

NeighborWorks Training Institute • National Harbor, MD

Free Workshops 4:30 p.m. – 6:00 p.m.

MONDAY, DECEMBER 6

CounselorMax®: Taking Productivity to the Max

Location: Potomac Ballroom 3/4, Conv. Center Ballroom Level

Join us to learn how this web-based application can be a huge help to homeownership counselors looking to bring their growing list of administrative tasks down to size. CounselorMax is a leading, comprehensive client management system with all the tools needed to track the intake, activities, education, counseling, ongoing status of clients and more. In addition, its standard industry and customized reporting can dramatically streamline your agency's workflow. Complementing this overview is a demonstration of recently added enhancements such as the transmission of documents to Hope Loan Port. Bring your business cards to be eligible for a drawing.

Presenters: Kelli Baxter, Kevin Prophet, Courtenay Hansen – NeighborWorks America

Fannie Mae, Freddie Mac, and the Federal Home Loan Banks: What CDCs Need to Know

Location: Woodrow Wilson Ballroom B, Hotel Ballroom Level

A key part of the mission of the Federal Housing Finance Agency (FHFA) is to provide effective supervision, regulation and housing mission oversight of Fannie Mae, Freddie Mac and the 12 Federal Home Loan Banks (FHLBanks). Learn from FHFA staff about the mission-related activities of these Government-Sponsored Enterprises (GSEs) and take part in an interactive exchange with their regulator about how the GSEs can assist you in your work.

Presenter: Laura Arce – FHFA

Foreclosure Mediation and Reconciliation Programs: The Counselor's Role

Location: National Harbor Room 12, Center Conference Room Level

In response to the foreclosure crisis, increasing numbers of jurisdictions are implementing mediation/reconciliation programs that create the opportunity for lenders and homeowners to reach an alternative to foreclosure sale. Housing counselors can play a central role in these programs and often act as the homeowner's sole advocate in these proceedings. The workshop will examine some successful mediation models, discuss ways counselors can play a role in establishing those programs, and how they can be effective advocates in the mediation context. Topics will include:

- working with servicers and mediators to devise solutions for avoiding defaults,
- preparing your client for the mediation,
- requesting and reviewing loan documents,
- tapping into state and federal resources,
- coordinating with homeowners' attorneys, where available, and
- negotiating "graceful exits" like Cash for Keys, short sales, etc.

Presenters: TBA

Managing a Scattered-Site Rental Program: NeighborWorks America's New Manual

Location: National Harbor Room 13, Conv. Center Conference Room Level

More and more organizations and funders are looking to scattered-site rental projects to address issues of vacancy, slow homeownership markets, and increased demand for family rental housing. However, developing and managing scattered-site rental properties is challenging and fraught with long-term risks. In this session, NeighborWorks America's Stable Communities Initiative

will introduce its new program manual for organizations considering scattered site rental projects. We will review the manual content and discuss obstacles and solutions for running an effective scattered site rental program.

*Presenters: Doug Harsany, Jeremy Newberg
Capital Access*

National Community Stabilization Trust: Programs and Services (and How to Participate!)

Location: Woodrow Wilson Ballroom A, Hotel Ballroom Level

The National Community Stabilization Trust facilitates the transfer of foreclosed and abandoned properties from the nation's largest financial institutions of housing organizations across the country to promote the stabilization of neighborhoods hard hit by the foreclosure crisis. Community-based housing organizations with acquisition and rehab programs are invited to come learn more about how becoming a participating property buyer through the Stabilization Trust can add efficiency and capacity to your organization, and increase the scale of neighborhood-based property reuse strategies.

Presenter(s): TBA

NeighborWorks Mortgage Source: An Overview

Location: Chesapeake 8/9, Conv. Center Ballroom Level

Come see the latest and greatest technology that is revolutionizing the way your client can get a mortgage. NeighborWorks has formed a partnership with a technology and loan fulfillment center that will eliminate any possibility of predatory lending, make your life easier and help your customer get the best mortgage available. You'll learn how fast and simple it is to navigate today's complex mortgage world while at the same time helping your client get a safe and affordable loan.

