



## REQUEST FOR APPLICATIONS

### 2018 CALIFORNIA STATEWIDE AFFORDABLE HOUSING DEVELOPMENT TRAINING INSTITUTE (HDTI)

Local Initiatives Support Corporation (LISC) is pleased to announce that it is accepting applications for its 2018-19 California Affordable Housing and Community Development Training Institute (HDTI) for non-profit community development corporations. Approximately 40-45 participants will be selected by the Bay Area, Los Angeles and San Diego LISC offices to participate in this yearlong comprehensive training in affordable housing development within a community development context.

**All applications are due by 5:00 p.m. on August 15, 2018. You must use the online application associated with your local LISC office.**

**Organizations are limited to no more than 2 applicants.** Please discuss with your local LISC office if you have more applicants.

#### **Bay Area LISC**

Laurel Engbretson, [LEngbretson@lisc.org](mailto:LEngbretson@lisc.org), (415) 870-4142

**Application:** [https://www.surveymonkey.com/r/LISC\\_2018HDTI\\_BayArea](https://www.surveymonkey.com/r/LISC_2018HDTI_BayArea)

**Application attachments emailed to:** [balisc@lisc.org](mailto:balisc@lisc.org)

#### **Los Angeles LISC**

Alexandra Dawson, [ADawson@lisc.org](mailto:ADawson@lisc.org), (213) 240-3118

**Application:** [https://www.surveymonkey.com/r/LISC\\_2018HDTI\\_LosAngeles](https://www.surveymonkey.com/r/LISC_2018HDTI_LosAngeles)

**Application attachments emailed to:** [lalisc@lisc.org](mailto:lalisc@lisc.org)

#### **San Diego LISC**

Kwofi Reed, [kreed@lisc.org](mailto:kreed@lisc.org), (619) 541-8015 OR Karina Velazquez, [kvelazquez@lisc.org](mailto:kvelazquez@lisc.org), (619) 541-8016

**Application:** [https://www.surveymonkey.com/r/LISC\\_2018HDTI\\_SanDiego](https://www.surveymonkey.com/r/LISC_2018HDTI_SanDiego)

**Application attachments emailed to:** [sandiego@lisc.org](mailto:sandiego@lisc.org)

After the initial review of the applications, the training staff applicant and executive director (or other appropriate staff) may be invited to attend an interview session.

It is anticipated that selected participants will be notified by August 27, 2018.

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*LISC's 2018 Housing Development Training Institute is possible by the generous support of:*



## PROGRAM GUIDELINES

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### PROGRAM DESCRIPTION

Since 1988, the California Local Initiatives Support Corporation (LISC) offices have sponsored eleven Affordable Housing and Community Development Training Institutes (HDTI). Over 410 people representing 100 community development organizations throughout California are graduates. LISC launched HDTI in response to an unmet educational need for a comprehensive program to develop the skills of the staff of community development corporations (CDCs). In order to meet their staffing needs, CDCs oftentimes hire someone with limited direct experience in development and provide them with on-the-job training to increase their skills and their utility to the organization. People with the required skills, often acquired through a combination of graduate school training and experience in development, are at a premium. On-the-job training often strains CDCs' small staff resources and is limited to the specifics of the project at hand. As a result, many new project managers are left with a fragmented, incomplete picture of all the elements in the development process and how to carry them out.

In response to the lack of adequate training programs, LISC's training program was launched with the first Los Angeles training program in 1988-89 followed by SF Bay Area LISC and LISC San Diego in subsequent years. In 1994, for the first time, LISC operated a statewide program for organizations from all three of the California program areas and rural areas. Since then the LISC California statewide program has typically been offered every other year with an average of 40-45 participants in each class.

Traditionally nonprofit organizations are the most responsive in undertaking a variety of projects and programs to foster the physical, economic and social revitalization of distressed communities. The skills required to develop affordable housing and economic development projects are complex and multifaceted, and the pool of professionals with extensive development experience in this field is limited. LISC's training programs represent a significant investment in the development of human capital by increasing the skills of new and new-to-development staff.

The goals of the LISC training program are:

- (1) Increase the development capacity of community-based nonprofit development organizations by providing practical, comprehensive, and intensive skill training in affordable housing development and community development strategies and techniques.
- (2) Increase the supply of affordable housing through the program's emphasis on production as part of the learning process. During the duration of the training program, each participant is expected to work on an actual housing development, applying the lessons learned during the workshop and creating a real-life context for the training.
- (3) Foster a network of project management professionals who serve as a resource to each other, share information and provide peer support throughout their careers.

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### PROGRAM COMPONENTS

The specific components of the training program include the following curriculum modules:

#### Real Estate Development

- definitions of common real estate development terms
- exploration of the key components of sound, socially responsible property and asset management
- extensive financial feasibility and analysis instruction
- housing finance - the "in's" and "out's" of public resources
- instruction on how to use computerized spreadsheets
- how to select, organize and manage a development team
- understanding and managing the development process
- identifying and accessing funds for development
- feasibility analysis
- identifying sites and obtaining site control
- syndication and equity participation issues
- resolving planning and zoning issues
- construction management
- marketing and lease-up
- introduction to property and asset management

A combination of presentations, case studies and simulations allows participants to negotiate a typical housing development deal issue with real world practitioners and draws on all of the program's skill areas outlined above. Working together in small groups, the participants are able to learn from each other and build upon skills learned during the training sessions.

