



**Training Division**

# Faculty Handbook

**Eighth Edition**

This Handbook will give you an overview of NeighborWorks® America, the NeighborWorks® Training Institute and other training events. It will explain how the NeighborWorks® America Training Division is organized and provide you with the information and forms you need to experience smooth reproduction and distribution of training materials, optimum classroom set-up and logistical support and successful execution of administrative functions.

If you have any questions about any portion of this Handbook, please contact the Training Division's Curriculum Assistant at (202) 220-2469 or (800) 438-5547 or by e-mail at [ksmith@nw.org](mailto:ksmith@nw.org).

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NeighborWorks® is a registered service mark for the neighborhood revitalization services and educational programs offered by NeighborWorks® America, Neighborhood Housing Services of America, and a national network of public-private partnerships, including Neighborhood Housing Services, mutual housing associations, and similar community development organizations.

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# NeighborWorks® America

NeighborWorks® America is a congressionally chartered public nonprofit corporation involved in the revitalization of underserved neighborhoods and the provision of affordable housing primarily by building and strengthening a network of local neighborhood-based partnership organizations. Together with the NeighborWorks® America and Neighborhood Housing Services of America, these local partnership organizations form the NeighborWorks® network, which currently consists of more than 230 local organizations delivering revitalization services in more than 4,000 neighborhoods across the country. In addition, through all its combined programs, NeighborWorks® supports over 5,000 organizations per year.

Our vision is a powerful guide for our actions in the coming years. The following, excerpted from the strategic plan for 2007-2011, reflects our values and intentions.

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## Key Components of NeighborWorks® America Strategic Plan 2007-2011

### Mission

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

### Vision

Through NeighborWorks® and its partnerships, America is a nation of vibrant communities all are proud to call home.

### Values

In the way we conduct business at NeighborWorks® America and relate to people both internally and externally, we will seek always to embrace the following values:

- *Community:* We **incorporate the views of our various stakeholders** and audiences, building on **diversity as a strength** and working in **partnership with others** to achieve results.
- *Effectiveness:* We are **resourceful, responsible stewards** and seek to **leverage resources** to maximum impact.
- *Integrity:* We will foster an environment of **transparency** and **honesty** that is built on **respect** and **openness**.
- *Results:* We are **accountable** for achieving excellence through **measurable, impactful outcomes**.

### Strategic Goals

- Create and preserve affordable housing opportunities and build stronger communities.
- Build and sustain a network of excellence and promote innovation.
- Expand NeighborWorks® services and investments benefiting under-served populations and places.
- Develop and strengthen the non-profit housing and community development workforce.
- Increase capital investment in America's communities.
- Optimize the organizational performance of NeighborWorks® America to achieve our mission and strategic vision.

# NeighborWorks® America Training Events

## NeighborWorks® Training Institute

NeighborWorks® America continues to be regarded as offering the finest community development training in the nation. The NeighborWorks® Training Institutes (NTIs) operate like a week-long college: 100-120 courses are offered to 1,700 – 2,200 individuals by top-notch instructors at each event. These Institutes are open to all individuals and organizations interested in home ownership, affordable housing, asset management, construction and production management, community engagement, community economic development, management and leadership, community and neighborhood revitalization, rural development, and Native American community development. Most participants are practitioners from community development corporations, community based organizations or their board members, but a significant number of attendees also come from the public and private sectors. A bit less than half of the individuals trained are from network organizations, sponsored by NeighborWorks® America training grants.

A number of public, nonprofit and private-sector supporters have provided scholarships and other resources in support of the Training Institutes. These include the following:

### **Sponsors:**

Bank of America  
BB&T  
CIT Bank  
Citi Foundation  
Fannie Mae Corporation  
Freddie Mac  
Home Depot Foundation  
JP Morgan Chase  
MetLife Foundation  
National Association of Realtors  
PMI Mortgage Insurance Company  
State Farm Insurance  
U.S. Department of Housing and Urban Development  
WaMu

### **Endorses/Collaborators:**

AARP Foundation  
YouthBuild USA  
Enterprise Community Partners  
Rural Community Assistance Corporation  
National Council of La Raza  
National Foundation for Credit Counseling  
Neighborhood Housing Services of America  
Local Initiatives Support Corporation (LISC)  
Habitat for Humanity International  
National Development Council  
Housing Assistance Council

Institute of Real Estate Management  
National CAPACD  
Community Land Trust Academy  
Deliberative Democracy Consortium  
National League of Cities

## History of the Training Institutes

Eighty people attended the first NTI at the California Museum of Science and Industry in Los Angeles in March 1987. Since then, the Institute has grown in attendance to 1,700 – 2,200 participants and is offered four times each year in different cities across the country. Originally the Institute was developed solely for the staff of the 175 or so NeighborWorks® organizations, commonly known as Neighborhood Housing Services (NHS). With the Institute's congressionally mandated expansion, NeighborWorks® organizations (NWOs) are now only part of the constituency for this training.

NTIs now attract participants from a wide variety of nonprofit organizations, local and state governments, and financial institutions. Our goal remains to offer the highest quality community development training in the country. Accordingly, we adjust our course offerings, course content and teaching methods to correspond to the changing needs of this diverse group of nonprofits and other institutions. Instructors are integral to this effort in their use of training methods and materials that are most responsive to the needs of those working in community development community.

## Other Training Events

In addition to the national Training Institutes, the Training Division also offers NeighborWorks® network members various topical and regional training events:

- Community Leadership Institute (CLI): Through our CLIs, the Corporation offers training to resident leaders in the target areas of our NWOs. These institutes provide customized workshops and training to local residents and boards. The CLIs take training directly to resident leaders who work with our network organizations and provide them with skills and strategies to build civic engagement in their communities and make their neighborhoods more vibrant and healthier places to live.
- Achieving Excellence is an 18-month program for Executive Directors who intersperse three seminars at Harvard with intense support from coaches and peer groups aimed at achieving optimum results from addressing individual and organizational performance challenges.
- Consortium of Housing Asset Managers: Along with LISC and The Enterprise Foundation, NeighborWorks® America offers a certification program for affordable housing asset managers at NTIs.
- Executive Director Symposium: Once a year, the Corporation brings together the executive directors from all of the network organizations to listen to their important issues and concerns and provide applicable learning experiences (speakers, workshops, etc.). The information from this event is referred to frequently when NeighborWorks® America makes corporate strategic decisions.
- Native American Community Development Training Program: The Native American Training Curriculum is designed to provide training opportunities for Native American practitioners and others working to serve the community development needs of Indian Country. Tailored specifically for

tribal communities, the curriculum covers competencies in the areas of Homebuyer Education, Project Financing, Financial Education, and Organizational Capacity Building. The courses are offered at our national NeighborWorks® Training Institutes

- New NeighborWorks® Network Leaders Forum: This is a combination of orientation to the Corporation, short training sessions, peer-to-peer problem solving, and networking opportunities for all new executive directors. The forum is held once per year with an average of 20 participants.
- Place-Based Training (PBT): Beginning in 2003, NeighborWorks® America's Training Division began to facilitate offering NTI courses to organizations wishing to host local or "place-based" training. By accommodating place-based requests, NeighborWorks® America can expand its reach to community development practitioners and residents who cannot afford to attend events that require travel, hotel and related costs. We offer approximately 250 PBTs a year.
- NeighborWorks® Rural Initiatives – National Membership Conference: This biannual event allows executive directors, their board members, community development practitioners and experts working in rural areas to get together and problem solve, have mini training sessions and network among their peers.

## Professional Certificate Programs

A Professional Certificate Program (PCP) is a set of related courses within a distinct subject area that, together, cover the core competencies for that discipline. A participant can earn her/his Professional Certificate in that subject by completing, within three or four years of application to the Professional Certificate Program, all coursework, practical exercises, tests and the final evaluation. Professional Certificates require attendance at three or four institutes to complete the program, depending upon the Professional Certificate Program. There are currently fifteen professional certificate programs and each has a Training Manager assigned as listed below:

### Professional Certificate Program

Affordable Housing  
 Asset Management  
 Community Engagement (formerly Community Building & Organizing)  
 Community Economic Development  
 Construction and Production Management  
 Home Ownership and Community Lending (NCHEC)  
 Management and Leadership  
 Community and Neighborhood Revitalization

### Training Managers

Rebecca Solomon  
 Anthony Austin  
 Tubal Padilla  
 Lee Anne Adams  
 Dale Prunoske  
 Kathy Carlisle  
 Mark Robinson  
 Tubal Padilla

Randy Gordon is the Curriculum Development Director and he oversees the work of all Training Managers with the exception of the NCHEC Training Manager. She reports to Jayna Bower, Director, NCHEC.

A candidate for a Professional Certificate must earn Certificates of Completion for every course s/he wants credited toward the Professional Certificate. And, of course, a participant must attend 100 percent of a course to be eligible for the Certificate of Completion.

Specifics of each Professional Certificate Program are outlined on our website at [www.nw.org](http://www.nw.org).

## NeighborWorks® Center for Homeownership Education and Counseling

NeighborWorks® America launched NCHEC in August of 2004 in order to fortify national curriculum and certification standards for homeownership education and counseling. The goal is to help create cohesion, provide quality control, and build sustainable support for the homeownership education and counseling industry. In order to achieve this, training institutes have expanded the number of courses offered in the homeownership and community lending track. This expansion is complemented by place-based training which effectively takes the institute courses "on the road."

NCHEC offers certification for counseling practitioners in four areas –

- Pre-Purchase Homeownership Education
- Homeownership Counseling
- Post-Purchase Education Methods
- Foreclosure Intervention and Default Counseling

In addition to expanding training and certification of homeownership educators and counselors, NCHEC spearheaded the initiative to develop National Industry Standards for Homeownership Education and

Counseling, and is now promoting this along with members of a national Advisory Council to practitioners in the counseling industry.

NCHEC develops and offers tools and products designed for counselors and educators to utilize. Examples include consumer education materials – Realizing the American Dream and Keeping the American Dream and consumer guides on credit, mortgage finance and other topics in multiple languages; Keys to My Home ([www.keystomyhome.org](http://www.keystomyhome.org)) website; Multi-Cultural Marketing Toolkit; and CounselorMax™, a client management technology system for counselors.

NeighborWorks® America is providing financial and technical support to NeighborWorks® organizations, national and state intermediaries, and direct service providers to help them expand their homeownership education and counseling programs. The Center is helping organizations develop new counselors and educators, market their programs to minority families, produce new services and tools, and serve consumers in a more efficient and effective manner.

