional Categories										Year 1: <input type="checkbox"/> Year 2: <input checked="" type="checkbox"/> Year 3: <input type="checkbox"/> All Years: <input type="checkbox"/>		
	Column 1	Column 2	Column 3	Column 4	Column 5	Column 6	Column 7	Column 8	Column 9				
	HUD Share (\$)	Applicant Match (\$)	Other HUD Funds (\$)	Other Fed Share (\$)	State Share (\$)	Local/Tribal Share (\$)	Other Share (\$)	Program Income (\$)	Total (\$)				
a. Personnel (Direct Labor)	51,260.00						262,500.00						
b. Fringe Benefits	20,440.00												
c. Travel	3,262.50						60,000.00						
d. Equipment (only items > \$5,000 depreciated value)													
e. Supplies (only items < \$5,000 depreciated value)													
f. Contractual	424,140.00	7,500.00											
g. Construction													
1. Administration and Legal Expenses													
2. Land, Structures, Rights-of-Way, Appraisals, etc.													
3. Relocation Expenses and Payments													
4. Architectural and Engineering Fees													
5. Other Architectural and Engineering Fees													
6. Project Inspection Fees													
7. Site Work													
8. Demolition and Removal													
9. Construction													
10. Equipment													
11. Contingencies													
12. Miscellaneous													
h. Other Direct Costs	740.00												
i. Subtotal of Direct Costs	499,842.50												
j. Indirect Costs (% Approved Indirect Cost Rate: <input type="text"/> %)													
Grand Total (Year <input type="text"/> 2):									499,842.50				
Grand Total (All Years):									999,685.00				

Tracking Number: GRANT11250561

Funding Opportunity Number: FR-5600-N-37 Received Date: 2012-10-16T12:03:01-04:00
Form HUD-424-CB (1/2004)

Application for Federal Assistance SF-424

*** 1. Type of Submission:**

- ☐ Preapplication
☒ Application
☐ Changed/Corrected Application

*** 2. Type of Application:**

- ☒ New
☐ Continuation
☐ Revision

*** If Revision, select appropriate letter(s):**

*** Other (Specify):**

*** 3. Date Received:**

10/16/2012

4. Applicant Identifier:

5a. Federal Entity Identifier:

5b. Federal Award Identifier:

State Use Only:

6. Date Received by State:

7. State Application Identifier:

8. APPLICANT INFORMATION:

*** a. Legal Name:** Association of Alaska Housing Authorities, The

*** b. Employer/Taxpayer Identification Number (EIN/TIN):**

92-0070125

*** c. Organizational DUNS:**

0693431060000

d. Address:

*** Street1:** 4300 Boniface Pkwy. Suite 190

Street2:

*** City:** Anchorage

County/Parish:

*** State:** AK: Alaska

Province:

*** Country:** USA: UNITED STATES

*** Zip / Postal Code:** 99504-4317

e. Organizational Unit:

Department Name:

Division Name:

f. Name and contact information of person to be contacted on matters involving this application:

Prefix: Ms. *** First Name:** Heather

Middle Name: Marie

*** Last Name:** Arnett

Suffix:

Title: Chief Executive Officer

Organizational Affiliation:

Administrator

*** Telephone Number:** (907) 338-3970

Fax Number: (907) 338-4904

*** Email:** aaha@alaska.net

Application for Federal Assistance SF-424

*** 9. Type of Applicant 1: Select Applicant Type:**

E: Regional Organization

Type of Applicant 2: Select Applicant Type:

M: Nonprofit with 501C3 IRS Status (Other than Institution of Higher Education)

Type of Applicant 3: Select Applicant Type:

*** Other (specify):**

*** 10. Name of Federal Agency:**

US Department of Housing and Urban Development

11. Catalog of Federal Domestic Assistance Number:

14.893

CFDA Title:

Office of Native American Programs Training and Technical Assistance for Indian Housing Block Grant Program

*** 12. Funding Opportunity Number:**

FR-5600-N-37

*** Title:**

Office of Native American Training and Technical Assistance

13. Competition Identification Number:

TTA-37

Title:

14. Areas Affected by Project (Cities, Counties, States, etc.):

Add Attachment

Delete Attachment

View Attachment

*** 15. Descriptive Title of Applicant's Project:**

Proposal for HUD Office of Native American Programs Training and Technical Assistance
A Regional Training Approach for Alaska - submitted by the Association of Alaska Housing
Authorities

Attach supporting documents as specified in agency instructions.

Add Attachments

Delete Attachments

View Attachments

Application for Federal Assistance SF-424**16. Congressional Districts Of:*** a. Applicant b. Program/Project

Attach an additional list of Program/Project Congressional Districts if needed.

[Add Attachment](#)[Delete Attachment](#)[View Attachment](#)**17. Proposed Project:*** a. Start Date: * b. End Date: **18. Estimated Funding (\$):**

* a. Federal	<input type="text" value="999,685.00"/>
* b. Applicant	<input type="text" value="15,000.00"/>
* c. State	<input type="text" value="0.00"/>
* d. Local	<input type="text" value="0.00"/>
* e. Other	<input type="text" value="645,000.00"/>
* f. Program Income	<input type="text" value="0.00"/>
* g. TOTAL	<input type="text" value="1,659,685.00"/>

*** 19. Is Application Subject to Review By State Under Executive Order 12372 Process?**

- ☐ a. This application was made available to the State under the Executive Order 12372 Process for review on
- ☐ b. Program is subject to E.O. 12372 but has not been selected by the State for review.
- ☒ c. Program is not covered by E.O. 12372.

*** 20. Is the Applicant Delinquent On Any Federal Debt? (If "Yes," provide explanation in attachment.)**☐ Yes ☒ No

If "Yes", provide explanation and attach

[Add Attachment](#)[Delete Attachment](#)[View Attachment](#)

21. *By signing this application, I certify (1) to the statements contained in the list of certifications and (2) that the statements herein are true, complete and accurate to the best of my knowledge. I also provide the required assurances** and agree to comply with any resulting terms if I accept an award. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 218, Section 1001)**

☒ ** I AGREE

** The list of certifications and assurances, or an internet site where you may obtain this list, is contained in the announcement or agency specific instructions.

Authorized Representative:

Prefix: * First Name:

Middle Name:

* Last Name:

Suffix:

* Title: * Telephone Number: Fax Number: * Email: * Signature of Authorized Representative: * Date Signed:

ATTACHMENTS FORM

Instructions: On this form, you will attach the various files that make up your grant application. Please consult with the appropriate Agency Guidelines for more information about each needed file. Please remember that any files you attach must be in the document format and named as specified in the Guidelines.

Important: Please attach your files in the proper sequence. See the appropriate Agency Guidelines for details.

1) Please attach Attachment 1	AAHAProposaltoHUDONAP.docx	Add Attachment	Delete Attachment	View Attachment
2) Please attach Attachment 2	AAHAProposaltoHUDONAPAppABCD	Add Attachment	Delete Attachment	View Attachment
3) Please attach Attachment 3		Add Attachment	Delete Attachment	View Attachment
4) Please attach Attachment 4		Add Attachment	Delete Attachment	View Attachment
5) Please attach Attachment 5		Add Attachment	Delete Attachment	View Attachment
6) Please attach Attachment 6		Add Attachment	Delete Attachment	View Attachment
7) Please attach Attachment 7		Add Attachment	Delete Attachment	View Attachment
8) Please attach Attachment 8		Add Attachment	Delete Attachment	View Attachment
9) Please attach Attachment 9		Add Attachment	Delete Attachment	View Attachment
10) Please attach Attachment 10		Add Attachment	Delete Attachment	View Attachment
11) Please attach Attachment 11		Add Attachment	Delete Attachment	View Attachment
12) Please attach Attachment 12		Add Attachment	Delete Attachment	View Attachment
13) Please attach Attachment 13		Add Attachment	Delete Attachment	View Attachment
14) Please attach Attachment 14		Add Attachment	Delete Attachment	View Attachment
15) Please attach Attachment 15		Add Attachment	Delete Attachment	View Attachment

Facsimile Transmittal

1350342559-2958

U. S. Department of Housing
and Urban Development
Office of Department Grants
Management and Oversight

OMB Number: 2525-0118
Expiration Date: 06/30/2011

Name of Document Transmitting: A regional training approach for Alaska

1. Applicant Information:

Legal Name: Association of Alaska Housing Authorities, The

Address:

Street1: 4300 Boniface Pkwy. Suite 190

Street2:

City: Anchorage

County:

State: AK: Alaska

Zip Code: 99504-4317

Country: USA: UNITED STATES

2. Catalog of Federal Domestic Assistance Number:

Organizational DUNS: 0693431060000

CFDA No.: 14.893

Title: Office of Native American Programs Training and Technical Assistance for Indian Housing Block Grant Program

Program Component:

Category One

3. Facsimile Contact Information:

Department:

Division:

4. Name and telephone number of person to be contacted on matters involving this facsimile.

Prefix: Ms. First Name: Heather

Middle Name: Marie

Last Name: Arnett

Suffix:

Phone Number: (907) 338-3970

Fax Number: (907) 338-4904

5. Email: aaha@alaska.net

6. What is your Transmittal? (Check one box per fax)

☐ a. Certification ☐ b. Document ☐ c. Match/Leverage Letter ☒ d. Other

7. How many pages (including cover) are being faxed?

1

Form HUD-96011 (10/12/2004)

DISCLOSURE OF LOBBYING ACTIVITIES

Complete this form to disclose lobbying activities pursuant to 31 U.S.C.1352

Approved by OMB
0348-0046

1. * Type of Federal Action: <input type="checkbox"/> a. contract <input type="checkbox"/> b. grant <input checked="" type="checkbox"/> c. cooperative agreement <input type="checkbox"/> d. loan <input type="checkbox"/> e. loan guarantee <input type="checkbox"/> f. loan insurance	2. * Status of Federal Action: <input type="checkbox"/> a. bid/offer/application <input checked="" type="checkbox"/> b. initial award <input type="checkbox"/> c. post-award	3. * Report Type: <input checked="" type="checkbox"/> a. initial filing <input type="checkbox"/> b. material change
4. Name and Address of Reporting Entity: <input checked="" type="checkbox"/> Prime <input type="checkbox"/> SubAwardee * Name: Association of Alaska Housing Authorities * Street 1: 4300 Boniface Pkwy. Suite 190 Street 2: _____ * City: Anchorage State: AK: Alaska Zip: 99504 Congressional District, if known: Alaska		
5. If Reporting Entity in No.4 is Subawardee, Enter Name and Address of Prime: 		
6. * Federal Department/Agency: HUD Office of Native American Programs	7. * Federal Program Name/Description: Office of Native American Programs Training and Technical Assistance for Indian Housing Block Grant Program CFDA Number, if applicable: 14.693	
8. Federal Action Number, if known: _____	9. Award Amount, if known: \$ _____	
10. a. Name and Address of Lobbying Registrant: Prefix _____ * First Name: NONE Middle Name: _____ * Last Name: NONE Suffix: _____ * Street 1: _____ Street 2: _____ * City: _____ State: _____ Zip: _____		
b. Individual Performing Services (including address if different from No. 10a) Prefix _____ * First Name: NONE Middle Name: _____ * Last Name: NONE Suffix: _____ * Street 1: _____ Street 2: _____ * City: _____ State: _____ Zip: _____		
11. Information requested through this form is authorized by title 31 U.S.C. section 1352. This disclosure of lobbying activities is a material representation of fact upon which reliance was placed by the tier above when the transaction was made or entered into. This disclosure is required pursuant to 31 U.S.C. 1352. This information will be reported to the Congress semi-annually and will be available for public inspection. Any person who fails to file the required disclosure shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure. * Signature: Heather Arnett * Name: Prefix Ms. * First Name: Heather Middle Name: Marie * Last Name: Arnett Suffix: _____ Title: Chief Executive Officer Telephone No.: 907-338-3970 Date: 10/16/2012		
Federal Use Only:		Authorized for Local Reproduction Standard Form - LLL (Rev. 7-97)

Applicant/Recipient Disclosure/Update Report

U.S. Department of Housing
and Urban Development

OMB Number: 2510-0011
Expiration Date: 10/31/2012

Applicant/Recipient Information

* Duns Number: 0693431060000

* Report Type: INITIAL

1. Applicant/Recipient Name, Address, and Phone (include area code):

* Applicant Name:

Association of Alaska Housing Authorities, The

* Street1: 4300 Boniface Pkwy. Suite 190

Street2:

* City: Anchorage

County:

* State: AK: Alaska

* Zip Code: 99504-4317

* Country: USA: UNITED STATES

* Phone: (907) 338-3970

2. Social Security Number or Employer ID Number: 92-0070125

* 3. HUD Program Name:

Office of Native American Programs Training and Technical Assistance for Indian Housing Block Grant Program

* 4. Amount of HUD Assistance Requested/Received: \$ 999,685.00

5. State the name and location (street address, City and State) of the project or activity:

* Project Name: A Regional Training Approach for Alaska

* Street1: 4300 Boniface Pkwy. Suite 190

Street2:

* City: Anchorage

County:

* State: AK: Alaska

* Zip Code: 99504-4317

* Country: USA: UNITED STATES

Part I Threshold Determinations

* 1. Are you applying for assistance for a specific project or activity? These terms do not include formula grants, such as public housing operating subsidy or CDBG block grants. (For further information see 24 CFR Sec. 4.3).