Presenter: Tammy Butler – Direct Lending Family

New Tools for Assessing the Outcomes for Clients in Your Asset-Building Programs

Location: National Harbor Room 6, Conv. Center Conference Room Level

Do you want to better understand how your financial education, homebuyer/homeowner education or other financial capability programs benefit clients over time? Come learn about a new set of tools, tested and launched by the Success Measures Program, aimed at helping organizations assess changes in the financial behavior and attitudes of clients participating in their financial capability programs. Learn from the experiences of

practitioners who piloted these tools to gain a deeper understanding of the impact and effectiveness of their programs.

Presenter: Nancy Kopf – NeighborWorks America

Preserving Homeownership: Tips and Tools for Foreclosure Intervention Counselors

Location: National Harbor Room 11, Conv. Center Conference Room Level

In this challenging environment, it is pertinent that foreclosure intervention counselors be equipped with the most up to date information necessary to work with servicers and help keep clients in their homes. This workshop will feature in-depth discussions which will cover tips & tools for working with servicers, available resources for counselors & their clients, an overview of how to assemble a hardship assistance package and much more. Join us with your questions and ideas!

Presenter(s): TBA

Strategies for Combating Mortgage Rescue Scams in Your Community

Location: Woodrow Wilson Ballroom D, Hotel Ballroom Level

The Loan Modification Scam Campaign has been in communities across America for a little over a year. During this short period of time local non-profit organizations have been able to achieve relative amounts of success within the communities they serve. This workshop will provide practical strategies for educating homeowners about modification scams. In addition, you will learn some basic strategies for capturing the media's attention.

Presenters: Barbara Floyd Jones – NeighborWorks America, and Emilie Moghadam – Fleishman Hillard

The Truth in Lending Act: Recent and Pending Changes

Location: Chesapeake 10/11/12, Conv. Center Ballroom Level

The Federal Reserve recently announced several proposed, interim and final rules that affect Truth in Lending Act (TILA) disclosure requirements and practices beginning as early as January 2011. This session will highlight the rules and other upcoming TILA changes that can affect mortgage lending and services activities. Come find out what you need to know to be prepared!

Presenter: Kevin Flanagan – Community Lending Solutions

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TUESDAY, DECEMBER 7

Careers in Community Development: Turn Your Passion into Your Profession

Location: National Harbor Room 11, Conv. Center Conference Room Level

You're already interested in the field of community development – maybe you found it by accident, maybe you've been volunteering and think, "I love my volunteer work – imagine doing this full-time!" You can. The community development field offers a wide range of career opportunities in many different areas – not just direct service work such as homeownership counseling but also construction, IT, training, administrative assistance, urban planning, engineering, architecture, volunteer management, project management, proposal writing and so much more! In the workshop, you will learn more about what is meant by "the community development field," hear tips on how to market your volunteer work and other skills to move into the job of your dreams and discover some resources to begin your search. Come hear from professionals with a view of the entire field and the real experts (practitioners in the field!) about the opportunities available and how to best position yourself to find a fulfilling career that you will love!

Presenter: Deborah Wise – NeighborWorks America

Educational Opportunities in Community Economic Development

Location: Maryland Ballroom 1/2, Conv. Center Ballroom Level

Community economic development as a calling or a career can be enhanced by acquiring an academic credential. The partnership between NeighborWorks America and Southern New Hampshire University offers an opportunity to enhance your skills by furthering your education.

Presenter: Jolan Rivera – Southern New Hampshire University

FOR NEIGHBORWORKS ONLY: Maximizing Your HUD Housing Counseling Funding

Location: National Harbor Room 4, Conv. Center Conference Room Level

This workshop has been developed as part of NeighborWorks America's ongoing support to network organizations receiving HUD Housing Counseling funding.

In this session we will discuss accurate completion of the HUD 9902, the performance review process, work plans, and more. Tips and strategies will be shared that will help make this funding year a successful one.

Presenter: Sheila Squier – SASquier Consulting

Homeownership Done Right: How to Promote Your Services Using the National Industry Standards

Location: Chesapeake A/B, Conv. Center Ballroom Level

Would you like your organization to stand out from the pack, to instill confidence in your clients, and to highlight your commitment to quality service to potential funders? The National Industry Standards are a set of training and performance benchmarks designed to promote increased quality, reliability and professionalism in the delivery of homeownership education and counseling programs. Join us to learn more about how your organization can adopt the Standards, and how to access the marketing tools needed to raise awareness for your organization and the homeownership counseling and education field.