**NCHEC Staff** (as of July, 2010)

Laura Barriere, Reverse Mortgage Specialist  
Laura Bibbs, Training Coordinator  
Jayna Bower, Director  
Kathy Carlisle, NCHEC Curriculum Training Manager  
Verna Denchi, Grants and Contract Administrator  
Tosin Durotoye, Project Manager  
Amy Ford, Reverse Mortgage Program Assistant  
Teresa Gammon, Program Assistant  
Amy Grayson, Manager – Homeownership Programs  
Courtney Hansen, Business Applications Manager  
Brian Harvey, Place Based Training Coordinator  
Alex Novelli, Marketing Specialist  
Kevin Prophet, Homeownership Business Applications Specialist  
Jorge Santana, Standards and Certification Coordinator

**NFMC Team:**

Damali Berry, NFMC PBT Coordinator  
Christopher Johnson, NFMC Production Coordinator  
Tshombe Laughman, NFMC Project Manager

# Curriculum Design

## Overview

We develop our training curriculum with a few basic goals in mind:

- Courses must present **content that is useful in the field** to the practitioner.
- Courses must be **presented skillfully** to fully engage participants in the learning process.
- The classroom and overall environment in courses must **stimulate critical thinking**.
- Collectively the courses must **teach the core competencies** that organizations' staff and boards need to be successful. Core competencies are the specific knowledge, skills, and abilities participants need in order to achieve the overall course objective.

*What participants will be able to do by the end of the course. As much as possible use action verbs – not “learn” or “understand” – but “apply,” “build,” “calculate,” “design,” “present,” “develop”.*

To attain these goals the Training Institute relies on an experienced Training Division Curriculum Development staff **and faculty** with expertise in:

- Adult education
- Affordable Housing
- Asset Management
- Community Engagement
- Community Economic Development
- Construction and Production Management
- Home Ownership and Community Lending
- Management and Leadership
- Native American Community Development
- Community and Neighborhood Revitalization
- Rural Development

In addition, a dynamic curriculum design addresses:

- Cutting edge issues
- Input from leading practitioners in the field
- Impact the training has in the field and measuring that impact
- Classroom management policies and procedures designed to produce high quality adult education, including:
  - Course design and development support from our Training Managers
  - Classroom and materials-development support from our staff
  - Ongoing evaluation of course content, faculty course delivery, course materials and relevance of content to the work of practitioners in the community development field.

## Adult Learning Needs

Institute courses are distinguished by their high degree of relevance, opportunities for interaction, the use of practitioners as instructors, and high quality written materials. We recommend that instructors emphasize:

- **Learning by doing.** People generally get more out of training if they experience the subject matter, not just hear about it. Try to incorporate hands-on learning to the greatest extent possible through site visits, case studies, skills practice, small group activities, or other interactive methods.
- **Linking course content to participants' immediate needs and concerns.** The more the course content addresses participant problems, issues, strategy and decision-making needs, the more relevant it will be, and the greater the likelihood that participants will actually use what they learn.
- **Mix of techniques.** People learn differently; use a mix of teaching methods to facilitate visual, aural and kinesthetic learning.
- **Adapting to the group's needs.** It is essential that you review your course agenda with participants at the beginning of the course and, whenever possible, be flexible about relative emphasis of content areas and pacing to accommodate their educational needs.
- **Mutual learning among participants.** Course participants have such diverse backgrounds and wealth of experiences that, together, they can answer many of their own questions. As the instructor, it is important for you to facilitate the exchange of ideas among participants.

## Support for Faculty (Training-of-Trainers)

The goal of Institute training is to create an environment that maximizes learning opportunities. Curriculum development staff (also referred to as Training Managers) is available to assist you in developing teaching methods and adding creativity to your course design. Please feel free to call on the Training Managers for support regarding methods, materials, participant background, or anything else that will help you develop an excellent course.

Whether you are a new instructor, with moderate training experience, or seasoned NTI faculty, NeighborWorks® America's Training Division is committed to facilitating your ongoing skill-building and creative development as a teacher. We therefore offer Training-of-Trainers (TOT) workshops each year. TOTs focus on the principles of adult education, participatory methods, course design and lesson planning, as well as a variety of tools and techniques to enhance a trainer's toolkit.

# Course Delivery

Training Managers will normally be the first to contact instructors – approximately six months prior to an event. After which, a task order for the work to be performed will be issued – customarily three to four months prior to the event. In addition to the assigned training event and responsibilities, the task order will cite the deadline for submission of training materials and course logistical information, which is due **no later than eight weeks prior to the event**. Submissions include a camera ready PDF version of course materials for reproduction (applies only to new or updated materials), an initial classroom Set-up/AV/Equipment Request Form and a Site Visit Request Form, if the course includes a site visit. Timely submission of this information helps to manage costs and ensures that you have all that is needed to execute a successful learning session. *Once materials and classroom set up information is submitted, it is maintained for future use so that subsequent submissions are not needed.* Please retain a copy of all information submitted for your files or request a copy from your training coordinator if you are using existing materials and setups.

## Course Manuals

Instructors are expected to submit to their training coordinator via e-mail a curriculum manager approved new or updated electronic version of their training materials **in a single PDF file format no later than the specified due date**, for reproduction by our Curriculum Production Staff. The file should include handouts, notations of tabs and any other items that should appear in the training manual. The deadline for all submissions is cited in your task order and courtesy reminders are sent to impacted faculty if new materials, site visit information or initial classroom set-up forms are expected.

Course manuals must follow the format and specifications of NeighborWorks® America’s Course Manual Template (see **APPENDIX: “Course Manual Template”**). Every instructor will be provided an electronic version of the template for creating her/his NTI course materials. Course materials must be consistent with copyright laws.

While each course is unique and materials will vary accordingly, we expect all instructors to use all components provided in the template. Materials typically range from 30 – 100 pages in length. If you cut and paste text into the template, the margins, headers and footers will remain intact. To make documents as compatible as possible with the majority of software, we would like you to use any of the following fonts for your materials: Ariel, Universe, CG Times or New Times Roman. Most text should be written in 10-12 point fonts.

The Training Division Curriculum staff is here for you; we encourage you to seek their advice and guidance as you develop the content of your materials. Please contact your Curriculum Training Coordinator for assistance with submission of materials, site visit information or the classroom/AV set-up form.

## Materials Submission Procedures and Requirements

NeighborWorks® is positioned to effectively and efficiently provide reproduction services in advance of the Institute and all are strongly encouraged to submit materials and handouts on a timely basis for reproduction by NeighborWorks.

Once your course materials have been received, they will be reproduced, bound and shipped to the training site. They will be delivered to your classroom no later than the morning of the first day of your

session. It is essential that all large copying jobs be completed in advance as large reproductions may not be possible or may be cost prohibitive on site. It is also essential (to our budget and smooth Institute logistics) that we perform as much as possible of the copying ourselves.

**If you are unable to get your materials to us by the deadline, you will be responsible for copying your training materials onto three-hole punch paper and shipping (or delivering personally) a sufficient quantity of materials for your course at your OWN expense, and in most cases the costs are not reimbursable. You will also need to make arrangements with your Curriculum Production Specialist to ship enough empty course manual binders and tabs for your materials. You will be responsible for putting together your own binders, cover pages and course materials before the course begins. A copy of instructor provided materials and handouts must be submitted to your Training Manager or the faculty office on site at the NTI prior to course delivery.**

Some tips about course materials:

- Make sure you are using the most appropriate, up-to-date version of materials
- Please remember to check technical documents, such as government rules and forms, for proper dates and numbers.
- We would appreciate your taking time to select the right quantity as well as quality of materials. Consider whether extra articles, essays, samples of others' materials, and the like can be eliminated or burned onto CDs to save paper (trees) and copying costs.
- Provide originals! Please avoid asking us to make photocopies of copies or faxes.
- **Send in materials by the deadline indicated and in the required format.** This will give us time to produce, bind and ship the materials to the training site on schedule. Please note, manuals submitted out of compliance will be returned for correction.
- Computer software copyrights are the instructor's responsibility. With the exception of a few licenses for Microsoft Word and Excel, the Training Division does not have sufficient license to make multiple copies for use in hands-on computer training. Software companies can provide you with a temporary license to copy their software for use in training.

If you have any questions about submission procedures, contact our Training Coordinators at [curriculum@nw.org](mailto:curriculum@nw.org) or 800-438-5547.

## Classroom Set-Up, Audio-Visual Equipment and Site Visits

### Classroom Set-Up

We realize that classroom size and set-up are an important part of creating an environment conducive to learning, and we try to accommodate your preferences as fully as possible. Depending upon the size of your class and the dimensions of the room, we will try to give you your first choice of set-up. In addition, when able, we will try to provide you access to your classroom in the hotel the night before your course begins so you can verify the suitability of the set-up ahead of time.

As a standard, we would like your course capacity for all tracks other than NCHEC, to be 24, 30 and on rare occasions, up to 36 participants. NCHEC courses usually employ two instructors and therefore have larger capacities, sometimes up to 45 participants. If your class can be larger than 30 please let us know. Computer courses are usually capped at 18, which allow one participant per work station.

## Audio-Visual Equipment

Many courses benefit from special equipment or activities of one sort or another, from high-tech hardware to site visits. **To ensure that NW can provide the best training possible, it is crucial that AV requests be made in a timely manner. AV information is due by the submission deadline outlined in your task order. Once submitted, it is maintained on file for future use. Your timely request permits us to use NeighborWorks® America equipment or obtain the best rate on rented equipment. Due to logistical and budgetary constraints, we cannot honor AV requests or changes on-site at Institutes.** There may also be cases occasionally when audio visual items have been requested in advance but are too costly and cannot be approved. Please do not request audio visual equipment unless it is very important to the class success. Please consult with your training manager to identify cost effective alternatives when AV requests can not be honored.

## Site Visits

Some NTIs offer mobile workshops and other courses include site visits to enhance learning. Due to the cost implications of transportation, site visits must be pre-approved by your Training Manager during course development. Event specific site visit information is due by the submission deadline outlined in your task order.

It is very important for us to know well in advance the details of any site visits you request so we can ensure that your site visit runs smoothly and that we get the best possible prices from bus companies. With complete information (including itinerary, estimated departure and return times, key contact personnel, exact destination information and any other relative information), we can help you make your trip a positive learning experience.

## Submission Information

Site visit information, Classroom set-up and AV equipment requirements should be submitted to the portal option on the homepage of our equipment vendor located at [www.AVPG.com](http://www.AVPG.com). Use of the portal for these submissions will ensure that all relevant parties are informed of your site visit, classroom set up and AV needs. The login and password for the portal can be found on Document 6 in the Appendix. Timely submission is essential to our ability to accommodate your needs. Once submitted, classroom set-up and AV equipment requirements are saved on file to facilitate production of future course offerings. If classroom set up and AV information is not provided by the designated due date, a default of round tables set-up and a flip chart, ONLY will be provided. It is recommended to determine room set-up and AV requirements during initial course development.