☒ Yes

☐ No

* 2. Have you received or do you expect to receive assistance within the jurisdiction of the Department (HUD), involving the project or activity in this application, in excess of \$200,000 during this fiscal year (Oct. 1-Sep. 30)? For further information, see 24 CFR Sec. 4.9

☒ Yes

☐ No

If you answered " No " to either question 1 or 2, **Stop!** You do not need to complete the remainder of this form.

However, you must sign the certification at the end of the report.

Form HUD-2880 (3/99)

Part II Other Government Assistance Provided or Requested / Expected Sources and Use of Funds.

Such assistance includes, but is not limited to, any grant, loan, subsidy, guarantee, insurance, payment, credit, or tax benefit.

Department/State/Local Agency Name:

* Government Agency Name:

Not applicable

Government Agency Address:

* Street1: Not applicable

Street2:

* City: Not applicable

County:

* State: AK: Alaska

* Zip Code: 99504

* Country: USA: UNITED STATES

* Type of Assistance: Not applicable

* Amount Requested/Provided: \$ 0.00

* Expected Uses of the Funds:

Not applicable

Department/State/Local Agency Name:

* Government Agency Name:

Not applicable

Government Agency Address:

* Street1: Not applicable

Street2:

* City: Not applicable

County:

* State: AK: Alaska

* Zip Code: 99504

* Country: USA: UNITED STATES

* Type of Assistance: Not applicable

* Amount Requested/Provided: \$ 0.00

* Expected Uses of the Funds:

Not applicable

(Note: Use Additional pages if necessary.)

Add Attachment

Delete Attachment

View Attachment

Part III Interested Parties. You must decide.

1. All developers, contractors, or consultants involved in the application for the assistance or in the planning, development, or implementation of the project or activity and

2. Any other person who has a financial interest in the project or activity for which the assistance is sought that exceeds \$50,000 or 10 percent of the assistance (whichever is lower).

* Alphabetical list of all persons with a reportable financial interest in the project or activity (For individuals, give the last name first)	* Social Security No. or Employee ID No.	* Type of Participation in Project/Activity	* Financial Interest in Project/Activity (\$ and %)	
NeighborWorks America	521148078	Contractor	\$ 606,000.00	61.00%
			\$	%
			\$	%
			\$	%
			\$	%

(Note: Use Additional pages if necessary.)

Add Attachment

Delete Attachment

View Attachment

Certification

Warning: If you knowingly make a false statement on this form, you may be subject to civil or criminal penalties under Section 1001 of Title 18 of the United States Code. In addition, any person who knowingly and materially violates any required disclosures of information, including intentional non-disclosure, is subject to civil money penalty not to exceed \$10,000 for each violation.

I certify that this information is true and complete.

* Signature:

* Date: (mm/dd/yyyy)

Heather Arnett

10/16/2012

Appendix C

Sample Listing of Courses and Tools

NeighborWorks® America
Sample of Relevant Course Descriptions

Homeownership and Community Lending

Course Name	Course Level	Course Length	Course Description
1. General Housing Counseling			
Homeownership Counseling Certification: Principles, Practices and Techniques Part 1 (HO250)	Intermediate	5 days	This course is for housing counselors with a minimum of one year of counseling experience providing one-on-one pre-purchase counseling to clients. Through hands-on applications, this intermediate level course teaches counselors the skills, procedures and content needed to create new homeowners. They learn how to provide one-on-one counseling sessions to address savings, credit and debt barriers to homeownership, and use the latest industry tools, including client management systems (HCO, CounselorMax), techniques and resources. They practice mortgage readiness assessment, prequalification, standardized income calculations, credit report review, action plan development, and other key counseling activities. HUD-requirements for file management, code of conduct, and operations guidelines along with implementation of the National Industry Standards for Homeownership Education and Counseling are taught.
2. Homebuyer Education Programs			
Homebuyer Education Methods: Training the Trainer Certification (HO229)	Intermediate	5 days	This pre-purchase homeownership education course is designed to teach participants how to deliver a comprehensive homebuyer education training in a group setting. Learn to use the best materials and methods to train homebuyers to shop for a home, get a mortgage loan, improve their budget and credit profiles and maintain their home and finances after purchase. Participants will engage in hands-on activities that will help them improve their facilitation skills and deliver interactive training sessions based upon adult education methodology. Participants should be fully familiar with mortgage industry terminology and processes prior to taking this class. Course HO103 should be taken as a prerequisite should they need to build their knowledge in this area. An exam is given following the course for those interested in pursuing certification in homeownership education training.
3. Foreclosure Prevention			
Foreclosure Intervention and Default Counseling Certification Part I (HO345rq)	Advanced	5 days	This advanced level five-day course is designed for counselors with one or more years of experience providing one-on-one foreclosure intervention and default counseling. This rigorous, in-depth course covers critical elements of the default and foreclosure process as well as loss mitigation options for prime and sub prime loans. Participants will engage in exercises and utilize case studies which will sharpen their negotiating skills with servicers and improve their counseling methods with clients. There are two training requirements for certification. This course is Part I. We recommend that participants complete HO109 Foreclosure Basics or HO109el Foreclosure Basics (a-learning) first. REQUIREMENT: You must pass the prerequisite test with a score of 80% or better before enrolling in this course.
4. Non-Delinquency Post Purchase			
Post-Purchase Education Methods (HO247)	Intermediate	5 days	This five-day course covers the recommended standards in design and methodology for post-purchase education programs. The course focuses on topics that help both new and existing homeowners manage their most important asset. These topics include home maintenance and repair, financial management and budgeting skills, insurance, methods for getting homeowners more involved in their community, early intervention programs to prevent delinquencies and default, and the pros and cons of refinancing. Learn how to develop sustainable, effective programs and recruit homeowners in your area to your classes. Participants should be fully familiar with financial education concepts prior to taking this course. An exam is given following the course for those interested in obtaining a Certificate of Professional Recognition in post-purchase education training.
5. Housing Counseling Program Management			
Homeownership Counseling Certification for Program Managers & Executive Directors (HO360)	Advanced	5 days	This course is designed for professionals in the homeownership counseling field who are working at the management level. Through hands-on application participants will learn procedures and methodology that will better equip them to manage the day-to-day operations of a housing counseling program. In this course homeownership program managers and executive directors will learn how to: diversify funding sources; recruit, manage and retain counseling staff; perform contract reviews and programmatic assessments; and efficiently manage case files utilizing a variety of time management techniques. A strong focus on quality assurance and proficiency in operating in performance standards, HUD, National Industry Standards, fair housing, ethics, compliance, pipeline review and reporting is included.

Asset Management

Course Name	Course Level	Course Length	Course Description
AM101 Successful On-Site Property Management (IREM RES201)	Intermediate	5 days	The Accredited Residential Manager (ARM) certification is the most widely esteemed credential for residential property managers. To potential clients and employees, the ARM credential symbolizes broad-based expertise in the whole spectrum of residential property management, from day-to-day maintenance to financial planning. You will learn human resource and relationship management; legal issues and risk management strategies; professional ethics; on-site maintenance management; property financial management and marketing and leasing. You will improve your property's bottom line, increase productivity and secure a reputation as a manager who knows what it takes to achieve the owner's objectives. Examination required for certification.
AM103 The Board and Senior Management: Stewards of the Assets and the Organization	Intro	2 days	Through exercises and case studies, define the elements of good asset-management practice and explore the roles of board members, community development corporation staff and residents in asset management. Review industry standards for high performance in the context of a real estate portfolio, distinguish best-practice reporting and monitoring strategies, and explore long-term financial and capital planning. For board and senior staff who want a fundamental understanding of key asset management principles and an introduction to best practices in the affordable housing industry.
AM121 Nuts and Bolts of Asset Management	Intro	3 days	Numbers crunching and problem solving are the daily concerns of every asset manager and those assigned the asset management function. Using your own data, evaluate the quality of the information you receive on projects, design an analytic framework complete with spreadsheets and other useful tools that can help to identify long-range performance trends, establish benchmarks of high performance, and provide a truly useful reporting structure for your organization. For managers who need to know how to accurately diagnose performance problems and practice problem solving. Sponsored by the LISC Organizational Development Initiative.
AM130 Uniform Physical Condition Standards Fundamentals	Intermediate	2	The Uniform Physical Condition Standards (UPCS) course provides participants with the knowledge and skills needed to properly inspect Public Housing Agency (PHA) Program units. This interactive and comprehensive training, which discusses specifications of the Public Housing Assessment System (PHAS) and the inspector's roles and responsibilities, enhances participants' knowledge of and abilities to meet new challenges and procedures related to using Uniform Physical Condition Standards. The objectives of UPCS course is to: •Identify the work skills necessary for inspecting public housing sites and dwelling units; •Facilitate an understanding of how proper inspection work skills can increase a housing agency's capacity to meet its mission to provide safe housing; •Increase participants' understanding of the interrelationship of PASS and PHAS; •Provide a foundation for the changes in the system as it relates to Asset Management; •Increase participants' familiarity with and understanding of UPCS procedures and inspection forms; and •Provide participants with the knowledge and skills needed to evaluate their agency's current inspection operation, including the identification of strengths, weaknesses, and growth potential, and to identify goals and solve
AM132 Project-Based Maintenance Management	Intermediate	2 days	Are you managing maintenance or is maintenance managing you? This 2-day interactive training will help you take control of the maintenance monster. From the basics of setting standards and expectations and developing preventative maintenance systems to completing a HUD required maintenance plan, this is a must-have learning experience. Information you need to run a successful maintenance operation is covered in this training, including labor repair time standards, quality control, mold, lead-based paint, and automated systems.

AM230 Property Management for Scattered Site Rental Housing	Intermediate	2 days	Managing geographically scattered and small-scale rental properties poses unique and difficult challenges to the affordable housing owner. A portfolio of small properties requires the owner to possess or obtain special property management skills. Management will not have the advantages of on-site property management staff, or the economies of scale a multiple-unit building provides. This course is designed to help the participant identify ways of mobilizing and adapting a management operation to effectively monitor the operational performance of a scattered-site real estate portfolio. Through case study analysis and discussion of best practices, participants will learn to identify and examine the different property management options available to best meet their organization's needs. Approaches to keep such housing stock healthy and energy efficient will be addressed. A special module will cover the specifics of managing REO properties.
AM242 Green and Healthy Strategies for Multifamily Properties	Intermediate	2 days	In the course of standard property management activities, operations staff can continuously (and affordably) upgrade units to be utility efficient and healthier for families. This course will enable participants to identify opportunities to introduce health/energy/water benefits into routine building maintenance and capital improvement processes. Participants will learn to evaluate project specific data to set priorities for energy, water, and resident health improvements, use integrated planning tools to prioritize improvements and implement a green and healthy property management plan that will reduce energy and water use and improve resident health conditions. The course is designed for affordable housing property managers, property owners, asset managers and maintenance supervisors as well as other staff who have input into property maintenance operations and decision-making. A special module will address techniques on training residents to incorporate green and healthy strategies. This course was developed by NeighborWorks and The National Center for Healthy Housing.
AM244 Creating and Managing a Comprehensive Energy Program for Your Residents	Intermediate	2 days	The effective management of energy usage has a direct impact on keeping rental housing affordable. This course will help residents, owners, and staff to understand and address the high costs of energy usage in multifamily housing properties. You will learn how to build and use community leadership and partnership between residents, owners and property managers to implement your energy management program. Participants will learn effective tools and strategies on how to engage tenants and involve stakeholders such as vendors, utility companies, and social service agencies. Learn a step by step campaign plan that includes background knowledge about the problem, new tools and effective strategies to educate everyone of the importance and benefits of managing and implementing comprehensive energy efficiency strategies for the physical and financial health, growth and stability of properties.
AM290 Asset Management Specialist - The Fundamentals	Intermediate	3 days	This three-day course is designed to further acquaint the affordable housing practitioner with the concepts and strategies of sound asset management. It is a major building block in the CHAM® curriculum. Its successful completion, in combination with the two-day AM291: Asset Management Specialist: Introduction to Financial Tools, is required for those pursuing the Asset Management Specialist (AMS) and CHAM® designations. This class includes a test. AM290 and AM291 replace the former five-day Nonprofit Housing Management Specialist (NHMS) course and are recommended, but not required, to be taken during the same week. The Nuts and Bolts of Asset Management, a three-day workshop on asset management fundamentals that is offered regularly at the NeighborWorks® Training Institute (NTI), is a prerequisite.
AM291 Asset Management Specialist - Introduction to Financial Tools	Intermediate	2 days	This two-day class is an introduction to real estate finance, exploring analytical concepts that are critical for the professional asset manager. The class will cover basic tools for analyzing properties' financial health, for determining their market value, and for developing multi-year financial projections. This class includes a test, successful completion of which is required for the Asset Management Specialist (AMS) and CHAM® designations. The Nuts and Bolts of Asset Management, a three-day workshop on asset management fundamentals that is offered regularly at the NeighborWorks® Training Institute (NTI), is a prerequisite for AM291. AM291, in turn, is a prerequisite for Advanced Financial Tools, which is also a requirement for the CHAM® designation.