One of the important features of the LISC training program is that it provides for the practical application of lessons learned in the participant's real work setting. Participants are expected to work on a housing project as part of the training program.

### PROGRAM DESIGN AND SCHEDULE

In the core two-week program, participants will receive approximately 100 hours of instruction in twelve days of training over a nine-month period. **Attendance at all sessions is mandatory.** HDTI is structured in the following manner:

#### **One (1) half-day local orientation**

*For participants and their supervisors*, includes: reviewing program requirements and goals, preparing an individual self-assessment and learning plan, and introduction to financial calculators.

*Bay Area – Date and location to be determined*

*Los Angeles - Date and location to be determined*

*San Diego - Date and location to be determined.*

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**Two (2) five-day statewide sessions**

*All statewide sessions will be held at the Kellogg West Conference Center located at Cal Poly Pomona ([www.kelloggwest.org](http://www.kelloggwest.org))*

Session 1: November 12\* to 16, 2018

Session 2: Spring 2019

**\*NOTE: Participants will be expected to arrive the Sunday evening prior. Training starts 8:00 am Monday morning.**

**Two (2) one-day local computer spreadsheet workshops -** *Dates to be determined*

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### PARTICIPANT PROFILE AND ELIGIBILITY REQUIREMENTS

In order to be eligible for program participation, organizations must meet the following criteria:

Organizations must be incorporated as a non-profit 501(c)(3) organization. Participating organizations should have a clear and ongoing commitment to housing development. The development of affordable housing must be explicitly stated in the organization's mission statement and by-laws.

The primary participants are project managers and assistant project managers, who are working on developing rental housing projects and who have one to two years of experience. In small organizations, executive directors or housing directors with half-time project management responsibilities are also potential participants. **Each participant must identify a housing development project to utilize as part of the training. All participants must be actively working on the project during the training between sessions, applying lessons learned from the workshops. Participants must be able to commit at least 20 hours per week to that project.**

The program involves extensive reading, often under time pressure in class. The participants must also have basic business math skills, and be minimally comfortable with manipulating ratios and fractions. Applicants who are concerned about these issues should talk to their local LISC office before applying.

Participants will be provided with a Hewlett Packard 10B financial calculator and assistance with learning that calculator as part of the program. Students will be expected to have a working knowledge of a spreadsheet program. Participants who are not currently comfortable with using a computer spreadsheet program are responsible for completing introductory workshops on their own before attending the spreadsheet clinics.

### PARTICIPANT EXPECTATIONS

Housing Development Project Goals - Each participant must identify a housing development project to utilize as part of the training. Each participant must work on the project between training sessions, applying lessons learned from the workshops.

Individual Training Goals - Each participant must complete an individual self-assessment and set personal training goals.

**The comprehensive nature of the Institute necessitates evening sessions. Organizations should *not* expect the participant to be available to work on their regular work assignments when they are at HDTI. Additionally, organizations are asked to keep participant disruptions to a minimum.**

In order to graduate with a LISC Housing Development Training Institute certificate, the participant must attend all sessions and demonstrate a mastery of the materials. If the participant has a compelling professional or personal reason to leave a weeklong session early, or not attend an intersession, the participant must discuss in advance with their local LISC office and obtain approval. A participant with an excused absence may be required to do make-up work as a condition of graduation. A participant who is absent from a session without previously discussing with LISC may be asked to leave the program. If a participant attends but is not making progress toward achieving minimum competencies by the end of the second

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session, the participant may be asked to leave the program or may not graduate.

In order for the participant to graduate with a LISC HDTI certificate, the organization must keep its commitment to allow the staff person both the support and time (at least 20 hours per week) to develop a project. If the organization is not making progress toward this goal by the end of the second session, the participant may be asked to leave the program. Additionally, the organization must demonstrate that it has the resources to maintain the staff position.

**PROGRAM FEE**

The overall program cost is approximately \$4,850 per participant including trainer costs, hotel accommodations (double occupancy – participants will be sharing rooms), training facilities, meals, program administration, materials and supplies. Upon acceptance, each organization is required to pay a portion of the cost on a sliding scale based on the number of units developed. Organizations are responsible for transportation to/from the training facility. The program fee has been adjusted for San Diego and Bay Area participants to reflect a travel allowance. The program fee is non-refundable.

Region	Program Fee per Participant	
	< 2,000 units	> 2,000 units
Bay Area	\$1,825	\$2,325
Los Angeles	\$2,125	\$2,625
San Diego	\$1,975	\$2,475

**The balance of the cost of HDTI is underwritten by the sponsoring LISC office - Los Angeles, San Diego, and Bay Area – through a generous grant from CIT Bank.**