If you have questions about classroom set-up, A/V or site visits, contact our Training Coordinators at [curriculum@nw.org](mailto:curriculum@nw.org) or 800-438-5547.

## Faculty Biographies, Photos and Other Information

Participants often ask us for the biography of an instructor or for the instructors' affiliation, address, telephone number and e-mail address. We include faculty bios in our Institute brochures and on our Web site for participants who need additional information in selecting their courses, or would like more information on an instructor. If your biographical information is not on file with us, or if you want to change any of the information, please send an electronic copy to your Training Manager.

We need your current contact information to ensure that we can contact you in a timely manner. We would also like to be able to provide your professional contact information to participants who would like to follow up with faculty beyond NTIs and other training events.

We feature photos of our instructors on our Web site. To submit your photo, please make sure it is saved as a **.jpg or .tif** file and conforms to the following specifications: for an actual printed size of **0.6" w x 0.8" h**, the resolution must be a minimum of **280 dpi**. If the resolution of your photo is **72 dpi**, then the outside dimension (around the head) must be at least **3" w x 4.5" h**. Eph or .gif extensions are acceptable as long as the above specifications are followed. For your convenience, we're happy to take your hard-copy photos, scan them in, and then return them to you.

If you have questions about submitting your bio, photo or other information, contact Heather Rosso, Marketing Consultant for the Training Division at [hrosso@nw.org](mailto:hrosso@nw.org) or 202-220-7048.

## Copyright Issues and Obtaining Permission to Reproduce

Please refer to the copyright language in the Course Manual Template regarding copyrights on course materials developed for NeighborWorks® America.

Instructors may not present for reproduction by NeighborWorks® America any material a) they have not created themselves; b) for which they have not secured prior express, written permission to reproduce as required by law; or c) unless properly attributed to the author (short excerpts only). If you are denied permission to copy any material and believe it should be purchased in quantity for distribution in your course, please discuss this opportunity with your Training Manager and, budget permitting, the publication may be purchased.

If you are unsure whether a work is copyrighted, assume that it is. Copyrighted work may or may not display a statement such as the following: “No part of this work may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying and recording, or by any information storage or retrieval system without the prior written permission of (the publisher or copyright holder) unless such copying is expressly permitted by federal law.”

To obtain permission to use copyrighted materials address your request to the author, composer, playwright, or publisher of the work.

## On-Site Classroom Management

### Taking Attendance

Instructors are required to take attendance daily to ensure that a course Certificate of Completion is given to each participant who has attended 100 percent of the course.

Daily rosters **must be picked up EACH morning** from your assigned Faculty Office prior to the start of your class and no later than 8:15am. Completed rosters are to be **returned** to your respective **Faculty Office no later than 10:30 am EACH day of your course.**

**Should any participants transfer into your class, or if they are not on your roster, be sure to add their names to the bottom of the attendance roster and make sure they have been to the registration desk to confirm their changes through a new transcript or a course admittance slip. If they have not, send them to the registration desk during the morning break to do this. This is key to ensuring that NTI operations run smoothly, including preparation of certificates of completion for these participants.**

### Distributing Course Certificates of Completion

- Your class’s Certificates of Completion will be available with your final roster the morning of the last day of your course in your assigned faculty office.
- Normally participants will receive a Certificate of Completion at the end of each course that they attended 100 percent of its scheduled time.
- **Please make clear to participants from the start that only those present for the full course will receive a certificate.** Late arrivals to the start of class in the morning or from breaks can impact a participant’s eligibility for a certificate. Certificates should be distributed at the completion of the lesson on the last day to ensure full time attendance by participants.

- It may happen that a participant did complete the course but no certificate for him or her is in your envelope. In this case, be sure to inform the Faculty Office immediately so that NTI staff are alerted to create a certificate on-site, if possible. Inform the participant that someone from the Training Division will deliver the Certificate of Completion at the Institute or mail it to the participant after the Institute.
- Please return all undistributed certificates to the Faculty Room and note the reason why they have been returned.
- If a participant encounters extenuating circumstances that prevent her/him from attending 100% of the course, refer participant to the Training Manager for that track of training to discuss.

## Distributing and Collecting Evaluation Forms

A general institute survey is conducted electronically following the event for all attendees of the NeighborWorks training Institute.

Course evaluation forms are utilized on-site to immediately gain feedback and to verify the effectiveness of courses offered at NeighborWorks training events. Evaluations will be provided along with a final roster and the course certificates in a large yellow envelope to be picked up from the faculty office prior to the start of your last day of class. Please make note of your instructor number as participants will need it to complete the course evaluation. Please review and hand out the course evaluation forms near the end of your course.

Completed forms are to be returned to the Faculty Office following the end of each course. Please help promote frank and thoughtful responses by reviewing instructions and giving the participants sufficient time and freedom to fill out the forms, recognizing their need for privacy while working on them. While you should not read the completed forms while participants are still in the room, we encourage you to review them once participants have left the classroom. We will send you a summary of your course evaluations a few weeks after the Institute. If you would like copies of the actual evaluations you may make copies in the Faculty Office.

## Professional Certificate Program Testing/Evaluation

Certain courses that are part of the Professional Certificate Programs, NCHEC or NeighborWorks® Home Ownership Program Certifications require testing of participants. Almost all tests are now to be taken on-line, eliminating the need to administer and grade tests manually. If testing is required for your course, your Training Manager will let you know and work closely with you on the development and administration of the evaluation instrument.

For courses that provide written tests, the grades will be sent to the participants three to four weeks after the institute. If the test for your course is offered on-line, contact the Training Division's Curriculum Assistant at (202) 220-2469 or (800) 438-5547, to receive instructions on how to verify the accuracy of and understand the process participants must follow to test on-line.

If you have questions regarding on-site classroom management, contact the Training Coordinators at curriculum@nw.org or 800-438-5547.

# Administrative Procedures for Faculty

## Production Staff

|                         |                               |
|-------------------------|-------------------------------|
| Stephanie Lloyd         | Curriculum Production Manager |
| Jerilyn “Shelley” Scott | Training Coordinator          |
| Richard Walker          | Training Coordinator          |
| Michael Petty           | Training Production Assistant |
| Larry Butler            | Training Production Assistant |

## Before the Training Institute

### The Contractual Agreement

After your request for qualifications (RFQ) application is successfully processed, you will receive a letter of agreement (LOA), which you must sign and return to NeighborWorks® America. The LOA authorizes you to work with NeighborWorks® America on projects for a three-year period. Task orders generated by the Training Division will authorize specific work, dates, times, fees, or expenses; you will need to sign and return these individual task orders for each institute or training project.

If you change your address, e-mail, title, company name, tax identification number, or other important information, please let us know before the training event dates so we may forward the information to our Finance Division and expedite the processing of your invoice.

### Fee Confirmation

Before the Institute, you should receive two copies of a task order, an honorarium letter, or an expense letter from the Training Division confirming the fee (if any) and/or expense reimbursement we have agreed to pay you for your work at this event. Your payment for services may not exceed the amount specified in this letter, so please be sure it accurately reflects our agreement. You should keep one copy of the task order and FAX or mail a copy to NeighborWorks® America to the address listed on the task order.

### Travel

- NeighborWorks® America participates in the General Services Administration’s (GSA) reduced airfare program and has designated Directravel as its official travel agent. Consultants and others traveling at the request and expense of NeighborWorks® America are eligible to use the GSA contract fares. As soon as you receive notification from us via a travel confirmation, you may book travel to NeighborWorks® America training events through Directravel.
- Please e-mail your travel requests, which should state your name and phone number, the dates of travel, your origination and destination cities, and preferred time of travel in both directions, to Jennifer Francis-Rey at [nwa@dt.com](mailto:nwa@dt.com). Please indicate in the subject line of your e-mail the event where you will be teaching. Directravel will make your reservation and arrange an electronic ticket for you. Only in rare cases will Directravel issue a paper ticket as this incurs a \$50 fee.

You may also call Directravel Monday through Friday during business hours (Eastern Time) at 866-492-9834.

- NeighborWorks® America will reimburse travel for business purposes in a personal automobile at a flat rate per mile (determined by the Internal Revenue Service) up to 200 miles round trip, plus fees for tolls and parking. Trips that exceed 200 miles will be reimbursed at the government airfare rate to the destination or the flat mileage rate, whichever is lower. Origin and destination information with the mileage must be included on the expense form. NeighborWorks® America will not reimburse the cost of rental cars unless you received authorization to rent in advance from the Training Division.

## Lodging

- NeighborWorks® America arranges all instructor lodging for major training events, providing single-room hotel accommodations usually from the evening before your first class begins until the last day you teach. If you have any special requests, please address them to our Training Coordinators.
- We will send you a confirmation of your accommodations and the event travel and logistics guide several weeks before the event to aid in travel arrangements. **Please check them carefully and let our Training Coordinators know immediately if you believe any of the information is inaccurate.**
- Because Training Institutes continue to grow in the number of course offerings, we use multiple hotels and other sites to accommodate the number of classrooms needed. Therefore, **it is very important that you check your confirmation and logistic guide for:**
  - **The site where your course is being taught**
  - **The site where your lodging has been reserved****This will provide you with an opportunity to verify their location and the proximity to each other which will your logistics during the institute.**

## During the Training Institute

### On-Site Support: Faculty Room

The Training Division staff maintains professional offices on site at the hotel with computers, copiers, and a fax machine. Additionally, a separate office is provided at each site for faculty support. Faculty members are to **check-in at the Faculty Office when you arrive on site, preferably the day before your 1<sup>st</sup> training course begins or prior to the start of your first day, no later than 7:45 a.m.**

At check in you will receive a Faculty packet which contains your name badge, class roster(s), announcements of other events (such as the Faculty Reception), and other important event specific information. The Faculty Office staff is available to address any urgent needs well before your class begins and throughout the entire day.

Feel free to use the Faculty Office to work on final course preparation. We provide computers for instructors, loaded with Microsoft Office software and internet access. Paper, markers, tape, and other supplies or materials are also available as well as limited reproduction capabilities. We always strive to make your teaching experience with NeighborWorks® America rewarding for you, your class participants, fellow instructors and NeighborWorks® America staff. If you need assistance in any way, please do not hesitate to let us know.

## Daily Schedule

The schedule at any Institute is subject to change, but usually adheres to the following pattern.