Affordable Housing			
Course Name	Course Level	Course Length	Course Description
Ah101: An Overview of Affordable Housing	Beginner	2 Days	In this comprehensive overview of the real estate development process, learn to assess the pros and cons of real estate development and how they can affect an organization's goals. Discuss project assessment, acquisition, finance, construction, marketing, pre-leasing, leasing and management. Review the roles, risks and rewards of real estate development, using examples and on-site exercises. This course is for managers working in organizations considering real estate development. It is part of the Consortium for Housing and Asset Management curriculum for Nonprofit Housing Management Specialists (NHMS) seeking the Certified Housing Asset Manager designation.
AH102: The Basic Steps of Affordable Housing Development	Beginner	2 Days	This course leads participants through the basics steps of developing an affordable housing project from site selection and project feasibility through development team selection to budget design and funding. It will provide a secure groundwork for new project managers as well as providing Executive Directors and Board Members a base of knowledge that will allow them to adequately follow the development process.
AH115 Using the Low-Income Housing Tax Credit (LIHTC) Program	Beginner	2 Days	This introduction to low-income housing tax credits covers various IRS regulations, including 70%/30% present value credit, method of discounting, eligible basis, qualified basis, and adjusted basis. Learn about syndication, ownership structure, and negotiating equity proposals. For managers, loan officers and rehab specialists familiar with multifamily financing but not experienced with syndications and/or tax credits.
AH121: Real Estate Finance Nuts and Bolts	Beginner	1 Day	This entry-level course introduces the key components of real estate financing. Learn basic real estate financial terms and basic principles of financing real estate. Examine the concept of loan amortization and the American mortgage lending system for rental and home ownership. Learn to use spreadsheets to make basic financial calculations of loan payments; interest rates; present and future values of investments/loans; and the APR. Appropriate for persons new to real estate financing and those wanting to learn how to use spreadsheets. Recommended prerequisite to AH221: Rental Housing Development Finance and other development finance courses. A basic knowledge of Excel is necessary for this class. Computers will be provided for each student.
AH221: Rental Housing Development Finance	Beginner	2 Days	Learn project financial planning through hands-on training in the basic skills required to determine the feasibility of financing multifamily housing. Using case studies, walk through analyses of project costs, income and expenses; and debt and equity capital to determine if a project is financially feasible. Learn to perform static and dynamic real estate finance analyses. Appropriate for technical staff or managers contemplating multifamily development. Financing experience is not necessary. Participants should have a working knowledge of Excel. Computers will be provided for each student. AH121 is strongly recommended as a prerequisite for this class.
AH211: Maintaining Compliance in LIHTC Projects	Intermediate	1 Day	This class is designed for owners and property and asset managers responsible for compliance requirements in the management of low-income housing tax credit projects. Focus is on gaining a basic understanding of the financial structure of tax credit projects, minimum set-asides, applicable fractions, eligible basis, resident eligibility issues and rent setting. Recommended as an introduction to the management of tax credit properties for property managers and those who monitor their work, or as a review for experienced managers of tax credit properties.

Community Economic Development			
Course Name	Course Level	Course Length	Course Description
ED101 Community Economic Development Principles, Practices and Strategies	Beginner	2 days	Look at the theoretical base and practical applications of community economic development and learn to define it. Understand the goals, guiding principles, and measures of success; examine costs versus benefits of projects; and understand the multiplier effect, capital leakage, and the difference between basic and non-basic industries. Find out what is involved in making distinctions among strategies aimed at affecting the supply versus demand for labor, and how to make informed choices about the use of tools such as business incubators, loan funds, targeted real estate projects, and job training programs. Includes case studies, lectures, and a site visit to a local economic development project. First required course to obtain a professional certificate in Community Economic Development.
ED120 Commercial Real Estate Development	Beginner	2 days	This course provides a comprehensive look at commercial real estate development, including supermarket and shopping center development and recent efforts to improve access to healthy food in low-wealth communities. We will examine the factors that inhibit retail development in underserved communities and explore the roles that CDCs and public entities can play in encouraging private sector development as well as under taking development themselves. Participants will review the role that real estate development plays in community economic development and become familiar with a variety of project types, the real estate development process and the key players on the development team. We will explore the fundamentals of market analysis, the factors affecting demand for retail and office space and the types of leases used in commercial development. Participants will learn the basics of how to evaluate the feasibility of a project and also learn how the value of commercial property is determined. We will evaluate real estate projects from the perspective of private- and public-sector lenders, estimate the amount of debt a project will support, and explore ways to close financing gaps. Several project case studies will be used throughout the course, and you will perform
ED171 Asset Development Toolkit	Beginner	2 days	Building assets helps individuals, families, and communities stabilize and expand their economic horizons. America has a longstanding history of promoting asset strategies, as reflected in existing policies to promote home and business ownership, investment, and saving. New opportunities for people to save and become asset owners will likely increase the number of individuals and families able to build assets and improve the economic security of all Americans. Asset development is a relatively new field in antipoverty and community development work that focuses on an array of strategies with promising results in creating these new opportunities for ownership and economic stability in America's communities. Learn what the spectrum of asset development strategies are, as well as the underlying theories and practical techniques for implementation. Interactive course activities will also provide tools to assess which strategies are the best fit for your community and context, how to create partnerships and secure resources for these asset development tools as well as how to develop data collection and analysis systems to measure results.
ED201 Best Practices in Community Economic Development	Intermediate	2 days	This intermediate level course integrates theoretical premises and practical techniques of small business development, commercial development, commercial district revitalization, and data-driven analysis. It aims to give you a broad understanding and flexible tools that you can apply to your unique situation to achieve the highest impact with your finite resources. You will first examine methods of strategic analysis and their tactical implications that span differing modes of community economic development. You will then apply these best practices to rural and urban case studies. For each case, you will learn of a challenge that was faced by a community development organization, be given the information then available to its decision makers, and be asked to craft solutions. You will subsequently learn the actual decision makers' choices, and their outcomes.

ED225 Commercial Real Estate Development Finance	Intermediate	2 days	<p>This course is designed for nonprofit organizations and public entities interested in getting involved with commercial real estate development. We will focus primarily on how to evaluate the financial feasibility of projects. Whether you are a developer, lender funder or advocate trying to encourage development in your community, understanding how to assess financial feasibility of potential projects will help you in your role. Students will review development budgets, create income/expense pro formas and calculate debt capacity, breakeven point and return on investment. Participants will learn how commercial properties are appraised and how to use capitalization rate to estimate value. We will assess projects using underwriting ratios and explore financing tools and sources to close financing gaps. We will look at how investment from a variety of sources can be combined to lower the WACC (weighted average cost of capital) in order to make projects feasible. We will also evaluate a project from the perspective of the equity investor and explore the financial impact of deductions, depreciation, tax credits and net proceeds from a sale. Project case studies will be used throughout</p>
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Community and Neighborhood Revitalization			
Course Name	Course Level	Course Length	Course Description
NR117 Environmental Sustainability in Neighborhood Revitalization	Beginner	2 Days	Sustainable communities are not isolated Edens but integrated regions that meet housing, employment, transportation and other needs in ways that limit negative environmental impacts while strengthening the regional economy and building social equity. Urban, suburban and rural communities can all implement environmentally sustainable strategies to advance their revitalization and growth objectives. Through case studies and practical exercises, you will learn tools to advance sustainable development at the regional and neighborhood level, and measure your progress towards achieving sustainability goals. You will also learn about the most recent policy developments, like the HUD-DOT-EPA Partnership for Sustainable Communities, and new models guiding sustainable development work, such as the ICLEI Star Community Index.
NR118 Working with Tenants and Small Landlords to Revitalize the Neighborhood	Beginner	2 Days	With a national homeownership rate of nearly 65%, in the average neighborhood at least 1 in 3 residences are occupied by a renter. In fact, market and other forces can cause rental housing investment to be concentrated in certain neighborhoods more than others, sometimes creating significant market and social stresses. To successfully sustain or create a healthy neighborhood, revitalization strategies must pay close attention to rental housing. This course explores a variety of complimentary strategies to ensure a strong rental market and a well-kept rental housing stock that makes a positive contribution to neighborhood livability and aesthetic standards. Join us in exploring how to work with landlords, especially small investors, to build their capacity to successfully manage their property for a solid return on investment, to plan for and finance physical improvements, and to become management partners with their tenants. The course also examines strategies that help tenants become engaged stakeholders in the neighborhood by empowering them to partner with landlords, neighborhood organizations and public agencies, and, when necessary, to utilize enforcement mechanisms to ensure a healthy and safe housing and community environment.
NR231 Stabilizing Neighborhoods in a Post-Foreclosure Environment	Intermediate	2 Days	With fundamental shifts in mortgage markets and the evolution of the foreclosure epidemic, fallout for neighborhoods ranges from increased vacancies to diminished property values, challenges to property maintenance, and the need to rethink homeownership options for low- to moderate-income buyers. This course includes timely information on five distinct types of foreclosed homeowners, each of which has different implications for restoring neighborhoods of choice. The course equips participants to access and better understand local data on housing markets and other indicators of neighborhood distress due to foreclosures. You will also learn strategies for foreclosure mitigation and neighborhood stabilization. This course enables participants to begin designing customized interventions best suited to their own neighborhood housing markets.
NR369 Lending and Rehab Strategies for Maximum Neighborhood Impact	Advanced	1 Day	This one-day course focuses on how residential lending and rehab services can be effective strategy components in a neighborhood revitalization effort. Designed for practitioners, funders, lenders, and policy makers who want to better align lending and rehab with neighborhood revitalization outcomes, the course looks at both purchase and home improvement lending, and draws on the experience of participants and work in the field to show how loan products can be structured to support revitalization activities and strengthen local housing markets. Participants will also learn about setting standards for maintenance and home improvement that result in images of pride and stability in the neighborhood. The course will address how these standards can be reinforced with customers and how obstacles to standard-setting can be overcome.

Community Engagement

Course Name	Course Level	Course Length	Course Description
CB122 Mobilizing Youth for Community Building.	Beginner	1 Day	Over 60 million people in the United States are between the ages of 15 and 29. How many of these young people are being recruited to make a difference in their neighborhoods? Community organizations want to involve young people, yet often don't know how to reach them, or have no plan in place to involve them after they are contacted. Look at effective strategies to recruit young people and provide positive role modeling and direction to keep them involved and active
CB270 Training Techniques: Designing and Facilitating Successful Training	Intermediate	2 Days	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.
CB273 Community Leadership Development: Lessons from Successful Training Programs	Intermediate	1 Day	This course draws lessons from successful Resident Leadership Training programs from across the nation—from San Francisco's Chinatown, through Salt Lake City and Nebraska, to New Haven, Connecticut. Learn from different models of Resident Leadership Training: how they are organized, who participates, what do they cost, how much staff-time they take, and what makes them successful. The course will prepare you to assess your options before starting a new Resident Leadership Training program, and to enhance or expand an existing program. Review the basic questions you must answer before launching a new program or a program expansion. Learn to be intentional in targeting, reaching out to and selecting participants. Understand how to maximize resources, and work with a limited budget.
CB275 Training Community Leaders: A Complete Curriculum	Intermediate	2 Days	If you, your organization and/or your community is thinking about how to train volunteer resident leaders, this is the course for you! The course is built on the resident leadership curriculum developed by NeighborWorks America. This curriculum covers the core skills needed by resident leaders to lead change in our communities, it includes all of the facilitator guides, handouts and support materials required to run a full training program for your resident leaders. If you decide to take this course, we strongly encourage you to prepare for this course by taking CB270 Training Techniques: Skills to Teach Others What You Know.