Presenters: Tosin Durotoye, Alexander Novelli – NeighborWorks America

Hope LoanPort: A Tool for Maximizing Efficiencies and Providing Transparency

Location: National Harbor Room 13, Conv. Center Conference Room Level

HOPE LoanPort was developed to address communication barriers between counselors and servicers. This web-based application allows counselors to electronically submit complete modification packages to servicer partners, with confirmation of receipt, status tracking and electronic messaging between parties. HOPE LoanPort provides secure transmission that eliminates the reliance on faxes, e-mail, and repeat phone calls. The development of this tool has resulted in a standardized package for HAMP modifications, paving the way for consistent processes and shortened timelines for decisions.

Presenters: Katie King – SunTrust and Pramod Karachur – IndiSoft LLC

How to Apply for CDFI Certification Status: The Basics

Location: Potomac Ballroom 5/6, Conv. Center Ballroom Level

Community development lenders have the potential to

meet the requirements to be certified by the US Treasury Department's CDFI Fund as a CDFI. CDFI Certification opens the doors for possible new sources of capital. Learn about the six criteria for Certification, and see if your organization is likely to qualify ~ or what you can do in order to qualify. This session is taught by a former CDFI Fund senior manager. Have a question about Certification? THIS is the place to get that question answered.

Presenter: Frederic Cooper

Making Home Affordable Updates, Including FHA

Location: Chesapeake 10/11/12, Conv. Center Ballroom Level

Join us for this workshop and come away with a better understanding of the Making Home Affordable Program and its newly announced enhancements. A representative from FHA will also speak about FHA loans with Making Home Affordable. There will be a question-and-answer session after the presentations, so bring your questions.

Presenter(s): Danielle Johnson-Kutch – Treasury

Overview of the New Consumer Protection Bureau

Location: Chesapeake 8/9, Conv. Center Ballroom Level

The launch of the new Consumer Financial Protection Bureau (CFPB) next year will dramatically change the regulatory landscape, and could introduce a significant number of new consumer lending requirements. This session will explore the proposed structure of the CFPB, including its current mandates, powers and limitations. Join us to get a preview!

Presenter: Kevin Flanagan – Community Lending Solutions

Unlock a New Market with an Employer-Assisted Housing Program

Location: Woodrow Wilson Ballroom B, Hotel Ballroom Level

Learn how to reach out to local employers to discuss employer-assisted housing (EAH) as a unique benefit to offer to their employees as a way to help them with their housing needs. The workshop will include a brief overview of EAH and how the National Association of REALTORS is showing REALTORS how to work with non-profit housing organizations in their communities to implement an EAH program. EAH programs include homebuyer education and counseling for employees and benefits not only the employee but also the employer and community. You will also hear from two NeighborWorks organizations that currently have EAH programs in place and are working with employers to administer and manage their EAH benefit plans.

Presenters: Lessley Wood – Housing Partnership Inc., Irma Yopez Klassen – Select Milwaukee, Holly Moskerintz – National Association of Realtors®

Update on New Energy Star Homes Guidelines

Location: National Harbor Room 12, Center Conference Room Level

The EPA has released a new set of more rigorous guidelines for homes to earn the Energy Star label. These guidelines go into effect in January 2011, with further advancements coming in 2012. Come hear an expert on the Energy Star Homes program describe the details of the new requirements and get your most pressing questions answered.

Presenter: TBA

THURSDAY, DECEMBER 9

Counseling Agency Compliance with the New IRS 501Q Rule

Location: Potomac Ballroom 5/6, Conv. Center Ballroom Level

Is your counseling organization compliant with the latest HUD counseling agency requirements and IRS 501Q rules relating to nonprofit exemption status? The IRS 501Q rule was passed buried under the Pension Reform Act, and received little attention from the housing sector. This rule requires that a counseling agency be separated from the organization's lending operation. In other words, you must create a new entity to house your lending operation in order to be compliant. The parent organization, typically the counseling agency, cannot own or control more than 35% of the new organization; otherwise, you are jeopardizing your nonprofit status. This session outlines the new challenges in counseling business models, and the potential impact on nonprofits that offer multiple types of services to the public.

Presenter: Kevin Flanagan – Community Lending Solutions

Unless specifically presented by NeighborWorks America, these workshops are independently developed and delivered, and NeighborWorks America is not responsible for their content; nor do we endorse any tools or information presented.