- Faculty offices are open for check in and faculty support on Sundays from 3:00 p.m. to 6:00 p.m., 7:00 a.m. to 5:00 p.m. Mondays through Thursdays and from 7:00 a.m. to 4 p.m. on Fridays.
- Classes begin each day at 8:30 a.m. To encourage participants to be on time, we typically remove the continental breakfast by 8:15 a.m.
- Breaks are scheduled each day between 9:45 and 10:30 a.m. and again between 2:15 and 3:00 p.m. You may choose to break for any 15-minute period **within those timeframes**.
- Rosters must be picked up from the Faculty office no later than 8:15 a.m. each day of the course.
- Completed rosters must be returned to the Faculty Office no later than 10:30 am each day of the course.
- Lunch is scheduled from 11:30 a.m. until 1:00 p.m. To ensure that participants have the opportunity to attend special luncheon events, it is important that you adhere to this lunchtime schedule.
- Monday through Thursday, classes end at 4:00 p.m. To accommodate participant travel needs and optimize their institute experience, **all courses that end on Friday will finish promptly at 2:30 p.m.** rather than at 4:00 p.m. **Under no circumstances are faculty members allowed to end the course prior to 2:30 p.m. on Friday's.**
- Afternoon workshops begin at 4:30 p.m. usually on Mondays and Tuesdays (we announce these topics and times on-site).

A number of activities occur at each NTI. Below is an outline of key elements of the Institute experience. If you have further questions about this section, contact your Training Manager.

## Faculty Reception

A reception for instructors is scheduled for one evening, usually Tuesday, during the training week. This gathering offers you the opportunity to meet other instructors and the Training Division staff. If you are at the Institute on the day it is scheduled, we hope you will take advantage of this time to exchange ideas, discuss fields of mutual interest, and give us recommendations and suggestions about the effectiveness of the Institute. This is also a festive time where we make special Faculty Award presentations and hand out door prizes including Suite accommodations for the next event!

## Special Luncheons

We often bring guest authors or prominent practitioners to NTIs for luncheon presentations. If you would like to attend any of these events, please contact your Training Manager for a complimentary ticket. These tickets are available subject to space limitations.

## Afternoon Workshops

On Monday and Tuesday afternoons from 4:30 to 6:00 p.m., we provide, at no additional charge, a range of workshops that supplement the regular coursework. If you are interested in leading or assisting with such a session at a future event, please consult with your Training Manager. We appreciate your willingness to teach an additional workshop at the end of the day. You are also welcome to attend any of these sessions yourself.

## After the Training Institute

### Getting Paid and Reimbursed for Expenses

- As noted earlier, NeighborWorks® America must have your signed task order before proceeding with payment.
- Submit an invoice for fees and/or expenses to NeighborWorks® America within 30 days of completion of service outlined in your signed task order. NOTE: A task order is not an invoice.
- Lateness in submission of invoices can result in reductions in payment. Please read terms of task order carefully. See attached “**Invoices**” in the **APPENDIX**.
- Itemize and report your expenses on the Non-Staff Expense Form sent to you along with your Task Order. You must also submit original receipts for Fed Ex, office supplies and/or training materials regardless of the cost.
- NeighborWorks® America guidelines are that meals and incidental expense reimbursements should be no more than **\$50.00 per day**. This guideline may be allocated in any way for meals, tips (such as bellmen, maids and doormen), valet services and other incidental expenses. We do not require receipts for meals, just that you indicate how you spend the per diem of up to \$50. There is **no reimbursement for alcoholic beverages**.
- Ground transportation and airport parking expenses also must be documented by original receipts in excess of \$75.00 for the week. Our budget dictates using the most cost-effective mode of transportation (for instance, where possible, use the airport shuttle or bus service rather than a taxi).
- Expenses for souvenirs or treats for class participants are not eligible for reimbursement.
- Our goal is to mail out or electronically transfer payments within 30 days of receipt of a completed invoice and expense report (with all required, original receipts attached.)
- Please note:
  - Any exceptions or missing pieces delay payment.
  - If the LOA is with your organization, all fees and expense reimbursements are made directly to the organization.
  - No agreements consultants make are binding without authorized Training Division personnel’s knowledge and approval.
  - Pre-approval from your NeighborWorks® America Training Manager must be obtained for resource materials being purchased.
  - Mileage rate for reimbursement is \$0.50. The distance will be calculated, using Mapquest, from the origination address you indicate on your expense report to the address of the Training Institute site.
  - If you purchase your own airline ticket, please provide the original receipt. You will only be reimbursed the government airfare rate.

# Appendix:

## Sample Documents

1. Training Division Staff Directory
2. Task Order
3. Expense Only Letter
4. Lesson Plan – Model
5. Course Manual Template
6. Classroom Set-up/AV/Equipment and Site Visit Request Portal
7. Confirmation Letter
8. Travel and Logistics Guide
9. Attendance Roster Instructions
10. Attendance Roster
11. NTI Course Evaluation Form
12. NTI Participant Satisfaction Survey
13. NTI Friday End Time
14. Invoice and Expense Submission Reminder
15. Expense Report: Non-Staff (used by Faculty)

Toll-Free Institute Information Line: (800) 438-5547  
 NCHEC fax line: (202) 376-7276

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

Local Institute Information Line: (202) 220-2454  
 NCHEC PBT Tel: (866) 785-4401

Training Fax Line: (202) 376-2168  
 NCHEC PBT Fax: (202) 376-3678

| PAUL KEALEY, DIRECTOR OF TRAINING - (202) 220-2375 |      |  |      |  |      |  |      |   |      |
|--|------|--|------|--|------|--|------|---|------|
| Marva Oxley, Administrative Specialist - 2434      |      | Vivian Jackson, Financial Manager – 2419       |      | Jill Nobles, Financial Specialist - 2344         |      |  |      |   |      |
| NCHEC  |      | Homeownership Programs                         |      | Customer Response                                |      |  |      |   |      |
| Jayna Bower<br>Director                            | 2451 | Amy Grayson<br>Manager                         | 7078 | Sam Sellers<br>Manager                           | 2428 | John McCloskey<br>Deputy Director          | 2398 | Christina Deady<br>Director                     | 2432 |
| Teresa Gammon<br>Program Assistant                 | 6315 | Brian Harvey<br>PBT Coordinator                | 2465 | Greg Smiling<br>NCHEC Cust. Response Asst.       | 2327 | Yvette Williams<br>Program Coordinator     | 2427 | Curriculum Development                          |      |
| Verna H. Denchi<br>Financial and Contracts Analyst | 2468 | Kathy Carlisle<br>Homeownership Specialist     | 2477 | Michelle Pointer<br>Customer Response Specialist | 2359 | Staff and Network Develop.                 |      | Randy Gordon<br>Director                        | 2450 |
| Certifications, Standards & Special Projects       |      | Laura Barriere<br>Reverse Mortgage Specialist  | 7058 | Sandra Scott<br>NFMCCust Response Asst.          | 2440 | Becky Eschenburg<br>Manager                | 2488 | Anthony Austin<br>Asset Management              | 6308 |
| Tosin Durotoye<br>Project Manager                  | 2414 | Laura Bibbs<br>Training Coordinator            | 2320 | Registration and Payments                        |      | Carlee Warner, Manager<br>651.552.2022     |      | Dale Prunoske<br>Construction and Production    | 7061 |
| Jorge Santana<br>Cert. & Standards Coord.          | 6331 | TRAINING OPERATIONS                            |      | Theresa Padovano<br>Manager                      | 2378 | Online Learning                            |      | Kindra Smith<br>Program Assistant               | 2469 |
| Business Applications & Tools                      |      | Andrea James<br>Director                       | 2408 | Alice Smith<br>Payments Specialist               | 2445 | Jill LaPanna<br>Manager                    | 2436 | Lee Anne Adams<br>Econ & Rural Dev., Native Dev | 2433 |
| Courtenay Hansen<br>Business Applications Manager  | 7066 | Meeting Services                               |      | Bernadette Courtney<br>Registration Specialist   | 2302 | Marketing                                  |      | Mark Robinson<br>Management & Leadership        | 2358 |
| Kelli Baxter<br>Administrative Specialist          | 2313 | Danielle Neveaux<br>Manager                    | 2384 | Crystal Pruitt<br>Payments Specialist            | 2422 | William Caplan<br>Manager                  | 2426 | Rebecca Solomon<br>Affordable Housing           | 2435 |
| Kevin Prophet<br>Business Applications Spec.       | 6306 | Barbara Jones<br>NFMCC Meet. Planning Spec.    | 6330 | Elsie Gomes<br>Registration Specialist           | 2470 | Alex Novelli<br>NCHEC Marketing Consultant | 6318 | Tubal Pacilla<br>Community Engagement           | 2474 |
| NFMCC  |      | Barb Nappy<br>NCHEC Meet. Planning Spec.       | 2460 | Erica Smith<br>Registration Specialist           | 2425 | Heather Rosso<br>Marketing Consultant      | 7048 | Curriculum Production                           |      |
| Tshombe Laughman<br>NFMCC Project Manager          | 6324 | Corina Sumarna<br>Meeting Meet. Planning Spec. | 2424 | Gina Ricker<br>Registration Specialist           | 2457 | Lucy Rosario<br>Marketing Consultant       | 2430 | Stephanie Lloyd<br>Manager                      | 2303 |
| Chris Johnson<br>NFMCC Production Coordinator      | 7043 | Darrell Watson<br>Meeting Planning Specialist  | 2441 | Princess Myers<br>NCHEC Registration Specialist  | 2442 | Workforce Development                      |      | Larry Butler<br>Training Production Assistant   | 2364 |
| Damali Berry<br>NFMCC PBT Coordinator              | 7044 | Josefa Martinez<br>Meeting Planning Specialist | 2465 | Vanessa Rodney<br>Payments Specialist            | 2421 | Debbie Wise<br>Manager                     | 7062 | Michael Petty<br>Training Production Assistant  | 2447 |
|  |      | Virginia Rosell<br>Meeting Planning Specialist | 2420 |  |      | Elizabeth O'Dell<br>Vista Leader           | 6305 | Richard Walker<br>Training Production Spec.     | 6319 |
|  |      |  |      | Eric Mejia<br>Vista Leader                       | 2326 | Shelly Scott<br>Training Production Spec   | 2403 |   |      |

Task Order  
7-T-250-2-25-T39-000-0000-00  
Reference #250-09-5555-CB

May 27, 2009

Mr. John Doe  
Consultant  
ABC Consulting  
123 Apple Street  
Washington, DC 20005

Dear John:

This Task Order is issued pursuant to the Letter of Agreement between **[Name or Organization]** and Neighborhood Reinvestment Corporation (doing business as NeighborWorks® America) dated **[Date]** and is made a part thereof. This Task Order confirms the following terms under which you agree to render your services to NeighborWorks® America.