Construction and Production Management			
Course Name	Course Level	Course Length	Course Description
CP 101 - Affordable Housing Design and Construction Basics	Beginner	2 days	<p>This is the course for entry to and information on the world of rehab. Here you can learn the basics of good affordable housing design practices, construction basics such as terminology, building parts, basic construction and design techniques, universal design, and best practices. The course will arm the new rehab specialist, the senior manager or the homeowner with the information necessary to begin development of your understanding of the wonderful world of rehab.</p> <p>Prioritize for themselves and their organizations the competing interests of initial affordability, marketability, historic preservation, carbon footprint, operating efficiency, life cycle, adaptability and visitability of buildings, health and safety impacts, and embodied energy in their projects, in lecture and group discussions and exercises.</p> <p>Activities: Identify basic construction drawings, specifications, and practice the concepts of site design, layout, and redesign principles, in lecture and group exercises.</p> <p>Identify common foundation, wall, floor, and roof systems, weigh their pros and cons, and think through energy upgrades for each type of system, in lecture and group exercises.</p> <p>Incorporate system thinking into assembling building components such as structure, insulation, ventilation, and heating/cooling plants, so that their projects will be more cost- and energy-efficient, as well as code-compliant, in lecture and group exercises.</p>
CP111 - The Science of Building Performance in Housing Rehabilitation	Beginner	2 days	<p>This is a comprehensive whole-house approach using Building Science to identify and resolve the range of problems that are found in our housing rehabilitation projects. Building science is the collection of scientific knowledge that focuses on the analysis and control of the physical phenomena affecting buildings. In this course you will learn the basics and the practical purpose of building science as it applies to predicting and optimizing building performance for long-term building and economic benefit.</p> <p>The course also provides the information on tools and performance measures such as units related to measuring building performance, the hydro-thermal climate regions of the country, the ASHRAE 62.2 standards, and energy audit testing to evaluate and verify building</p>
CP 189 - Housing Developer Pro	Beginner	2 days	<p>The entire course on Housing Developer Pro® (HDP) focuses on housing rehabilitation and project management for single-family and multifamily properties. 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 also includes content for performing field inspections.</p> <p>What Does HDP Automate?</p> <ul style="list-style-type: none"> • The Inspection Process • The Assembly of Specifications for a Scope of Work & Bid Documents • A Cost Estimate • The Management of Multiple Work Addresses/Cases • Bidding and Contracting • Construction Management and Progress Payments
CP227 Single Family Development: Creating Your Construction Schedule with MS Project	Intermediate	2 days	<p>CP227 Single Family Development: Creating Your Construction Schedule with MS Project</p> <p>This two-day course is designed to assist the single family housing developer coordinate and manage numerous construction projects at the same time and is set up as a "hands-on lab" to learn and test the MS Project software tool used widely in the industry. Focusing on skills that will increase project management effectiveness and efficiency, the class will explore multi-project management, use of templates, sub-projects, linked resources, consolidated projects and managing projects in a multi-user environment. The skills developed with MS Project are applicable to single family, multifamily and commercial construction and rehab. This class is designed for any construction manager actively engaged in the acquisition, rehab or the development and construction of single family homes. This 'hands-on computer lab' will familiarize participants with the basic and essential features of MS Project software for the successful management of multiple projects in a single-family acquisition rehab, homeowner rehab or new construction program.</p>

CP 241 Residential Green Building	Intermediate	2 days	<p>Green is a hot buzzword in the building industry today. With energy prices, global warming and air quality issues on the rise, organizations, policy makers and governments are looking to the rapidly growing housing industry for solutions. Residential Green Building provides the foundation for high performance, single-family, affordable housing construction that integrates green technologies creating energy and water efficient, environmentally sensitive, healthy and durable homes. The course covers the basics of building science and walks through several of the industry standards and certification programs for green and sustainable building. Included is the introduction to and application of the Green Communities Criteria tool developed by Enterprise Community Partners to projects in order to achieve affordable green homes.</p> <p>Case studies, visual aids, tools of the trade and hands-on product samples will be used to illustrate green building and high performance construction techniques. After successful completion of the course, participants will be able to apply green building principles to new construction and renovation projects.</p>

Management and Leadership			
Course Name	Course Level	Course Length	Course Description
ML101 Critical Thinking Skills	Beginner	2 days	In today's changing environment, the ability to think critically is a core leadership skill that can help raise the bar for an organization's competitive advantage. Critical thinking requires the ability to question assumptions and examine alternative ways of thinking and acting. In this course, you will explore ways of asking and answering important questions at appropriate times, identify the benefits of critical thinking and develop strategies for applying it as a team-building tool and organizational-improvement technique.
ML102 Effective Office Management	Beginner	2 days	This course will cover foundations skills for effective office management, methods and processes covered will include: business communications, records management, office technology and interpersonal relationships with colleagues and clients. This course is a dynamic two day session that looks at Office Management from a dynamic perspective and will focus on both the theory and practice of managing office systems and communications. Recommended for administrative staff of non-profit organizations.
ML120 Strategic Thinking and Planning	Beginner	2 days	Learn how and why strategic thinking and effective planning — now more than ever — are keys to your organizational survival and success. Look at approaches to thinking and acting strategically in a rapidly changing operating environment. Discuss what implications today's market, as well as environmental and industry changes, hold for your planning process, policy decision making and day-to-day functioning. Get a step-by-step guide to a comprehensive planning process that will be both strategic and long range.
ML130 Human Resources Management and Development	Beginner	2 days	This course provides a framework for understanding and thinking strategically about employment relations and the management and development of staff. Specific topics include recruitment, interviewing and hiring, performance evaluation, compensation and benefits, promotion, job design, staff development and training, retention and turnover, and leadership succession planning.
ML160 Competitively Positioning Your Organization for the Future	Beginner	1 day	Your nonprofit organization and programs each have a position in the marketplace whether or not that position is intentional on the part of the organization's leaders, and this position can have a profound impact on your success. In this course, you will learn new ways of thinking about "positioning" and the application of these concepts to organizational planning, management and marketing approaches. You will leave the class better prepared and more proactive in defining your organization's or program's most advantageous position. During this highly participatory one-day course, you will assess your current position and specific, practical tools to use in repositioning. You will learn about better understanding customer views, assessing the impact of big picture environmental trends and assessing internal capacity as it relates to positioning, and you will spend time crafting a powerful, succinct written statement of your program's or organization's unique position.
ML173 Grant Proposal Writing	Beginner	2 day	Grant-writing is a misnomer. Getting grants takes skill in organizational development, research, finance, strategic planning, design, time management, knowledge of area resources, writing, editing, and packaging. This hands-on course shows you how to identify appropriate private-sector grant makers, approach and cultivate a funding source, and organize and write a proposal. Note: This course is designed specifically for novice grant writers.
ML226 How to Create a Social Enterprise	Intermediate	2 days	This course will help leaders of not-for-profit organizations explore opportunities for income generation and evaluate what path, if any, is best suited for business planning efforts. By increasing and diversifying your revenue base, you can build the foundation for long-term organizational sustainability. In this exciting course, you will learn about the field of social enterprise, with examples from around the country, and discuss the risks and benefits of embarking on a social enterprise. You'll walk away from this course with a prioritized list of your opportunities, an understanding of an effective approach for conducting a feasibility assessment of your situation and a list of "next steps" to pursue.

ML240 Board Oversight and Governance	Intermediate	3 days	<p>This course is targeted to new and experienced board members. Working together with your peers in an interactive approach to learning, novices as well as seasoned board members will walk away with valuable new information and tools to perform as outstanding board members. In this course you will learn: Basic responsibilities of nonprofit boards and individual board members; How to set up structures, including committees, that work ; Tools to build and maintain relationships among board/chair/executive director and staff ; How to measure the effectiveness of the board and the organization; How to select, evaluate, support and, if necessary, replace the executive director; The board development cycle, including succession-planning for the board; Financial oversight; How to develop and conserve the organization's resources, both funds and property; How to set the organization's mission and overall strategy, while including key stakeholders; How to be an effective ambassador to the community</p>
ML250 Financial Management for Decision Makers	Intermediate		<p>This three-day interactive class will guide participants through the maze of nonprofit financial reporting and accountability and explore how to use information to make decisions and guide your organization. Discover how Sarbanes-Oxley affects your organization and methods for complying with its requirements and strengthening transparency. Collaborate with other decision-makers in determining cash needs, the benefits of program cost analysis, and the optimal financial management systems. Learn how to develop, read and interpret various financial reports that will provide you with control over your bottom line and mission outcomes. Evaluate financial statements using various analytical tools and then determine strategies to ensure a strong and stable financial position. Bring your audit and internal financial statements to class.</p>
ML252 Your Money and Your Mission: Successful Financial Management in Challenging Times	Intermediate		<p>This practical hands-on course offers nonprofit leaders techniques to successfully manage their organizations through challenging times. In this course participants will: Review the key parts of nonprofit financial statements, and how this data can be best used for making sound financial decisions; Learn how to manage cash flow and credit to position the organization for financial strength in both the short and long term; Participate in a case study on how to evaluate revenue and expenses tied to each program, to help better inform fundraising strategies and other management decisions; Discuss how to develop practical scenario plans to successfully guide the organization through volatile times; The purpose of this workshop is to help nonprofit leaders develop and use financial information to make better — and often difficult — decisions, and to better communicate their financial story to funders, board members and other stakeholders; Participants will leave this class with tools that will help them apply improved financial management and strategic practices within their organizations.</p>

ML282 How to Negotiate: The Most Important Skill You Will Ever Learn!	Intermediate		Improving our communication skills is a lifelong commitment. The ability to come to mutually acceptable agreements with other people is a skill that is applicable in our professional and personal lives. During this session you will learn a series of negotiation skills that you will be able to apply in a number of situations. As a result of this session you will be able to conduct negotiations with confidence; become a better leader and team builder; create stronger negotiating positions; adjust your negotiation style for different situations and improve relationships. We will have opportunities to apply the negotiating tools through a series of practice negotiations based on real scenarios we are facing in our work.
ML292 Managing Your Nonprofit for Results	Intermediate		Most nonprofit managers spend 80% of their time solving operational problems and less than 10% on work that significantly enhances the effectiveness of their business. This course is designed for those with a serious interest in managing both financial and human resources with a clear focus on results. Learn analytical methods you can use to evaluate your organization's current programs and products along with practical tools to examine costs, weigh results and identify opportunities. Bring a calculator. This course is designed for executive directors and managers with broad programmatic knowledge and responsibility.
ML298 Managing the Growth of Your Real Estate Development Business	Intermediate		This class is for nonprofit managers who hope to grow their real estate development business. Learn about changes in organizational structure, staffing, systems, board committees and composition, management style and financial reporting that you can make to handle growing production levels. Explore strategic alternatives such as codevelopment partnerships and non-profit development collaborations. Examine whether to take additional development team functions in-house, or to rely on outsourcing. And take a step back to link production goals to the larger vision and values guiding what your organization wants to accomplish through its real estate development business. This course will emphasize case studies and peer-to-peer exchanges to give you practical tools for managing one of the riskiest — and most rewarding — business lines that housing nonprofits operate.
ML312 Organizational Leadership Succession	Advanced	2 days	This course is designed for forward-thinking executive directors and board members willing to take the steps needed to build sustainable systems of succession for their senior management and boards. This course will focus on ways to include organizational succession planning in your organizational culture and planning. This course stresses the need to have succession planning as a core component of your organizational culture and practice.
ML 376 Raising Debt and Equity from External Sources	Advanced	1 day	The primary focus of this course is on which funding sources and mechanisms will provide sources of capital for CDFIs in the near term and why. The course will also focus on what the CDFI can expect in the context of pricing, terms and conditions.
ML375 Advanced Financial Analysis for a Sustainable Mission: Pricing, Funding and Management of Assets	Advanced	2 days	This course is designed to show CDC and CDFI CFOs and other financial-minded leaders how the financial and real estate assets they invest in can be priced, structured, allocated and funded to maximize revenue and income for the purposes of building sustainability. This course uses software to set up a financial platform for strategic planning for CDCs and CDFIs. You will walk methodically through the 21 key decisions that can make mission objectives achievable, learn which of the 21 key decisions have the biggest impact on sustainability, and discover the chief indicators and financial ratios that drive all forecasts. At the conclusion of the course, you will be able to run multiple "what-if" scenarios on the structure of the assets and liabilities for your own CDC or CDFI.
ML394 Advanced Leadership for Organization Transformation	Advanced	3 days	The ultimate leadership challenge is organization transformation. Whether you are leading an organization from good to excellent or leading through a crisis, advanced leadership skills and a mastery-level understanding of organizational change is required. This course provides participants with tools for understanding the comprehensive process of organization transformation. Topics include vision and strategy development, mission analysis, stretch goals, dynamics of organizational performance, leadership styles, high performance teamwork, and strategy implementation. Participants will take away the tools for designing all of these activities within their organizations, and a tailor-made plan to begin the overall process. This three-day course is for executive directors, board member and other organizational leaders who are committed to making a breakthrough impact on their communities by transforming their organizations.

ML374 Driving in the Rain: Risk Management for Loan Funds in an Uncertain Environment	Advanced	<p>This two-day course complements ML375 (taken before or after) and explores how your organization can ensure the financial sustainability of your loan programs, including: Loan policies and procedures to manage risk — including lending control functions, management of risk concentrations, underwriting and portfolio management, risk evaluation and setting loss reserves, documentation standards, portfolio allocation and more .</p> <p>Key financial indicators and trend-line analysis for risk assessment of loans, loan portfolios and lending organizations</p> <p>Financing vehicles for loan fund capitalization</p> <p>Financial market dynamics (participants, rating agencies, terminology, the latest trends) and what they mean for capitalizing your loan fund>Steps to take to make your loan portfolio more understandable for and attractive to investors</p> <p>Historical Industry comparisons — how does your organization rate against other CDFIs?</p> <p>What's going on in the industry — big ideas</p>

Native American Community Development			
Course Name	Course Level	Course Length	Course Description
NA130 Leveraging Resources for Housing and Other Development Projects in Native Communities	Beginner	1 day	This "how to" course is designed to assist community developers to understand and access financing for housing and other projects on tribal lands. Learn how to use existing resources to leverage new sources of financing, ensure projects are financially feasible, and navigate inconsistencies when blending public and private sources to fill financing gaps in development projects. Participants also explore how non-traditional resources, such as in-kind donations and pro bono services, can be used to increase community participation and help satisfy grant and/or lending requirements. This course is taught by practitioners with extensive experience in structuring community development deals in Native American communities.
NA132 Introduction to Housing Development in Native Communities	Beginner	2 day	In this comprehensive overview of the housing development process in Native communities, learn the process of planning, designing, and implementing a housing development strategy tailored to community needs. Examine the different housing development approaches such as rental, acquisition and rehab, and lease purchase. This course will study innovative financing methods as well as alternative housing development strategies like manufactured housing and green building. Review the roles, risks and rewards of housing development, using successful Native development models. This course is for managers and planners working in organizations responsible for Native housing development and management.
NA150 Cultivating Success for Native Organizations	Beginner	2 day	When we plant a seed, we need to cultivate it and keep an eye on the elements that will affect the seed's ability to grow and survive. Organizations have similar needs. This two-day course will look at what it takes to be a strong Native organization or tribal department. Participants will learn how to create conditions in which their organization can flourish and carry out their mission effectively. The course will cover: elements of strong organizations, strategic and operational planning, fundraising strategies, board operations, staffing, sound financial management, and maximizing the use of technology.
Rural Development			
Course Name	Course Level	Course Length	Course Description
RD210 USDA Rural Development Sec502 Direct Loans: Affordable Rural Homeownership	Intermediate	3 days	This three-day advanced course will cover USDA Rural Development's Section 502 direct loan program and provide invaluable insight as to how this homeownership financing resource can be utilized in your communities. Learn how your organization can assist potential borrowers and work in partnership with RD staff in your state to deliver successful Section 502 loan packages. Through the course, designed for those experienced in using Section 502, participants will learn the regulations and practical applications of the loan program. Participants will develop a strong understanding of 502 direct underwriting and packaging standards, which will ensure that submitted loan dockets are complete and accessible for processing. Please bring a laptop to class. This advanced course is not open for those without experience in working with this program.

NeighborWorks® America Sample of Relevant NTI/PBT Courses, Learning Materials and Tools	
Homeownership and Community Lending	
Course Name	Tools
1. General Housing Counseling	
Homeownership Counseling Certification: Principles, Practices and Techniques Part 1 (HO250)	<ul style="list-style-type: none"> • Customer Intake Form • Client Action Plan • Household Income Calculation Worksheet • Monthly Expense and Debt Worksheet
2. Homebuyer Education Programs	
Homebuyer Education Methods: Training the Trainer Certification (HO229)	<ul style="list-style-type: none"> • Marketing Worksheet • AV Checklist • Detailed Workshop Design Sheet • Workshop Materials Checklist
3. Foreclosure Prevention	
Foreclosure Intervention and Default Counseling Certification Part I (HO345rq)	<ul style="list-style-type: none"> • State Foreclosure Law Summaries • Counselor Checklist • Precounseling Triage Worksheet • Triage Decision Tree • Triage Script • Intake Submission and Action Plan • Client/Counselor Agreement • Intake Application • Demographics Worksheet • Precounseling: Intake Package Review Checklist
4. Non-Delinquency Post Purchase	
Post-Purchase Education Methods (HO247)	<ul style="list-style-type: none"> • Sample Volunteer Trainer Agreement • Designing Home Maintenance Modules • Pre-Survey for Post Purchase Class
5. Housing Counseling Program Management	
Homeownership Counseling Certification for Program Managers & Executive Directors (HO360)	<ul style="list-style-type: none"> • Dual Agency Disclosure • Sample New Position Checklist • Job Descriptions for Housing Counselors • Sample Interview Guide • Screening Test for Housing Counselor Candidates • Homeownership Department Exiting Staff Checklist • Agency Onboarding Checklist • HUD Audit File Checklist

Asset Management	
Course Name	Tools
AM101 Successful On-Site Property Management (IREM RES201)	Examples of various property management forms for the functions of management: 1.marketing and Leasing - applications; tenant screening and selection criteria; leases; 2. maintenance - maintenance schedules; inspection forms; purchasing forms; 3. financial management/budgeting - variance reports, sample budgets; HR - job descriptions etc.
AM103 The Board and Senior Management: Stewards of the Assets and the Organization	Sample board reports for proper oversight of real estate portfolio performance - cash flow analysis, operating and replacement reserve analysis, budget/variance reports, pro forma to actual analysis. Performance dashboard report.
AM121 Nuts and Bolts of Asset Management	Sample performance benchmarks; examples of spreadsheet analysis; other similar analytic tools on managing the performance of the property manager and assessing property performance.
AM130 Uniform Physical Condition Standards Fundamentals	Quick check guide on UPCS standards
AM132 Project-Based Maintenance Management	Sample maintenance forms - preventive maintenance schedule; maintenance budget; various inspection forms; sample operating systems.
AM230 Property Management for Scattered Site Rental Housing	Tools for managing scattered site rental properties - marketing/leasing plan; maintenance response systems; resident engagement techniques and satisfaction surveys. Sample property management forms.
AM242 Green and Healthy Strategies for Multifamily Properties	Energy consumption monitoring tools and techniques. Training techniques for staff and residents to incorporate green and healthy strategies into operations and daily living.
AM244 Creating and Managing a Comprehensive Energy Program for Your Residents	Infrared Camera Techniques; Moisture Meter; Radon Kit; Carbon Monoxide detectors; Green Maintenance Checklist

AM290 Asset Management Specialist - The Fundamentals	Analytical Spreadsheets on property performance;
AM291 Asset Management Specialist - Introduction to Financial Tools	Multiyear Financial Projection spreadsheets; Sensitivity Analysis; Property Reserve projection spreadsheets; property valuation tools.
Community Economic Development	
Course Name	Tools
ED101 Community Economic Development Principles, Practices and Strategies	Case Study CED Glossary of key terms Sample CED needs assessment worksheet
ED171 Asset Development Toolkit	Logic Framework Model Community Needs Assessment
ED225 Commercial Real Estate Development Finance	Practice Proforma and WACC worksheet Case study Development budget worksheet
Management and Leadership	
Course Name	Tools
ML101 Critical Thinking Skills	Working Styles Assessment Tool/Analysis of Group Think Traps and Strategies to Avoid Group Think/
ML102 Effective Office Management	Office Design Diagrams/Document Protection and Recovery Strategies/Effective Communication Strategies/Technology Audit and Assessments
ML120 Strategic Thinking and Planning	Vision Plan/Strategic Plan/Vision Methods and Techniques/Strategies on how to Think and Act as an Organizer for Non-Organizers
ML130 Human Resources Management and Development	Legal Requirements of HR Staff, How to Conduct an Interview Chart/
ML160 Competitively Positioning Your Organization for the Future	Position Strategies/Analysing the Competitor in your Market/Organizational Assessment for "Readiness"
ML173 Grant Proposal Writing	Step by Step Grant Writing Process/Elements of a Grant/Feedback on hands on grant writing exercises
ML226 How to Create a Social Enterprise	Organizational Assessment of potential generating revenue enterprises (individual for each participant) Market assessment strategy chart/Rating your market and your organizational readiness
ML240 Board Oversight and Governance	Board Development Strategies/Governance and Organizational Development Tools and Strategies/Board Assessment Tool/12 Principles of Good Governance Tool/Board Recruitment and Strategies/Board Government Strategies
ML250 Financial Management for Decision-Makers	Cash Flow Analysis/Cash Projections/Budget Analysis/Basic Accounting/Report Reading Primer

ML252 Your Money and Your Mission: Successful Financial Management in Challenging Times	Money vs. Mission Assessment/Budget Flow Chart and Analysis/Practical Assessment Tool for relative strengths/weaknesses of programs.
ML282 How to Negotiate: The Most Important Skill You Will Ever Learn!	Getting to Yes Book/Principled Negotiation Model/Identifying various forms of Negotiation
ML292 Managing Your Nonprofit for Results	Results Oriented Matrix/Benchmark Formulas/Clear understanding of results based vs output based activities.
ML298 Managing the Growth of Your Real Estate Development Business	Leveraged Financing/Asset Management Strategies/Capacity/Content Capabilities
ML312 Organizational Leadership Succession	Assessment of Individual/Organizational Assessment Plan/Creation of Individualized Transition Plan for Your Organization
ML 376 Raising Debt and Equity from External Sources	Raising Debt and Equity from External Sources
ML375 Advanced Financial Analysis for a Sustainable Mission: Pricing, Funding and Management of Assets	Financial Management and Assessment/Mission to Budget Analysis/Financial Projections Software/
ML394 Advanced Leadership for Organization Transformation	Leadership Self Assessment/Organizational Evaluation and Assessment/Stretch Goal Planning/Strategic Planning
ML374 Driving in the Rain: Risk Management for Loan Funds in an Uncertain Environment	Loan Policies and Procedures/Risk Assessing Your Organization/Managing Troubled Assets
Rural Development	
Course Name	Tools
RD210 USDA Rural Development Sec502 Direct Loans: Affordable Rural Homeownership	Three packaging scenarios Practice Exam Computer Modeling Spreadsheet Jumpdrive filled with sample forms, templates and resource bank

NeighborWorks® America Online Learning Program- Courses

Virtual Classroom Courses	
AH226vc	Creative Project Financing Strategies
HO105vc	Compliance with State and Federal Regulations
HO365vc	Advanced Topics in HECM Counseling
ML173vc	Grant Proposal Writing
CB275vc	Training Community Leaders: A Complete Curriculum
eLearning Courses	
AH103el	An Introduction to Affordable Rental Housing Development
AH1295el	Community Stabilization: An Introduction to REO Acquisition, Rehab, Disposition and Manangement
AM121el	Fundamentals of Asset Management
CP185el	Fundamentals of Green Affordable Housing, Rehab, and Management
HO102el	Mortgage Lending Fundamentals for Homeownership Professionals
HO104el	Home Equity Conversion Mortgage (HECM) Counseling Basics Overview
HO109el	Foreclosure Basics
HO130el	Understanding Credit Reports and Credit Scoring
HO209el	Delivering Effective Financial Education
HO253el	FHA-Insured Loans: An Affordable Mortgage Option
HO260el	Counseling Buyers of Real Estate Owned (REO) Properties
HO265el	Counseling Clients Seeking Rental Housing
HO290el	Being Green, Seeing Green: Counseling Clients to Maximize Energy Savings
HO322el	Using Effective Practices to Improve Your Foreclosure Counseling Programs
HO346el	Understanding and Applying Foreclosure Intervention and Loss Mitigation Tools
ML162el	Marketing Your Programs and Organization
ML240el	Board Oversight and Governance
ML273el	A Leader's Guide to Ensuring Organizational Health
NR231el	Stabilizing Neighborhoods in a Post-Foreclosure Environment

Appendix D
Additional Staff Bios: NeighborWorks®
America

Additional Capacity: NeighborWorks Staff

Name/Organization	Professional Highlights
David Fromm Training Manager Present/ 30 years experience	Mr. Fromm is the Training Manager for the property and asset management, resident services and public housing learning track at NeighborWorks, and manages the development and refinement of all related courses. David has over 30 years of experience in the field serving in various management and leadership positions and has worked extensively coordinating complex projects with multi-layered financing and different regulatory programs. His background includes creating and serving as the Director of a Residential Finance Authority to finance affordable housing, a position directing the Housing Programs of Allegheny County to stimulate the development of affordable housing as well as positions in for profit and nonprofit companies in developing, preserving and managing affordable housing. Formerly the President of Consortium of Housing and Asset Management (CHAM®), David now serves as the internal lead for the consortium, which is a collaborative designation of The Enterprise Foundation, LISC, and NeighborWorks America.
Tubal Padilla-Galiano Training Manager (1996-Present)/ BA in Community Development/ University of Massachusetts, Master of City Planning from the Massachusetts Institute of Technology.	Mr. Padilla-Galiano is a Training Manager with NeighborWorks where he directs and manages the Community Engagement, and Neighborhood Revitalization training track. He joined NeighborWorks as a Management Consultant in the Field Operations Divisions, where he assumed responsibilities for grant-making, technical assistance and partnership building. Before coming to NeighborWorks® he served as Associate Director of the Mauricio Gastón Institute at the University of Massachusetts-Boston. With over 30 years of experience in community development, Túbal has held multiple and varied professional and volunteer positions, and worked as a private consultant to housing and community development organizations with a particular focus on community organizing and participatory planning for neighborhood revitalization.
Wade Parrish Training Manager (2012- Present)/ BA- University of North Carolina at Chapel Hill/MA from East Carolina University/20 Years Experience	Mr. Parrish is the Training Manager for NeighborWorks Center for Homeownership Education and Counseling (NCHC) and plans and manages the development and refinement of homeownership training courses. Wade has over twenty years experience in training and performance improvement. He has managed performance-based training functions in various industries including retail banking, mortgage servicing, engineering and retail services. He has extensive experience as a stand-up instructor, course developer and curriculum designer and holds professional certifications from AchieveGlobal, Mager, Lominger and the American Society for Quality.
Dale Prunoske Training Manager (When- Present)/ Master of Public Administration/30 years experience	Mr. Prunoske is the Training Manager for the Construction and Production Management training track at NeighborWorks America, where he manages, plans, designs and evaluates the construction curriculum, the "green" courses offered via training institutes and the affiliated faculty instructors. Dale has over 30 years of experience in both the private and the not-for-profit housing industries. Dale has been responsible for the oversight and operation of single family housing rehabilitation programs; acquisition, rehab and resale programs; and energy conservation programs. Dale was a senior level project director and vice president for the development of multi-family and elderly housing projects. He was responsible for site acquisition, underwriting, architectural and construction contracts, grant and funding applications, and construction management for projects from \$250,000 to \$8 million. Dale has also provided "best practices" training on rehabilitation programs, community development activities and green building practices at the regional, state and national levels. He is a NYS licensed home inspector, NYS certified asbestos inspector, a NYS certified code enforcement official, a certified lead safe work practices trainer, and a BPI certified Building Analyst.
Mark Robinson Training Manager	Mr. Robinson is the Training Manager for the Management and Leadership training track at NeighborWorks where he plans, and manages the course development and