**Please be sure to initial each of the terms below and sign at the bottom of the Task Order**

- \_\_\_\_\_ 1. Consultant shall update materials where necessary and teach **[Course # and Name]** on **[Date]** in **[Institute city]** for NeighborWorks® Training Institute. Updated electronic materials or notification of intent to use materials already on file with us are due by **[Date]**. If materials are not received by **[Date]** consultants will be responsible for reproducing a sufficient quantity for the course and for shipping their materials to the Institute at their own expense.
  
- \_\_\_\_\_ 2. Following the execution of the requirements outlined above, NeighborWorks® America shall pay you a fee not to exceed **[\$Dollar Amount]** for **[#]** days of service at the rate of **[\$Dollar Amount]** per day upon submission of an invoice. This fee includes all planning, preparation, instruction, and travel time. Consultant shall be reimbursed for travel-related expenses, in accordance with NeighborWorks® America's policies.

- \_\_\_\_\_ 3. Vanessa Rodney must receive an executed duplicate original of this Task Order **within 10 business days of receipt**. Please address all **invoice-related** questions to Vanessa at (202) 220-2421, via FAX at (202) 376-2168, or via e-mail at [vrodney@nw.org](mailto:vrodney@nw.org).
- \_\_\_\_\_ 4. Consultant is expected to submit a final invoice to NeighborWorks® America **no later than 30 days after completion of the task**. In the event that the final invoice is not submitted within 60 days, NeighborWorks® America shall deduct 5% from the amount otherwise due on the task order. For each 30-day period thereafter that the invoice is not submitted, NeighborWorks® America shall deduct an additional 5% from the amount otherwise due on the task order. The penalty shall not exceed 30%. The consultant's invoice for fees and expenses must be submitted to Vanessa Rodney along with the enclosed non-staff expense form.

Registration and Payments Unit  
Attn: Vanessa Rodney  
NeighborWorks® America  
1325 G Street NW, Suite 800  
Washington, DC 20005

**Please Note:            This Task Order is not an invoice.**

Sincerely,

Randy Gordon  
Director, Curriculum

---

I have read and I agree to the terms of the Task Order.

Authorized Signer (Please Print): \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

[Date]

**Expense Only Letter**  
**7-T-250-2-25-###-000-0000-00**  
**Reference #250-08-####**

[Instructor]  
[Organization]  
[Street Address]  
[City, State #####]

Dear [Instructor]:

This Expense Only Letter confirms that you will teach **[Course # and Name]** on **[date]** at **[event] • [date]**.

Consultant shall be reimbursed for travel-related expenses, in accordance with Neighborhood Reinvestment Corporation (now doing business as NeighborWorks® America) policies.

Enclosed is a non-staff expense form. **At the end of the event, please mail the completed expense form to:**

Attn: Vanessa Rodney  
NeighborWorks® America  
1325 G Street NW, Suite 800  
Washington, DC 20005

If you have any questions about the processing of your expense form, please feel free to contact Vanessa Rodney at (202) 220-2421. Direct all other questions pertaining to the Expense Only Letter to my attention.

Sincerely,

Randy Gordon  
Director, Curriculum

Enclosure

# Glossary of Terms for NTI & CLI Course Design and Lesson Plans

## **Course Objective:**

A description of the performance that is a result of a given plan of instruction. A statement about what the participant will know and be able to do by the end of the course. . .

*“By the end of the course, participants will be able to . . . “*

## **Core Competencies:**

The specific knowledge, skills, and abilities (KSAs) participants need in order to achieve the overall course objective.

*What participants will be able to do. As much as possible use action verbs – not “learn” or “understand” – but “apply,” “build,” “calculate,” “design,” “present,” “develop”.*

## **Learning Objectives** (commonly called Instructional Objectives):

The performance that is expected from participants to demonstrate their achievement of competencies. Learning objectives are how we know the participant has obtained the intended knowledge, ability or skill.

*The performance occurs DURING the class and should directly relate to one or more competencies.*

## **Lesson Plan:**

A step-by-step guide for achieving desired learning objectives.

*Needed for all NTI and CLI courses. Includes activities, steps and resources needed to teach the course.*

# MODEL LESSON PLAN

**COURSE NAME:** Managing a Successful Section 8 Homeownership Program

**COURSE INSTRUCTOR(S):** Cole Sanchez

**TIME OF COURSE:** (number of days or hours): 2-day course

**COURSE DESCRIPTION:** (if this is not a new course, take language from website):

Managing a successful Section 8 voucher homeownership program requires a creative and entrepreneurial approach. The course is designed for public housing authorities, nonprofit organizations, housing finance agencies or anyone who has already developed a Section 8 voucher homeownership program and is interested in learning more about effective and proven implementation and management strategies.

**COURSE OBJECTIVE:** *(use same language as that used in Course Manuals distributed to participants)*

By the end of this course, participants will be able to manage the principal components of a Section 8 Homeownership program.

**CORE COMPETENCIES and LEARNING OBJECTIVES:** *(use same core competencies and learning objectives used in Course Manuals distributed to participants)*

Competency 1: Apply financing options that complement Voucher Homeownership Programs.

Learning Objective 1a: By the end of session block one, participant will conduct a mock interview with a prospective client and correctly fill out information needed to calculate financing ratios.

Learning Objective 1b: By the end of session block two, participant will correctly calculate two of the three innovative financing structures using formulas presented in PHA/NWO partnerships.

Learning Objective 1c: By the end of session block two, participant will use case study example and choose the financing structure that will best serve the conditions of the client and articulate a valid reason for the choice (validity will be agreed upon by instructor and two peers).

Competency 2: Implement pre- and post-purchase counseling and education.

Learning objective 2a: By the end of session day one, participant will identify key actions and questions appropriate for the first pre-purchase counseling session (in accordance with those outlined in the course manual).

Learning Objective 2b: By the end of the morning of day two, participant will demonstrate recommended procedures (as detailed in course sessions) and appropriate interpersonal relations in conducting a post-purchase counseling session.

Learning Objective 2c: By the end of day two, participant will illustrate steps involved in leading a prospective Section 8 client through pre- and post-purchase counseling.

\*Competency 3: Build successful partnerships with public housing authority (PHA) and nonprofit partners.

\*Competency 4: Apply latest government regulations.

\* Learning Objectives not included for competency 3 & 4 in this model.

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## **ACTIVITY SEQUENCE FOR AGENDA**

*Key points for outlining activities in lesson planning:*

- *More than one activity can be developed to address the same learning objective. With creative course design, one activity can address more than one learning objective.*
- *It is recommended to have at least one learning check for each morning or afternoon block; it is better to have one for each 90 minute block. Learning checks can be fun – the main point is to permit the participants a tangible (see, hear, touch) way to know they are on track.*
- *One learning check can be used to assess more than one activity or more than one learning objective.*
- *The activity below is outlined as a two-hour time block. It is always helpful to indicate approximate time in minutes for each step.*

**Activity 1:** *title of activity; state approximate time*

Financing Structures for Section 8 Homeownership (2 hours total)

Learning Objective 1a: By the end of session block one, participant will conduct a mock interview with a prospective client and correctly fill out information needed to calculate financing figures.

Step 1: Ask participants to generate a list of key information needed from prospective clients in order to calculate financing possibilities.

Step 2: Distribute worksheet forms. Note the similarities of information participants have generated with that required by the forms.

Step 3: Present PowerPoint presentation outlining key information that must be obtained in interviews and that is needed to calculate financing possibilities.

Step 4: Form groups of three, and distribute an information sheet for a prospective client and an observation guide.

Step 5: Have participants conduct mock interviews to collect needed information and record it on worksheet.

### Step 6: (Learning Check)

At conclusion of interview, observer asks questions from observation guide and shows correctly filled out form with needed key information. Instructor checks to see percentage that had correct information and decides on need to follow up, or proceeds with next exercise

**RESOURCES NEEDED:** Financing Blank Worksheet; Observers Guide; PowerPoint equipment; flipchart and markers

BREAK

**Activity 2:** *title activity; state approximate time; list steps; insert appropriate learning objective; insert learning check; list resources needed for activity*

**Activity 3, 4, etc.:** *Follow same procedure for each activity.*

**TITLE OF COURSE  
WHICH MIGHT TAKE MORE THAN ONE LINE**

**COURSE No. X**

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All rights reserved. Requests for permission to reproduce  
these course materials should be directed in writing to:

Copyright Reprint Permission  
Training Division  
NeighborWorks® America  
1325 G Street, Suite 800, Washington, DC, 20005  
E-mail: [nti@nw.org](mailto:nti@nw.org)  
Fax: 202-376-2168

---

## TABLE OF CONTENTS

[Name of course should be in the header of each page after title page. Pages within tabs should be numbered in the footer to enable easy referral during the course (1-1, 1-2, 1-3; 2-1, 2-2, etc). Be sure that titles of tabs and segments, as well as page numbers, are consistent with Table of Contents.]

### TAB 1

#### **COURSE OVERVIEW**

- Course Description [If this is not a new course, take updated language from website.]
- Course Objective
- Core Competencies and Learning Objectives
- Agenda

### TAB 2, 3, etc.

**Title of each TAB** [Normally, each TAB would correspond to a distinct segment (day, half day, two-hour block) of the course. Use as many tabs for your material as makes sense and label the final tab number **RESOURCES**.]

- Title of Segment within tab [Use as many bullets as you need within each tab.]

### TAB X

**TAB for each article/handout copyrighted by other authors**

### Last TAB

#### **RESOURCES**

- Books, articles, websites
  - Glossary, if appropriate
  - About the Instructors [Include name and bio of instructor(s) and information on collaborating organization, if appropriate.]
-

NAME OF COURSE

---

**INSERT TAB 1**

---

## COURSE OVERVIEW

**[A model COURSE OVERVIEW to help you create your own.]**

**COURSE TITLE:** Managing a Successful Section 8 Homeownership Program

**LENGTH OF COURSE:** [number of days or hours]: 2 days

**COURSE DESCRIPTION:** [If this is not a new course, take updated language from website.]

Managing a successful Section 8 voucher homeownership program requires a creative and entrepreneurial approach. The course is designed for public housing authorities, nonprofit organizations, housing finance agencies or anyone who has already developed a Section 8 voucher homeownership program and is interested in learning more about effective and proven implementation and management strategies.

**COURSE OBJECTIVE:**

This course will enable (provide knowledge and skills) participants to successfully manage a Section 8 homeownership program.