<p>(2007-Present) BA -Louis University, MA in Human Relations from the University of Oklahoma (2012) / 25 years experience</p>	<p>refinement process for all related courses. Prior to that he was the director of community building and leadership development at IMPACT Silver Spring, a community development organization that has trained over 200 community leaders in leadership, community organizing, negotiation and planning. He has more than 25 years experience in the areas of conflict resolution, community organizing, program administration, and organizational development. Mark coordinated domestic projects for Pact; an international development organization headquartered in Washington, DC, worked as outreach director for multicultural community services and was a community organizer for several community-based organizations, including the Mid-Northeast Collaborative and The New Community Family Place.</p>
<p>Rebecca Solomon Training Manager 20 years experience</p>	<p>Ms. Solomon is the Training Manager for Affordable Housing training track. She has spent over 20 years developing affordable and special needs housing in Washington State and New York City. She has successfully assisted in the development of over 35 projects using just about every source of public funds available. As Principal of Solomon Development in Seattle, WA, she was the housing consultant to the Washington State Mental Health Division and provided technical assistance to mental health and social service agencies throughout urban and rural Washington. She takes great pride in her training and technical assistance skills and ability to make complex programs understandable - empowering CDCs and service providers with encouragement and knowledge. She utilized these skills in LISC's Organization Development Initiative and as a trainer at NeighborWorks Training Institutes.</p>
<p>Andrea James Director, Training Operations (September 2002 – Present) / BS, Business Administration and MS, Administration / 19 years experience</p>	<p>Ms. James directs all meeting services, registration and payments, and customer response functions for the NeighborWorks Training Division. She has vast experience managing event and training program operations at NeighborWorks, ICF Consulting, the Children's Defense Fund, and the Greater Washington Board of Trade, among others.</p>
<p>William Caplan Manager, Marketing (July 2004 – Present) / BS, Psychology and Sociology and MS, Marketing / 24 years experience</p>	<p>Mr. Caplan manages internal and external marketing communications efforts for NeighborWorks training events, and associated educational offerings of NCHEC. These efforts raise visibility and increase participation in training events from community development professionals, municipal staff, and others working in the community development field.</p>
<p>Theresa Padovano Manager, Registration and Payments (December 2003 – Present) / 22 years</p>	<p>Ms. Padovano manages eight staff members who handle registration and payments tasks for customers, sponsors, scholarship awardees, faculty, and staff, attending any of the training events carried out annually. She brings vast experience in customer service and administration and a diverse skill set to meet the needs of our diverse network and customers. She speaks and writes Spanish fluently, and assists in outreach efforts to promote Spanish language NTI courses and provide services to our Spanish-speaking participants.</p>
<p>Stephanie Lloyd Manager, Curriculum Production (February 2008 – Present) / BS, Accounting and MA, Education / 20 years experience</p>	<p>Ms. Lloyd works closely with the Training Division's content experts and staff to combine the delivery of a quality training experience with excellent customer service for internal and external customers. She has over 20 years experience in project management, supervision, administration, financial operations, and training.</p>
<p>Belinda Reynolds Customer Response Manger/ 25 years</p>	<p>Ms. Reynolds is the Customer Response Manager in the Training Division. She has over twenty-five years of experience in the insurance and car rental service industries with a focus in customer service, management, and supervision, and insurance claims</p>

experience BS Business Administration/Marketing Salisbury University	examination, claims adjustment, marketing and sales. She has worked with complex databases to handle business processes. Her former employers include Avis Budget, State Farm and USAA. While employed at USAA, she managed a claims department comprising eleven staff responsible for handling complex liability claims for automobile and homeowners' insurance clients.
Danielle Neveaux, CMP Meeting Specialist ('05-08), Manager, Meeting Services (Jan 2008 –Present) / BS, History /12 years experience	Ms. Neveaux has worked with organizations that have a strong belief in civic duty. She oversees the logistical planning and coordination of all educational training events for 25 to approximately 2,000 participants; she works on nearly 30 events annually. She is the key contract negotiator with hotels for sites and services for training events. She and her team of six meeting planners identify properties, negotiate hotel contracts, and work with key hotel sales staff to finalize contracts for signing. She oversees on-site management, travel arrangements, housing coordination, meeting room set-ups, food and beverage coordination, audio-visual planning, computer rental, security detail, transportation procurement, and invoice reconciliation.
Steve Barbier Management Consultant (1991 to present) /MS, Social Work /25+ years experience	Steve Barbier has over 25 years experience in affordable housing and has been a NeighborWorks since 1991. Since joining NeighborWorks, Mr. Barbier has been the lead staff member in the organizational development of the Navajo Partnership for Housing, Inc., Rocky Mountain Communities, and the formation of the statewide Wyoming Housing Network, Inc. Currently, Mr. Barbier is the Homeownership Management Consultant for the Rocky Mountain District and supports both development services and lending systems for 32 NeighborWorks Organizations in a 9 state region including 16 CDFIs. Removing barriers to homeownership for Native Americans has been an area of interest for Mr. Barbier since 1996, helping to leverage capacity building scholarships at the NeighborWorks Training Institute for Native practitioners and supported one of 2 pilot sites in the One Stop Mortgage Center report to the President, (2000) (a joint project of the Dept. of Treasury and the Dept. of Housing and Urban Development). From 2005-2007, he participated in the Office of the Comptroller of the Currency led Native American Interagency Financial Access Working Group. Mr. Barbier played a critical role in the development of the report "Exercising Sovereignty and Expanding Economic Opportunity Through Tribal Land Management, A Study Addressing the Range of Options to Expedite Land Title Processing on Indian Lands."
David Dangler Director, Rural Initiative (2000 – present)/ 25 + years experience	Mr. Dangler has headed up the NeighborWorks Rural Initiative since 2000. Over 100 of the 230 organizations that comprise the NeighborWorks network serve rural communities, a growing number with close ties to Native communities. Reflecting his commitment to increasing productive partnerships in Indian Country, Mr. Dangler's direct experience ranges from attending a Seneca tribal governance hearing on land lease issues in Salamanca, NY, to attending the first graduation from Sinte Gleska Tribal College in Mission, South Dakota, to celebrating the passage of the historic Crow Nation's homeownership stabilization law to effectively open private investments on trust lands in Montana, to facilitating a board retreat with the Navajo Partnership for Housing in New Mexico. Most recently, Dangler supported a film to document a partnership to promote home ownership among members of the Ho Chunk in Wisconsin, and is working with leadership of the Umatilla in Oregon to present during the National Rural Assembly in St Paul in late June of 2011. Prior to joining NeighborWorks, Mr. Dangler served for 14 years as the founding executive director of NeighborWorks of Western Vermont. As a practitioner, Mr. Dangler opened the first rural NeighborWorks HomeOwnership Center in the country, received the first NeighborWorks charter in the nation and co-founded RNA Community Builders, a national CDFI. Mr. Dangler has served on numerous regional and national boards and is currently chair of Next Step's board, a national social enterprise whose mission is to replace pre-1976 mobile homes with Energy Star rated factory built homes, member of the National Rural Housing Coalition board and an adjunct professor at Southern New Hampshire University.

Appendix D

Bios: Sample Instructor Pool

NeighborWorks® America
Sample of Bios from Instructor Pool

Affordable Housing

Instructor Name	Title/Years of Experience	Courses Taught	Professional Highlights
Alan Arthur	Executive Director/ 30+	AH101 Overview of Affordable Housing	Since 1988, Alan Arthur has been the President/CEO of Aeon, an award-winning nonprofit developer, owner, and manager of over 1,700 quality affordable apartment homes created under Arthur's leadership.
Maureen Markham	Housing Development Specialist/25+	AH102 Basic Steps of Affordable Housing Development	Maureen Markham is a senior Housing Development Specialist for the Arlington County Department of Community Planning Housing & Development. She works with both for-profit and non-profit developers to promote the construction and preservation of affordable housing. Ms. Markham holds a Master of Public Administration from the Harvard Kennedy School of Government.
Amy Wright	Senior Housing Developer/25+	AH115 Using the Low Income Housing Tax Credit Program	Ms. Wright is the Senior Housing Developer for Cathedral Square which owns and manages over 30 projects throughout Northern Vermont.
Carla Mannings	Senior Loan Officer/ 25+	AH121 Nuts and Bolts of Real Estate Finance	Ms. Mannings is a Loan Officer for Community Housing Capital providing funding for affordable housing.
Protip Biswas	Executive Director/25+	AH221 Rental Housing Development Finance	Protip Biswas is the Executive director for the Regional Commission of Homelessness in Atlanta and is on the staff of United Way of Metropolitan Atlanta.
Birute Skurdenis	Asset Manager/25+	AH211: Maintaining Compliance in LIHTC Projects	Birute Skurdenis is an asset manager with Merritt Community Capital Corporation, a nonprofit tax credit syndicator. Besides managing a portfolio of affordable housing in Northern California, she also provides training and coaching to nonprofits on affordable housing management issues and low income housing tax credit compliance.

Asset Management

Instructor Name	Title/Years of Experience	Courses Taught	Professional Highlights
Glenn French and Larry Corrin	CPM's w/ >30 years experience	AM101 Successful On-Site Property Management (IREM RES201)	Both have run Property Management Companies
Judy Weber and Lisa Deller	Consultant >35 years experience and Director of Asset Management for NEF with > 15 years at LISC and NEF	AM103 The Board and Senior Management: Stewards of the Assets and the Organization	Teaching at NTI's for over 10 years. Judy was Director of Community Builders property management operation. Lisa worked in the Organizational Development division of LISC before joining NEF.
Jack Geary and Juana Mejia	Consultant and Director of Management w/ combined 50+years experience in property and asset management	AM121 Nuts and Bolts of Asset Management	Both have been Asset Management directors at nonprofit organizations and have been teaching for over 10 years.
Nan McKay/NAHRO	Various Approved Instructors	AM130 Uniform Physical Condition Standards Fundamentals	Both organizations do national Training for PHA's
William Brett	Director of Asset Management	AM230 Property Management for Scattered Site Rental Housing	Director of Asset Management for a large regional nonprofit; formerly ran a for profit management company.
Erica Brabon	Instructor, Stephen Winter Associates, 5 years	AM242 Green and Healthy Strategies for Multifamily Properties	Erica Brabon has a breadth of experience in the fields of sustainability and environmental health focusing on energy benchmarking and auditing in multifamily buildings.
William Brett	Director of Asset Management	AM244 Creating and Managing a Comprehensive Energy Program for Your Residents	Director of Asset Management for a large regional nonprofit; formerly ran a for profit management company.
Judy Weber, Laurie Gould, Vanessa Cooper, Jack Geary	Consultants; Vanessa is Director of a west coast Housing Authority	AM290 Asset Management Specialist - The Fundamentals	All four faculty that teach this course have at least 15 years of experience in asset management operations.
Laurie Gould and Eric Richelson	Consultants; Combined 45+ years of experience in asset management	AM291 Asset Management Specialist - Introduction to Financial Tools	Both consultants are well schooled in the financial aspects of the real estate industry.

Community and Neighborhood Revitalization			
Instructor Name	Title/Years of Experience	Courses Taught	Professional Highlights
Eric Hangen	Principal/15+	NR117 Environmental Sustainability in Neighborhood Revitalization	Eric Hangen, AICP, is the president of I Squared Community Development Consulting Inc., which provides business and strategic planning, neighborhood revitalization planning, and housing finance and real estate development consulting services to clients nationwide. As a management consultant with NeighborWorks America, Hangen helped nonprofit corporations across the country develop neighborhood revitalization, strategic, and business plans. Hangen worked as the senior planning advisor for the city of Caguas, Puerto Rico, a planner for the Puerto Rico Public Housing Administration, and as a project manager in neighborhood economic development for the New York City Department of Business Services. He has a master's in public policy from Harvard University and a bachelor's in environmental studies from Brown University.
John Lehner	President/30+ Years	NR118 Working with Tenants and Small Landlords to Revitalize the Neighborhood	John Lehner is president of the NFR Corporation, a multifaceted organization that provides training, group facilitation, and consulting services to not-for-profit and for-profit corporations. Mr. Lehner is a licensed real estate broker and licensed mortgage broker in Indiana, with 30 years of experience in; community and neighborhood planning and redevelopment, housing and commercial development, lending and finance, collaborations and joint ventures, and organizational design and management.
Marcia Nedland	Principal/25+ Years	NR231 Stabilizing Neighborhoods in a Post-Foreclosure Environment	Ms. Nedland specializes in marketing strategies for places in the process of revitalization, and business models that position places and organizations to succeed. She has created marketing plans for many neighborhoods, programs, and organizations, and teaches marketing and neighborhood strategy at NeighborWorks® Training Institutes and other venues.
Mike Schuster	Principal/30+ years	NR369 Lending and Rehab Strategies for Maximum Neighborhood Impact	Michael Schubert is the principal of Community Development Strategies, a consulting firm focused on neighborhood revitalization. His expertise is in neighborhood revitalization, strategy development, organizing and marketing, and neighborhood change strategies. Prior to consulting, Schubert was commissioner of housing for the City of Chicago. He holds a BA in sociology from Loyola University of Chicago and a master's in urban and regional planning from the University of Illinois at Urbana-Champaign.
Community Economic Development			
Instructor Name	Title/Years of Experience	Courses Taught	Professional Highlights
Peg Barringer	Consultant/30 years experience	ED165 Achieving Economic Development with CDBG Funding ED110 Analytical Tools and Methods Used in Community Economic Development ED150 Commercial District Revitalization ED120 Commercial Real Estate Development ED225 Commercial Real Estate Development Finance ED101 Community Economic Development Principles, Practices and Strategies ED160 Financing Community Economic Development RD130 Rural Community Economic Development	Peg Barringer is a partner at FinePoint Associates where she oversees economic development work. Over the last 28 years, Ms. Barringer has conducted economic and financial analysis, market research, training and other services for government agencies, financial institutions, real estate developers and non-profit corporations in more than 100 communities. She has consulted on a wide range of project types including commercial real estate development; downtown and business district revitalization; microenterprise and small business development; creative economy initiatives and a large array of customized research and analysis projects. For the last 16 years, she has also taught in the Graduate Program of Urban Policy and Planning at Tufts University.
Mary Nelson	Consultant/ 40 years experience	ED201 Best Practices in Community Economic Development ED180 Community Economic Development: A Mobile Workshop ED125 Mixed-Use Development ED127 Transit Oriented Development	Mary Nelson is president emerita of Bethel New Life, where she served for 26 years. Bethel pioneered in creative community-based efforts to build healthier, sustainable and equitable communities on Chicago's west side. Some of the most notable projects include the adaptive re-use of a closed down inner city hospital, and a smart, green, mixed-use commercial center at a transit stop. She serves on the Boards of Sojourners, Christian Community Development Association, Good City and is past Board president of Woodstock Institute. Mary has her PhD from Union Graduate School and six honorary PhDs, and is now doing consulting, writing and teaching in faith based and or-community development. She is on the faculty of ABCD Institute (Northwestern University), CCDA Institute, is coordinator of Loyola University's Master of Arts in Social Justice and Community Development Degree and serves on the Seminary Consortium for Urban Pastoral Education (SCUPE). She is the author of the handbook Empowerment published by CCDA (2010), and has authored chapters in a number of books on community development.

Community Engagement			
Instructor Name	Title/Years of Experience	Courses Taught	Professional Highlights
Khepe-Ra Maat-Het-Heru	Partner/ 20 + years	CB122 Mobilizing Youth for Community Building.	Khepe-Ra Maat-Het-Heru has fostered this belief in the magic of transformative collective action in various ways at every level, from volunteer to board member to state commissioner to national/international council member/chair, and in the capacity of professional educator. She uses the power of word and by the age of 20 she had co-authored, "Get Up, Act Up, and Shape Up the World" (published by The Points of Light Foundation), directed community theater and started public speaking/singing nationally.
Rebecca Eschenberg	Principal/15+ years	CB270 Training Techniques: Designing and Facilitating Successful Training	Becky Eschenberg Consulting provides high quality training, curriculum development, technical assistance, organizational and leadership development and project management to the community development field. She specializes in training design and facilitation, coaching, strategic thinking and adaptive leadership development. Becky worked at NeighborWorks America, a national nonprofit agency providing training and technical assistance to community development organizations, for ten years. S
James Johnson	Director/15+ Years	CB273 Community Leadership Development: Lessons from Successful Training Programs	Director of Sun Consulting and Associates, James Johnson has been community organizer, trainer, facilitator, and consultant for more than 15 years. Johnson started his formal organizing and community building work as the project coordinator for People's Action Coalition of Dunkirk, New York. He co-founded Action for a Better Community, a grassroots organization in Denver. He also worked for the Center for Third World Organizing, where he co-founded Sacramento Communities Taking Action for Neighborhood Dignity. Formerly, a Resident Leadership Specialist with NeighborWorks America's Resident Leadership Initiatives, he continues training and providing technical assistance nationally.
Construction and Production Management			
Instructor	Title/Years of Experience	Courses Taught	Professional Highlights
Laura Capps	Consultant	CP124 Residential Green Building	Laura Capps is the Director of Residential Green Building Services for Southface Energy Institute, in Atlanta, Georgia. Laura leads several trainings for Southface including the EarthCraft House Builder, EarthCraft House Realtor, Mold and Moisture, HVAC for Builders and Home Energy Rating trainings. Laura is certified as a LEED Accredited Professional for Homes, RESNET HERS Rater and Trainer, Building Performance Institute Building Analyst and Proctor, NAHB Green Building Verifier and Green Building Professional and Universal Refrigerant Technician. Laura serves on the US Green Building Council LEED for Homes Faculty and Faculty Advisory Panel, and NeighborWorks Training Institute Faculty. Laura graduated from Appalachian State University with a degree in Sustainable Development and Appropriate Technology and has a Masters Degree from Georgia Tech in Construction.
David Harder	Consultant/ 23 years experience	CP227 Single Family Housing Development – MS Project	David Harder has been involved in affordable housing development and construction since 1990. Harder holds an active General Contractor license in Florida, is an accredited professional with the United States Green Building Council, and is also a certifying agent with the Florida Green Building Coalition. As executive director of a neighborhood-based community development corporation, Harder supervised the development of more than 225 units of for-sale and rental housing. His CDC also developed the first Creole language-based homeownership training course. This course prepared approximately 200 families a year for owning their first home. As a consultant, Harder has provided services to various for-profit and nonprofit organizations and government offices. His services primarily focus on providing development training and technical assistance in the areas of construction and project management.
Armand Magnelli	Consultant/ 25 years experience	CP111 The Science of Building Performance CP189 Housing Developer Pro	Armand Magnelli has worked in the affordable housing and neighborhood revitalization field for 25 years. His areas of concentration include training, high production program design and implementation, housing development capacity building, project management, program assessments, project feasibility, healthy housing, green housing, energy conservation, community and neighborhood planning and revitalization, strategic planning, organizational assessments, and technology integration. In addition to his 12 year tenure with Enterprise Community Partners, Armand has managed the production of a city's owner-occupied housing rehabilitation program, and administered housing development for two nonprofit housing development corporations, including six years as an executive director of a neighborhood-based CDC. Armand works directly with nonprofits and city governments, delivering technical assistance and training on a variety of community development issues, primarily housing development, organizational development, and neighborhood planning. He also developed the Housing Developer Pro and Neighborhood Survey Pro software products and the Housing Developer Support System Web site for Enterprise Community Partners. His company Livable Housing, Inc. is also one of the owners of Community Development Software LLC which now owns the Housing Developer Pro and Neighborhood Survey Pro software products.

Jack Jensen	Consultant/34 years experience	CP101 Affordable Housing Design & Construction Basics	Jack Jensen brings a diverse background and multiple talents to the NeighborWorks Training Institute. A master carpenter from the Chicago Carpenter's Union and a graduate of Cornell University's College Scholar program, he ran his own design-build construction company from 1978 to 1992. He then moved on to work as construction coordinator for Belter Housing for Tompkins County, a rural preservation company. He continued his nonprofit work with Ithaca Neighborhood Housing Services from 1994-1997. During that time, he was a private real estate development and project management consultant for more than 600 clients. In a six-year run as a real estate development and housing production specialist at NeighborWorks America, he helped develop, oversaw and underwrote \$4,000,000 annually in affordable housing projects and provided technical assistance and training to more than a hundred nonprofit organizations. Jensen's current consulting practice includes writing on construction and development topics, hands-on community real estate development, and technical assistance and training to nonprofits.
Paul Webb	Consultant/ 34 years experience	CP215: Environmental Review Basics for NSP1, NSP2, HOME, CDBG and other HUD Grantees	Paul Webb has worked in affordable housing and community development since 1978 and has provided training and technical assistance to nonprofit organizations and government agencies in 41 states. He is a former Russian linguist and has worked as a public health environmentalist and director of a public housing authority. Webb works directly with nonprofit housing groups around the country offering training and technical assistance in the finance and construction of affordable housing. He has extensive experience in affordable housing, universal design, housing rehab, neighborhood stabilization and environmental review compliance. He is a founding member of The Trainers Guild™ and the National Housing Rehab Specialist.

Homeownership and Community Lending			
Instructor Name	Title/Years of Experience	Courses Taught	Professional Highlights
Tia McCoy	Consultant/18 years experience	HO250: Homeownership Counseling Certification: Principles, Practices and Techniques Part 1	Tia A. McCoy is a highly skilled trainer and homeownership consultant with more than 18 years of experience. Her ability to inspire individuals to bring about change comes from her compassion and energy. Since 2006 Tia has served as the HomeOwnership Center manager for Resources for Residents and Communities of Georgia, (formerly Reynoldstown Revitalization Corporation). Prior to joining RRC, McCoy served at DASH for LaGrange, Housing Authority of the City of Atlanta, The Atlanta Center for Homeownership and National City Bank. McCoy's experience includes mortgage lending, retail banking, financial fitness and credit training and all aspects of homeownership counseling. McCoy holds a BS degree in Business Administration from the University of Kentucky.
Shareka Van Eaton	Consultant/ 18 years experience	HO250:Homeownership Counseling Certification: Principles, Practices and Techniques Part 1	Shareka M. Van Eaton, independent consultant since late 2009, began her career in 1995 as a mortgage loan processor. Over the next few years, she gained a wealth of mortgage related experiences ranging from originations and underwriting to post closing procedures. During her tenure with CCCS, she obtained many certifications and received the Sue Simmons Housing Counselor of the Year Award. Van Eaton also published an article titled "Knowledge Is Power" directed to the consumer about the benefits of receiving education prior to purchase of a home. In March 2007, Shareka relocated to Mobile, AL, as director of Counseling Services with DASH for the Gulf Coast. As a sub-contracted agency, she and staff focused on providing homeownership restoration counseling under Mississippi Homeowner Assistance Phase II Program for homeowners that suffered property damage as a result of Hurricane Katrina. Shareka is also a certified Solution Focused Financial Coach and a Money Smart train the trainer instructor.
JoAnn DePenning	Consultant	HO229:Homebuyer Education Methods: Training the Trainer Certification	JoAnn DePenning is a national housing consultant and educator; she has been a member of the NeighborWorks America faculty since 2004. DePenning has coordinated the activities of the Texas Foreclosure Prevention Task Force, a nationally recognized collaborative, since its inception in the summer of 2007. She currently serves as co-chair and statewide coordinator of the Task Force and divides her time between the activities of the Task Force and working on state and national foreclosure prevention and intervention strategies, promoting pre and post-purchase homebuyer education program development, financial literacy education in K-12 schools and working on homelessness prevention policy. She is often called upon to deliver public presentations on the foreclosure issue and the development of a successful collaborative in Texas. She provides certification training throughout the US on behalf of NeighborWorks America in the areas of pre- and post-purchase homebuyer education, housing counseling and foreclosure intervention. Additionally, she provides technical assistance and financial education program certification training on behalf of First Nations OWEESTA Corporation throughout Indian country.
Ethan Pope	Consultant/ 17 years experience	HO229:Homebuyer Education Methods: Training the Trainer Certification	Ethan Pope is a professional consultant to both nonprofit and private sector entities in the regions of neighborhood revitalization (on the non-profit side) and trainings with loan officers, originators and brokers (on the private sector side) around the country. He delivers both pre-licensure and continuing education trainings, based on the various client requests. He is primarily based in northern California, but teaches in all parts of the country. Pope has an undergraduate degree in organizational management and is working toward a master degree in business management. He has 17 years of experience in the homebuyer education field between time spent with Chattanooga Neighborhood Enterprise and NeighborWorks America. In addition to teaching the Homebuyer Education Methods: Training the Trainer course, he has taught Financial Fitness; Introduction to Housing Counseling; Housing Counseling: Principles, Practices and Techniques; Pre-Foreclosure Prevention for Beginners; Compliance for State and Federal Regulations; and Budget and Credit Counseling. Pope is a former member of the Mortgage Bankers Association and is a professional ASL (American Sign-Language) interpreter.