**CORE COMPETENCIES and LEARNING OBJECTIVES:**

Competency 1: Apply financing structures that complement Voucher Homeownership Programs.

Learning Objective 1a: By the end of session block one, participant will conduct a mock interview with a prospective client and correctly fill out information needed to calculate financing figures.

Learning Objective 1b: By the end of session block two, participant will correctly calculate two of the three innovative financing structures using formulas presented in PHA/NWO partnerships.

Learning Objective 1c: By the end of session block two, participant will use case study example and choose the financing structure that will best serve the conditions of the client and articulate a valid reason for the choice.

Competency 2: Implement pre- and post-purchase counseling and education.

---

Learning Objective 2a: By the end of session day one, participant will identify key actions and questions appropriate for the first pre-purchase counseling session.

Learning Objective 2b: By the end of the morning of day two, participants will demonstrate correct procedures and appropriate interpersonal relations in conducting a post-purchase counseling session.

Learning Objective 2c: By the end of day two, participant will illustrate steps involved in leading a prospective Section 8 client through pre- and post-purchase counseling.

Competency 3, 4, etc. [Use same format as shown in previous examples.]

**AGENDA [Model - multiple day courses should use similar format for each day.]**

**[Important reminders: Morning break must be 15-minute period within window of 9:45-10:30 a.m.; afternoon break must be 15-minute period within window of 2:15-3:00 p.m. Leave 10 minutes at end of last day of course for participants to fill out course evaluations.]**

**Time            Activity [Okay to use module, section or task to organize agenda]**

|       |  |
|-------|--|
| 8:30  | Financing Structures: Obtaining Needed Information<br><br>(Learning Objective(s) 1a, 1b) [Use learning objectives from course overview above.] |
| 10:00 | Break  |
| 10:15 | Financing Structures: Calculating Finance Options<br><br>(Learning Objective 1c)   |
| 11:30 | Lunch  |
| 1:00  | Pre-Purchase Counseling<br><br>(Learning Objective 2a)   |
| 2:30  | Break  |
| 2:45  | Post-Purchase Counseling<br><br>(Learning Objective 2b)  |
| 3:50  | Course evaluations   |
| 4:00  | End of day   |

---

NAME OF COURSE

---

**INSERT TAB 2**

---

NAME OF COURSE

---

**[FOR TAB 2, 3, ETC....]**

**TITLE OF ACTIVITY OR SECTION  
OR MODULE OR TASK**

[Text, graphics, worksheets, handouts, etc., follow.]

[Note: These tabs are divided by course sections according to your course organization. Tabs normally correspond to units, modules or timeblocks.]

---

**[Last TAB]**

## RESOURCES

**[List books, articles, websites that complement course. These are example place-savers – choose your own.]**

### BOOKS AND ARTICLES

*Building Strong Neighborhoods*, 1998. Study Circles Resource Center, Topsfield Foundation, Inc.

Morrish, William, and Catherine R. Brown. 1994. *Planning to Stay*. Design Center for American Urban Landscape, College of Architecture and Landscape Architecture, University of Minnesota.

Reardon, Kenneth. 2000, "An Experiential Approach to Creating an Effective Community-University Partnership: The East St. Louis Action Research Project," in *Cityscape: A Journal of Policy Development and Research, Volume 5, Number 1*, U. S. Department of Housing and Urban Development, Office of Policy Development and Research.

### WEBSITES

PolicyLink  
[www.policylink.org](http://www.policylink.org)

Study Circles Resource Center  
[www.studycircles.org](http://www.studycircles.org)

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**GLOSSARY [include this section as appropriate]**

**[Include any terms that you think it would be helpful to define for participants' future reference.]**

**Consensus building**

Process by which a group comes to collective agreement, creating a “win-win” situation, Differs from unanimity, in which every individual is in agreement with the entire spirit and all elements of a decision; compromise, in which everyone concedes something to come to the agreement; and majority rule, in which the will of the majority prevails and up to 49% of those involved do not get what they want.

NAME OF COURSE

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## **ABOUT THE INSTRUCTOR[S]**

### **INSTRUCTOR NAME[S]**

[Bios are normally a paragraph or two, but never more than one page.]

### **COLLABORATING ORGANIZATION**

[if appropriate and useful information for participants]

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An internet portal is utilized to submit the classroom set-up, audio-visual equipment and supplemental material requirements needed for the initial course offering. This portal is also utilized to submit site visit information for applicable NTI courses.

The portal is located on the vendor's website at: [www.AVPG.com](http://www.AVPG.com)



Select the "Portal" option at the end of the menu on the left side of the site to get to the login page

### Login Page

Login:   
 Password:

Login: NeighborWorks

Password: NW

Both entries are case sensitive.

Complete the form as applicable for your course offering by the required due date. Upon submission, course specific set up information will be retained for use during future course offerings. No additional submissions are required unless a change to the course set up is needed.



NeighborWorks® Training Institute Chicago, IL • 8/17/09 - 8/21/09

Confirmation & Invoice Letter as of 06/22/2009

Ms. Jane Doe

Preferred First Name on Badge: Jane

ABC Corporation  
123 Apple Street  
Washington, DC 20005

Fax: 202-555-9677

**ONLINE REGISTRATION:** No

**REG STATUS:** Confirmed

**REG TYPE:** Non-Network

**REG CODE:** ICURR

**REG ID:** 0000099

**HOTEL:** Palmer House Hilton

**CHECK IN:** 08/16/2009

**CHECK OUT:** 08/21/2009

**ROOMTYPE:** Single

**TRAVEL ARRIVAL:** 08/16/2009

**TRAVEL DEPARTURE:** 08/21/2009

No Courses

**TOTAL DUE:** \$0.00

**PARTICIPANT PAYMENT:** \$0.00

**BALANCE DUE:** \$0.00

Please review the attached Travel and Logistics Guide. You may submit any changes to your event confirmation by contacting customer service at (800) 438-5547 or (202) 220-2454 or trainingevents@nw.org.

NeighborWorks America Tax ID: 52-1148078

**Please include this with your payment**

NTI Chicago, IL • 8/17/09 - 8/21/09

**Balance Due:** \$0.00

RegID: 0000099

Ms. Jane Doe

**Fax credit card payment to (202) 376-2168**

ABC Corporation

Card Type: Visa \_\_\_ MC \_\_\_ AX \_\_\_ Exp. Date: \_\_\_\_\_

**For check payment mail to:**

Credit Card Number: \_\_\_\_\_

NeighborWorks® America Training Division

Name of Cardholder: \_\_\_\_\_

Dept. 167

Signature: \_\_\_\_\_

Washington, DC 20055-0167

*(Signature Authorizes payment in full of above balance due)*

# Travel and Logistics Guide

NeighborWorks Training Institute  
Philadelphia ■ August 16-20, 2010

NeighborWorks Training Institute (NTI) courses will be held at the following locations:

Philadelphia Marriott Downtown  
1201 Market Street  
Philadelphia, PA 19107  
(215) 625-2900

[www.marriott.com](http://www.marriott.com)

**Courses:** Affordable Housing, Asset Management, Community Engagement, Community and Neighborhood Revitalization, and Management and Leadership  
**Connected to Convention Center via skywalk**

Loews Philadelphia Hotel  
1200 Market Street  
Philadelphia, PA 19107  
(215) 627-1200

[www.loewshotels.com](http://www.loewshotels.com)

**Courses:** Construction and Production, Community Economic Development, and Rural Development  
**Directly across the street from the Marriott**

Philadelphia Convention Center  
1101 Arch Street  
Philadelphia, PA 19107  
(215) 418-4700

<http://www.paconvention.com>

**Courses:** Homeownership and Community Lending

## ONSITE REGISTRATION

Located in Grand Ballroom Pre-Function Area, 5<sup>th</sup> Floor of Main Building Philadelphia Marriott Downtown

|                 |                        |
|-----------------|------------------------|
| Sunday          | 3:00 p.m. to 6:00 p.m. |
| Monday–Thursday | 7:00 a.m. to 5:00 p.m. |
| Friday          | 7:00 a.m. to 1:00 p.m. |

**\*\*All participants must check in at Onsite Registration\*\***

## Institute Policies and Procedures

The complete "NeighborWorks Training Institute Policies and Procedures" is available online at <http://nw.org/network/training/about/policies.asp> or by contacting NeighborWorks America's Training Division at 1-800-438-5547 or e-mail [nti@nw.org](mailto:nti@nw.org).

All participants are required to check in at Onsite Registration. At onsite registration you will receive an information packet and name badge. Your detailed event transcript, including your course selections and room locations, will be emailed to you approximately one week prior to the event. Please make sure you have provided an updated email address with your registration or send us your email address at [nti@nw.org](mailto:nti@nw.org).

**Attendance:** Courses begin promptly at 8:30 a.m. and end at 4:00 p.m. each day except on Friday when courses end at 2:30 p.m. \*\* Certificates are issued only to participants who have attended and completed 100% of the course. There are no exceptions to this policy.

**Note regarding Friday course hours:** In an effort to better meet participant travel needs and optimize your institute experience, all courses will end promptly at 2:30 p.m. on Fridays, rather than at 4:00 p.m. as on other course days. The additional hour-and-a-half will be made up based on the consensus of course participants (shortening lunches, starting earlier than 8:30 a.m., etc.). Check with your instructor for more details, and remember that certificates are given only to participants who remain for the entire course.

**Special Needs:** If you have special needs addressed by the American with Disabilities Act, please notify NeighborWorks one month prior to the event.

**Travel Arrangements:** Once you have received your confirmation, you can make your travel arrangements. *To ensure a full learning experience and to better accommodate airline check-in and departure, do not schedule departure travel earlier than three hours after the end of your last course.*

- **Non-NeighborWorks Network Organizations:** Participants are responsible for making their own travel arrangements.
- **NeighborWorks Network Organizations and Faculty:** Contact Directravel at 1-866-492-9834 or email [nwa@dt.com](mailto:nwa@dt.com) or [nyteam@dt.com](mailto:nyteam@dt.com) to make your travel arrangements with one of Directravel's agents. Your airfare is covered through the use of your training slot. If you cannot secure a return flight to get you to your home airport by 11:00 p.m. local time on the last day of your course, you may stay an additional night in the hotel at our expense if the request is made by **July 16, 2010**. However, if you requested a single room, the extra single room night upgrade charge will be the responsibility of your organization or you. *Make travel arrangements with Directravel no later than July 16, 2010. If travel arrangements have not been made at least three weeks prior to the NTI, you may be responsible for the difference in airfare if the cost of a roundtrip is \$900.00 or more. NeighborWorks America has advised Directravel to book the lowest fare, which in some cases will be a non-refundable ticket. If changes are made to a non-refundable ticket, any costs associated will be the responsibility of the participant, not NeighborWorks America. Please note that there is also a fee for Directravel to make any changes, so please plan wisely.* If you have exhausted your NTI slots and still plan to attend, you are responsible for making your own hotel and travel arrangements. If you wish to make your own travel arrangements, NeighborWorks America will reimburse you or your organization only for the airline, bus or train ticket up to the amount the ticket would have cost us. However, you must receive permission from NeighborWorks America before purchasing your own ticket, otherwise your expenses may not be reimbursed.
- **Scholarship Recipients:** Most scholarship programs cover tuition only; however, review your scholarship award letter to verify. **If your scholarship covers travel or lodging you are responsible for notifying NeighborWorks America if you decide to cancel by July 16, 2010.**
- **Check-in Baggage Fee:** Many airlines charge a fee for each checked bag. Please check with your airline carrier for carry-on and checked baggage fees. NeighborWorks will not reimburse for this expense.

**Accommodations:** Guestrooms are available after 3:00 p.m. the day before your courses start, and check-out is before 12:00 p.m. on the last day of your course. For directions to a hotel, contact the hotel directly or visit the hotel's website..

- **Scholarship Recipients:** Most scholarship programs cover tuition only; however, review your scholarship award letter for details. **Early departure fees may also be assessed if you fail to inform NeighborWorks prior to your arrival.** You will be asked by the hotel to leave a \$50.00 deposit upon check-in by cash, credit or debit card, which will allow you access to the in-room telephone. This is a one-time charge unless you spend more than your deposit. **All lodging change requests should be made by July 16, 2010 and will be handled on a case-by-case basis. No changes will be made on-site.**
- **NeighborWorks Network Organizations:** Through the use of a training slot, your shared lodging accommodations are covered by NeighborWorks America for the guestroom charge only. Please note your hotel assignment on your event confirmation letter. If you would like to upgrade to a single room, the rate is \$92.00 per night and you or your organization must pay the cost for the full stay at the time of registration or no later than **July 16, 2010**. Whether you are in a shared room or single room, you will be asked by the hotel to leave a \$50.00 deposit upon check-in by cash, credit or debit card, which will allow you access to the in-room telephone. This is a one-time charge unless you spend more than your deposit. If you have exhausted your NTI slots and still plan to attend, you are responsible for your lodging. **"No-show" participants as well as cancellations made within 72 hours of confirmed arrival will be assessed a charge for the first night's hotel stay for the unused room. Early departure fees will also be assessed if you fail to inform NeighborWorks prior to your arrival. All lodging change requests should be made by July 16, 2010 and will be handled on a case-by-case basis. No changes will be made on-site including upgrade and roommate switches.**

Please read your confirmation letter carefully for your hotel assignment. Shared guestroom accommodations are included as part of your training grant. While we cannot guarantee your roommate preference, we make every attempt to match you with your preferred participant. You are required to notify the NeighborWorks Training Institute on-site housing coordinator no later than 12:00 p.m. on the next day if your roommate does not check-in to your shared room so that you can be re-paired with another roommate.

- **Non-NeighborWorks Network Organizations:** You are responsible for making your own lodging arrangements. A number of guestrooms will be available for participants at the Marriott Philadelphia Downtown and Loews Philadelphia, but to guarantee a room, reservations must be made by **July 23, 2010**. Rooms are available on a first-come, first-served basis. Call the hotel directly to make your reservations and mention you are a NeighborWorks Training Institute participant. The rates at both the Marriott and Loews are \$153.00 single/double per night. An additional 15.2% city and occupancy tax will be added. You will be asked by the hotel to leave a \$50.00 deposit upon check-in by cash, credit or debit card, which will allow you access to the in-room telephone. This is a one-time charge unless you spend more than your deposit.

**Changes, Cancellation, Refunds and Substitutions:** Substitutions can be handled by contacting us at 1-800-438-5547 or e-mailing us at [nti@nw.org](mailto:nti@nw.org) at least three weeks prior to the NTI. Cancellations will be processed upon notification. The amount of refund or tuition credit is determined by the date of the cancellation notification. Changes must be submitted three weeks prior to the start date of the event. Please refer to the complete "NeighborWorks Training Institute Policies and Procedures" as the policy differs for participants from NeighborWorks Network Organizations and Non-NeighborWorks Network Organization. Requests for course changes will be accommodated subject to availability. Up to three weeks prior to the NTI call 1-800-438-5547 to request changes. During the NTI, check the Course Availability Board and make changes at the on-site registration area.

### Services Provided

*For questions regarding services provided by our hotels (business center, gym, etc.), please refer to the hotel's website listed on the previous page.*

**Institute Office:** Specific room locations will be provided in your registration folder. Staff is available on Sunday (3:00 p.m. - 6:00 p.m.), Monday – Thursday (7:00 a.m. - 5:00 p.m.), and Friday (7:00 a.m. – 4:00 p.m.). After hours, you can reach NTI staff by calling the hotel operator and asking for the "NeighborWorks Manager on Duty."

**Afternoon Workshops:** Free afternoon workshops are offered on Monday and Tuesday from 4:30 p.m. to 6:00 p.m. Information will be provided in your onsite registration packet.

**CyberCafé:** You can check your e-mail during course days at the CyberCafé. Location and hours of operation will be provided in your onsite registration packet.

**Institute Store:** T-shirts, tote bags, and books are available throughout the week at the Institute Store, located in the onsite registration area.

**Meals:** Meals are at your own expense. A light continental breakfast and afternoon beverage break will be provided. Additionally, light hors d'oeuvres will be served at the Networking Reception on Wednesday.

**Messages:** There will be a message board near the registration area where you can leave messages for other participants.

**NTI SPECIAL EVENTS ON AUGUST 18  
AT THE PHILADELPHIA MARRIOTT  
DOWNTOWN**

**AH910 Symposium  
A New Era in Affordable Housing: Investing  
for Impact in Sustainable Communities**

8:30 a.m. – 4:00 p.m.  
Lunch included\*

**Networking Reception**

5:30 p.m. – 7:00 p.m.  
Open to all participants  
No ticket required

\*Luncheon is part of the symposium  
registration for this course. Ticket required.

Per TSA's Secure Flight guidelines, you must provide your travel arranger with your legal name (exactly as it appears on your government-issued photo identification), date of birth, gender and redress number (if applicable). For more information, visit [www.tsa.gov](http://www.tsa.gov).

## Transportation Information for this Institute

### **Parking at Institute Locations:**

- Philadelphia Marriott Downtown – Valet Parking is \$43.20 per day with in and out privileges
- Loews Philadelphia Hotel – Valet Parking is 38.00 overnight with in and out privileges
- Philadelphia Convention Center – no parking available at the Convention Center; however there are several parking lots close to the venue and prices vary.

### **Taxi Service:**

For specific information on taxi companies, please visit [www.philadelphiausa.travel](http://www.philadelphiausa.travel)

### **Shuttle Service:**

There is shuttle service information in baggage claim. For more information on pricing and availability, please visit [www.philadelphiausa.travel](http://www.philadelphiausa.travel)

### **Philadelphia Airport Rail:**

Before going down to baggage claim follow the signs for the Philadelphia Airport Rail past the security gates. The train picks up at all terminals and runs continuous loop every 30 minutes 24 hours a day. You can purchase passes with cash or credit card at the airport. The cost per ride is \$7.25 per person. For more info on routes, fares and schedules please visit [www.septa.org](http://www.septa.org)

## Important Dates to Remember

Travel Arrangements must be made by: July 16, 2010

Hotel Changes must be made by: July 16, 2010

Substitutions/Cancellations and Replacements: July 26, 2010



# PLEASE READ!

## ATTENDANCE ROSTER INSTRUCTIONS for FACULTY

1. Submit Rosters to the Faculty Office by 10:30 a.m. (DAILY)

Take attendance by calling out each participant's name. **DO NOT** pass around the attendance roster as this creates errors or missed participants and will result in a participant being listed as Incomplete or No Show for a class and not receiving a completion certificate. If after the first day of a course a participant's name does not appear on the roster "confirmed list" and you are sure that participant has been in the course the full time then the Faculty Office must be alerted so that the participant can be put back into the class as having fully attended and a certificate will be produced for them. For Faculty teaching a class that has other concurrent sessions, please note that if a participant is not showing up on your attendance sheet they may be in the wrong session of the class. Participants should not be switching classes after the first day for concurrent sessions as it will result in their attendance records not showing full attendance in either course and customer complaints when they do not receive a certificate of completion.

2. Mark a check in the "In Class" box next to the names of participants in attendance.
3. Mark a check in the "Absent" box next to the names of participants who do not show.
4. At the bottom of the form, add the names and registration id (if available) of attendees whose names are not listed on the roster. If a participant is not listed on your course roster on **ONLY** the **FIRST DAY** of the class, please request that they submit a completed **COURSE ADMITTANCE SLIP** signed by the Registration Staff and attach it to the roster or a copy of their transcript showing they were placed in that course. This is proof that the participant registered the morning of the course and should cut-down on a number of participants that have been sitting in courses without registering or hopping into and out of different courses to retrieve the materials. If a participant is not listed on the roster after the first day of the course and they have a transcript proving they registered, this means they have been triggered as **NO SHOW** or **INCOMPLETE** and basically were recorded as absent or not attending the class for its entirety and therefore will not get a certificate. Again, if you feel this is incorrect and are able to vouch for the participant's full attendance please contact the Faculty Office immediately.