Marc Williams	Consultant	HO345rq:Foreclosure Intervention and Default Counseling Certification Part	<p>The president and founder Marc Williams has more than 20 years of experience in areas of housing, finance, real estate, time management, public speaking and personal development. He has worked for various organizations such as Precision Response Corporation wherein he served as a senior financial analyst for several years and was responsible for analyzing financial data, forecasting and budgeting information for companies such as, ATandT Wireless, US Cellular, Paradigm, American Express, Fed X, Direct TV, British Airways and Phillip Morris, Inc. While working for CitiGroup, Williams maintained financial investment accounts and monitored more than \$7 million in assets under management for more than a hundred consumers. Williams' affiliation with NeighborWorks America allows him the opportunity to offer education and training on a national level to thousands of organizations and individuals seeking personal and organizational growth. With the establishment of HomeMarc Consulting LLC, Williams continues to strive for success by educating and motivating organizations and individuals on homeownership; financial stability and time management; personal development; and his latest development H-synergy, a software tool for housing professionals and consumers that access real time housing resources.</p>
Dave Maza	Consultant	HO247:Post-Purchase Education Methods	<p>Dave Maza brings more than 20 years of hands-on residential construction experience including single family rehab, subdivision development and general contracting to the NeighborWorks America faculty. His experience in housing construction and neighborhood revitalization gives him the unique ability to navigate production timelines, vendor relationships, day-to-day job site problem solving and project negotiations and contracts.</p> <p>A licensed general contractor, Maza owns and operates a consulting firm specializing in project management and troubled properties. His clients include cities and local nonprofit organizations. Additionally, he has an active property management company.</p> <p>Maza also finds time to share his knowledge with his peers as an instructor for an esteemed real estate institution, teaching courses such as How to Build a House, Home Remodeling, and Arizona Law and the Homebuilder. Recently, Maza has become part of the team of faculty teaching Post-Purchase Education Methods, a course for nonprofit practitioners implementing post-purchase education and care programs for new first-time homebuyers.</p>
Patricia Brown	Consultant/10 years experience	HO360:Homeownership Counseling Certification for Program Managers & Executive Directors	<p>Patty Brown has over 10 years experience in the nonprofit affordable housing sector and enjoys teaching practitioners new ways to improve the quality and delivery of homeownership education and related counseling services. Her professional consulting work includes education development and delivery for first-time homebuyers; Financial Fitness instruction; project management; volunteer management and training; acquisition and daily management of rental income property. More recently Patty has been part of a team tasked with interactive learning activities development, curriculum revision and new course design and development. A recognized faculty member of NeighborWorks America, Patty teaches Train-the-Trainer, Post Purchase Education Methods, Housing Counseling Certification and customized new courses. Patty has been a real estate licensee since 1995. She's a member of the National Association of REALTORS and the Independent Rental Owners Council.</p>

Management and Leadership Instructors			
Instructor Name		Courses Taught	Professional Highlights
Isabel Lopez	Consultant/35 years	ML101 Critical Thinking Skills	Following an extensive 20-year career in the telecommunications industry, Isabel Lopez now heads Lopez Leadership Services. The Littleton, Colorado-based company brings a strong results orientation to leadership and organizational development programs for a broad range of clients including major corporations, foundations, educational institutions, government agencies, community and nonprofit organizations. Lopez has experience in marketing, strategic planning, operations, employee assessment, quality measurements, labor relations, supervision, management training and organizational development. She has also been lead facilitator for numerous national leadership institutes including National CASA and the Dorothy Johnson Center for Philanthropy.
Maurissa Stone	Consultant/15 years	ML102 Effective Office Management	Former Director of Staff Development at University of Maryland College Park, CEO of The Living Well in Baltimore MD.
Karimah Nonyamenko/Michelle Moore	Consultant 20 years	ML120 Strategic Thinking and Planning	Karimah Nonyamenko is the leader of ChangeWorks a community based consulting organization that works for the improvement in the lives of residents in communities through the enhancement of knowledge and skills in community building/community organizing and community development.
Linda Anderson	Director of Human Resources/25 years	ML130 Human Resource Management and Development	Linda Anderson has been the Director of Human Resources for Chicago Neighborhood Housing Services Since 2003. Chicago NHS is one of the largest organizations in The NeighborWorks Network.
Alyson Parham	CEO of Consulting Firm/Grant Writer	ML173 Grant Proposal Writing	Alyson Parham is the founder of Partec Consulting. She has taught grant writing, fundraising and other resource development courses for over 15 years, and has authored grant applications that have garnered several million dollars in funding. She is also the co-designer of the NeighborWorks virtual grant writing course.
Renee Barinoux	Principal/Community Wealth Ventures	ML226 How to Create a Social Enterprise	Renee brings more than ten years of experience from both the corporate and nonprofit sectors. In her most recent position as an Assistant Vice President at D.F. King, Renee worked with Fortune 500 companies on corporate governance issues prioritized by executive boards and activist shareholders. Prior to that, Renee was a Senior Account Executive with Edelman Public Relations' Corporate Social Responsibility Practice. At Edelman, Renee focused on partner engagements, issues management and thought leadership for the practice with a leading role in the development of 'Corporate Responsibility and Sustainability Communications: Who's Listening, Who's Leading, What Matters Most?'
Vernetta Walker	Attorney/Consultant	ML240 Board Governance and Oversight	Vernetta Walker, JD, is vice president of consulting and training for BoardSource. She has worked with many national and international nonprofit organizations addressing a wide range of governance issues, from how to start a nonprofit organization, to improving board engagement and performance, and restructuring complex entities. Her areas of expertise include board roles and responsibilities, board self-assessments, understanding conflicts of interest and legal compliance, exceptional practices, and transformative governance.
Karimah Nonyamenko/Michelle Moore	Consultant/ 20 years	ML120 Strategic Thinking and Planning	Karimah Nonyamenko is the leader of ChangeWorks a community based consulting organization that works for the improvement in the lives of residents in communities through the enhancement of knowledge and skills in community building/community organizing and community development.
Linda Anderson	Director of Human Resources/25 years	ML130 Human Resource Management and Development	Linda Anderson has been the Director of Human Resources for Chicago Neighborhood Housing Services Since 2003. Chicago NHS is one of the largest organizations in The NeighborWorks Network.
Alyson Parham	CEO of Consulting Firm/Grant Writer	ML173 Grant Proposal Writing	Alyson Parham is the founder of Partec Consulting. She has taught grant writing, fundraising and other resource development courses for over 15 years, and has authored grant applications that have garnered several million dollars in funding. She is also the co-designer of the NeighborWorks virtual grant writing course.
Vernetta Walker	Attorney/Consultant/12 years	ML240 Board Governance and Oversight	Vernetta Walker, JD, is vice president of consulting and training for BoardSource. She has worked with many national and international nonprofit organizations addressing a wide range of governance issues, from how to start a nonprofit organization, to improving board engagement and performance, and restructuring complex entities. Her areas of expertise include board roles and responsibilities, board self-assessments, understanding conflicts of interest and legal compliance, exceptional practices, and transformative governance.
Jessica LaBarbera	Principal/Non Profit Finance Fund/10 years	ML252 Your Money and Your Mission: Successful Financial Management in Challenging Times	Ms. LaBarbera was a Vice President at Citi Community Capital, a division of Citigroup Global Markets Inc., where she provided structured financing and relationship management to national nonprofit and Community Development Financial Institution (CDFI) clients. Additionally, Ms. LaBarbera has served as a consultant to both municipal government social service agencies and nonprofit advocacy organizations and direct service providers. Ms. LaBarbera holds an MPA in Nonprofit Management from Columbia University's School of International and Public Affairs and a BA in Sociology from the University of Virginia.
Chuck Doran	Principal/Mediation Works Inc/15 years	ML282 How to Negotiate: The Most Important Skill You Will Ever Learn!	Chuck Doran founded MWI, a nationally recognized dispute resolution service and training organization based in Boston, Massachusetts that provides individual and corporate clients with the highest level of professional service in the areas of negotiation consulting and training, mediation and arbitration services, and mediation training.

Richard Heitler	COO/Consultant /30 years	ML292 Managing Your Non-Profit for Results	Richard Heitler is the chief operating officer for the Urban Homesteading Assistance Board of New York City, an organization whose mission is to develop and sustain low-income, limited equity housing cooperatives. Prior to joining UHAB, Heitler was a senior associate at The Rensselaerville Institute, a research and consulting organization that helps grow high-performing communities and organizations. Heitler consults and trains in the areas of nonprofit management, asset and property management, organizational growth, and outcome funding. He has also been affiliated with the Local Initiatives Support Corporation (LISC) as a vice president responsible for creating LISC's organizational development.
Eric Hangen	Consultant/15 years	ML298/ML375/ML374	Eric Hangen, AICP, president of I Squared Community Development Consulting Inc., provides clients with business and strategic planning, neighborhood revitalization planning, and housing finance and real estate development consulting services. He has worked in the community development field for more than 10 years. As a management consultant with NeighborWorks® America, Hangen helped nonprofit corporations develop neighborhood revitalization, strategic, and business plans. He worked as a senior planning advisor for the city of Caguas, Puerto Rico, a planner for the Puerto Rico Public Housing Administration, and as a project manager in neighborhood economic development for the NYC Department of Business Services.
Robert Sheehan	Executive Director/Author/Trainer/Consultant	ML394 Advanced Leadership for Organizational Transformation	Robert M. Sheehan is the Academic Director of the Executive MBA program at the Robert H. Smith School of Business at the University of Maryland College Park. He was also a CEO of several non profit organizations. He is the author of Mission IMPACT: Breakthrough Strategies for Non-Profits.
Fiona O'Connor	Consultant/Trainer/Business Coach	ML160 Competitively Positioning Your Organization for the Future	Fiona O'Connor has worked for more than 20 years in nonprofit management and adult skill training. From 1997 until 2011 she managed and coordinated initiatives supporting the visibility of the NeighborWorks® network, as part of its development and communications division. Prior to joining NeighborWorks® America, O'Connor was responsible for strategic planning, resource development and external relations for Urban Edge, a large NeighborWorks® organization in Boston.
Alan Okagaki	Consultant/Trainer	ML374/ML375	Okagaki is a private consultant with expertise in community development and non-profit management. His consulting assignments involve either the planning and launch of new community economic development initiatives or the evaluation of development organizations and programs. He has done work in 26 states, in urban and rural areas, and in white, African-American, Latino, Native American, and Asian communities. Between 2003 and 2006, Mr. Okagaki was employed by ShoreBank Corporation first as vice president for Enterprise Group Initiatives and then as president of ShoreBank Neighborhood Institute.

Native American Community Development

Instructor Name	Title/Years of Experience	Courses Taught	Professional Highlights
Cielo Gibson	Consultant/32 years experience	NA130 Leveraging Resources for Housing and Other Development Projects in Native Communities; NA131: Introduction to Planning in Native Communities; NA132: Introduction to Housing Development in Native Communities; NA210: Native Homebuyer Education Methods: Training the Trainer	As a consultant to and an employee of numerous community development organizations, Ms. Gibson has recruited, hired, trained, and supervised management and support staff in locations across Indian Country. She has extensive experience in facilitation, research, training, and comprehensive planning designed to implement integrated strategies to meet community development needs. She has also directed the development and implementation of organizational policies and procedures for housing entities, minority businesses, a mortgage finance entity, and tribal councils. She is an accomplished trainer and is the recipient of the NeighborWorks America's most prestigious award for Excellence in Training.

Rural Development

Instructor Name	Title/Years of Experience	Courses Taught	Professional Highlights
Gina Chamberlin	Consultant/ 25 years experience	RD210: USDA 502 Loan Packaging	Gina Chamberlain has been working in affordable housing in Central Appalachia for over 15 years. Gina also works with the Housing Assistance Council as a Housing Specialist and with the Homeless and Housing Coalition of KY as the Technical Assistance Specialist. Gina is also a founding board member of the Madison County Home Energy Improvement Program, a new organization focusing on housing rehabilitation for energy efficiency in her home community. In all of these roles she uses her past experience primarily with the Federation of Appalachian Housing Enterprises (FAHE) in housing counseling, building code inspections, advocacy, technical assistance in HUD HOME, USDA's Rural Development Programs and various state programs within the region. Gina has been a member of the Board of Directors of the Homeless and Housing Coalition of Kentucky, Virginia Housing Coalition, the National Rural Housing Coalition Appalachian Federal Credit Union, Community Housing, Inc. and a founding board member of Community Housing Developers Association of Tennessee. Gina received a BA in Music Education from the University of Illinois.