## COURSE ADMITTANCE SLIP

| Course Admittance Slip |              |      |           |
|------------------------|--------------|------|-----------|
| Mr./Ms.                |              |      |           |
| Organization           |              |      |           |
| Course Number          | Course Title |      |           |
| Course Location        |              |      | Room Name |
| Staff Name             | Date         | Time | am<br>pm  |



## Class Attendance Roster

NeighborWorks® Training Institute Chicago, IL • 8/17/09 - 8/21/09

AH101: Affordable Housing Development

Start: Monday, August 17, 2009, 8:30 AM to  
 End: Tuesday, August 18, 2009, 4:00 PM;  
 Location: -

Total Confirmed Participants: 13

Faculty: Alan Arthur                      People ID: 86228  
 Faculty: Maureen Markham            People ID: 122455

**NOTE to Instructor: This Roster is due to the Event Faculty Office by 10:30 AM Daily**

Insert Check Mark in  
 correct column to track  
 attendance

### Confirmed Participants with 100% Attendance

| In Class                 | Absent                   | Reg ID  | Course Status | Name                | Organization                                |
|--------------------------|--------------------------|---------|---------------|---------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 9367755 | Confirmed     | Ashley Bross        | NeighborWorks® America - DC                 |
| <input type="checkbox"/> | <input type="checkbox"/> | 9367318 | Confirmed     | Claudia Cahue       | Illinois Housing Development Authority      |
| <input type="checkbox"/> | <input type="checkbox"/> | 9367113 | Confirmed     | Angela Carson       | Mid South Community Development Corp.       |
| <input type="checkbox"/> | <input type="checkbox"/> | 9367702 | Confirmed     | Molly M. Chao       | Chinatown Community Development Center      |
| <input type="checkbox"/> | <input type="checkbox"/> | 9367864 | Confirmed     | Douglas M. Gaither  | NeighborWorks® America - SO                 |
| <input type="checkbox"/> | <input type="checkbox"/> | 9365448 | Confirmed     | Cheryl R. Gilbert   | East Carolina Community Development, Inc.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 9365716 | Confirmed     | Josh Griff          | Rural Community Assistance Corporation (CO) |
| <input type="checkbox"/> | <input type="checkbox"/> | 9367452 | Confirmed     | Joann Jackson       | Nuestra Comunidad Development Corp.         |
| <input type="checkbox"/> | <input type="checkbox"/> | 9367389 | Confirmed     | Jennifer McAllister | Manna, Inc.                                 |
| <input type="checkbox"/> | <input type="checkbox"/> | 9367391 | Confirmed     | Alan Perry          | Champlain Housing Trust                     |
| <input type="checkbox"/> | <input type="checkbox"/> | 9366665 | Confirmed     | Warner Rodriguez    | NeighborWorks New Horizons                  |
| <input type="checkbox"/> | <input type="checkbox"/> | 9365947 | Confirmed     | Jonnye Williamson   | Savannah Housing Corporation                |
| <input type="checkbox"/> | <input type="checkbox"/> | 9365946 | Confirmed     | Robert Williamson   | Savannah Housing Corporation                |

### Additions to Course Attendance Roster:

The below participants must show proof of registration in class via a transcript and/or course admittance slip. Participants without proof of registration must report to Registration or the Event Office to register.

| Reg ID | Name | Organization |
|--------|------|--------------|
|--------|------|--------------|

**NOTE to Instructor: This Roster is due to the Event Faculty Office by 10:30 AM Daily**

# NeighborWorks® Training Course Evaluation

Your opinion is very important to use as we plan future training events. Please take a few minutes to give us your feedback for this course.

Training Location: \_\_\_\_\_

Course ID: \_\_\_\_\_

### MARKING INSTRUCTIONS

- Use a No. 2 pencil or a blue or black ink pen only.
- Do not use pens with ink that soaks through the paper.
- Make solid marks that fill the response completely.
- Make no stray marks on this form.

CORRECT: ●

INCORRECT: ✓ ✗ ☐ ○

### INSTRUCTOR(S)

Instructor #1 Name: \_\_\_\_\_

Instructor #1 ID: \_\_\_\_\_

1) Rate this instructor's ability to communicate the subject matter effectively.

① Poor                      ② Fair                      ③ Good                      ④ Very Good                      ⑤ Excellent

2) Rate this instructor's organization and lesson plan.

① Poor                      ② Fair                      ③ Good                      ④ Very Good                      ⑤ Excellent

3) Rate this instructor's use of a variety of methods that effectively engage participants and support learning.

① Poor                      ② Fair                      ③ Good                      ④ Very Good                      ⑤ Excellent

Comments for Instructor #1:

Instructor #2 Name: \_\_\_\_\_

Instructor #2 ID: \_\_\_\_\_

4) Rate this instructor's ability to communicate the subject matter effectively.

① Poor                      ② Fair                      ③ Good                      ④ Very Good                      ⑤ Excellent

5) Rate this instructor's organization and lesson plan.

① Poor                      ② Fair                      ③ Good                      ④ Very Good                      ⑤ Excellent

6) Rate this instructor's use of a variety of methods that effectively engage participants and support learning.

① Poor                      ② Fair                      ③ Good                      ④ Very Good                      ⑤ Excellent

Comments for Instructor #2:

Instructor #3 Name: \_\_\_\_\_

Instructor #3 ID: \_\_\_\_\_

7) Rate this instructor's ability to communicate the subject matter effectively.

① Poor                      ② Fair                      ③ Good                      ④ Very Good                      ⑤ Excellent

8) Rate this instructor's organization and lesson plan.

① Poor                      ② Fair                      ③ Good                      ④ Very Good                      ⑤ Excellent

9) Rate this instructor's use of a variety of methods that effectively engage participants and support learning.

① Poor                      ② Fair                      ③ Good                      ④ Very Good                      ⑤ Excellent

Comments for Instructor #3:



## Participant Satisfaction Survey

As of May 2010, the Participant Satisfaction Survey is conducted on-line immediately following each event instead of via a paper survey passed out and completed in the individual classrooms by participants during the NTI.

# Important Faculty Information

## New End Time for Friday Courses

Beginning with the NeighborWorks® Training Institute in Phoenix (May 2007), a new procedure was implemented related to courses that end on Fridays.

To accommodate participant travel needs and optimize their institute experience, **all courses that end on Friday will finish promptly at 2:30 p.m.** rather than at 4 p.m. **No courses are to end earlier than 2:30 p.m.**

NTI faculty will make up the 1½ hour of instruction by making modest changes (e.g., shorter lunches, adjusting start/end times) with input from participants.

The recommended adjustments for Thursday and Friday courses would be ending at 4:30 p.m. on Thursday (rather than 4 p.m.); and shortening the Thursday and Friday lunches to one hour (rather than 90 minutes). Only participants who stay until 2:30 p.m. on Friday will receive course certificates.

These changes are in response to issues raised by participants on the training institute evaluations, which have included:

- Some resent paying tuition for a full day of instruction on Friday if they do not receive that.
- Some resent staying until 4 p.m. while others are dismissed much earlier. If they come with a colleague whose class ends earlier than theirs; their joint flight and hotel arrangements are affected.
- Some resent those who leave early and receive the same certificate and continuing education units as they do.
- Participants schedule their flights based on a full day of instruction; when that changes, it is difficult and/or involves fees if changes are made. Sometimes, they have had to stay another night at the hotel because their assumption was that the class was a full day.

For all of these reasons, we decided to implement this standard Friday course end-time.

Thank you for your understanding and collaboration. If you have any questions, concerns or ideas regarding course hours, please consult your training manager.

# Invoice & Expense Submission Reminder

- **You MUST have a Task Order, Honorarium, or Expense Letter on file to provide service. Your task order must be signed and returned to NeighborWorks® America within 10 days of receipt. Do not hold them until the event is over. If they are received or signed after the event, this could delay getting paid.**
- **NeighborWorks' standard processing time is that payments will be mailed out or direct deposited within 30 days of received invoice or required receipts for expense reimbursements. If required receipts are not received – this will cause a delay in you receiving your expense payment.**
- **Also, do not sign your expense report. That is for Training Division Managers to do.**
- **Make sure Fee Confirmation Letter (*Task Order or Honorarium*) has been signed and dated by addressee.**
- **Submit Invoice and/or Expense form within 30 days of task performed via e-mail or mail..**
  - ❑ **NOTE: Fee amount subject to penalties beyond 30 days**
  - ❑ **NOTE: *Task Order or Honorarium is not an invoice***
- **Daily Per Diem rate is \$50 (meals only/tips included). You must list actual amounts paid on a daily basis. You cannot repeat the same amount each day or you will be asked to provide receipts.**
- **You must also submit original receipts for all miscellaneous expenses such as shipping, copies, office supplies, and/or training materials regardless of the cost.**
- **You must submit original receipts for all taxi's, shuttles, parking, or any other mode of transportation that total \$75 or more for the week.**
- **Bills submitted for alcoholic beverages will not be honored.**
- **Pre-approval from the Training Consultant must be obtained for resource materials being purchased.**
  - ❑ **NOTE: *Expenses for souvenirs, prizes, or treats for class participants are not eligible for reimbursement.***
- **Mileage rate is \$.50 per mile (Effective January 1, 2010) and will be verified via Map Quest. Please include in the To/From column where you are leaving from, especially the name of the airport, so that mileage can be calculated correctly. You can also provide this report yourself if you wish to.**
- **If you purchase your own airline ticket, we need an original receipt. It must show payment information. Also, you can go to our government citypairs website to verify the government price. You must print out a copy and attach it to your expense report. (<http://apps.fas.gsa.gov/citypairs/search/>)**
  - ❑ **NOTE: *Purchase price reimbursable up to the cost of an economy GSA airline ticket.***

June2010



## TRAVEL REIMBURSEMENT PROCEDURES FOR NON-STAFF (UPDATED MAY 2010)

1. Complete the attached non-staff expense form and attach original receipts for all expenses over \$75 indicated (lodging, parking, tolls, etc.). If your transportation (taxi, shuttle, etc.) total \$75 or more for the entire week, you will need original receipts.
2. If you drive to the NeighborWorks® America event, mileage is reimbursable from your office address to the event address as verified by [www.mapquest.com](http://www.mapquest.com) (along with tolls and parking). The current mileage rate is \$.50 per mile (*Effective January 1, 2010*) and will be verified via Map Quest. Please include in the To/From column where you are leaving from, especially the name of the airport, so that mileage can be calculated correctly. You can also provide this report yourself if you wish to.
3. The total mileage reimbursement can not exceed the cost of the round-trip government airfare.
4. If you purchase your own airline ticket, we need an original receipt. It must show payment information. Also, you can go to our government website to verify the government price. You must print out a copy and attach it to your expense report. (<http://apps.fas.gsa.gov/citypairs/search/>)

*NOTE: Purchase price reimbursable up to the cost of an economy GSA airline ticket.*

5. NeighborWorks® America will reimburse the organization for a traveler's airfare, train or driving expense up to the amount that an air ticket would have cost NeighborWorks® America at the government rate. If the submitted expenses are less than the government rate, the organization will receive the lesser amount. The complete NeighborWorks® Training Institute Policies and Procedures is available online at: <http://nw.org/network/training/about/TravelPolicy.asp>
6. Submit request within 30 days of the Training Institute.
7. Payment will be issued to you or your organization as outlined in the fee confirmation (task order, honorarium or expense) letter.
8. Please E-Mail or Mail this Form Within 30 Days after the Training Event To:

Vanessa Rodney, Payment Specialist  
NEIGHBORWORKS® AMERICA  
TRAINING DIVISION  
1325 G STREET, NW  
SUITE 800  
WASHINGTON, DC 20005  
(202) 220-2421

[vrodney@nw.org](mailto:vrodney@nw.org)