

CORES Certification Application Questions (DIRECT)

| Question # | Resident Services Certification Questions | Answer Type | Attachments |
|--|---|----------------------|-------------|
| <p>When completing the certification application, unless otherwise noted, all questions refer to properties where the organization provides resident service coordination and has resident service staff. It does not imply that the organization's entire portfolio needs to have these services. Please answer the questions as it relates to the properties where these services and coordination are in place.</p> <p>Note: All threshold questions are highlighted in green.</p> <p>PLEASE NOTE: Many of the questions throughout this application provide a text box for the applicant to provide an answer. These text boxes have a maximum word limit of 1000 words. There is NO word minimum required for these answers. However, the applicant should use their best judgement to provide succinct answers that also provide reviewers with enough information and context to clearly and fully answer the question(s).</p> | | | |
| <p>A. Portfolio Profile</p> | | | |
| #1 | <p>Select the appropriate Resident Services Coordination Model for your organization.</p> <p>*Direct Resident Services Coordination -- Affordable housing organizations that have direct responsibility for the management, delivery, and implementation of Resident Service Coordination at their own properties. Organizations are not required to provide resident services coordination at all their properties, but must provide services in at least a portion of their properties.</p> <p>*Hybrid Resident Services Coordination – Affordable housing organizations that contract with an un-related third party entity (either property management company or another services organization) to hire the property-based resident services coordinators/staffing, but the housing owner/organization retains leadership, management, and support capacity for resident services coordination at their properties.</p> | | |
| <p>B. Resident Services Coordination</p> | | | |
| <p>Resident Services Coordination -- Refers to all functions tied to the organizational mission to implement resident services, including corporate and site-based staff, funding, technology systems, services and programs, research and evaluation, organizational knowledge and tools necessary to support resident services.</p> | | | |
| 2 | <p>How long has the organization been providing resident services coordination (consistent with this definition) for Senior/Family/Supportive properties?</p> <p><i>Select One for each housing type [[Less than a year; 1-2 years; 3-5 years; 5 or more years]]</i></p> | Drop Down-Select One | |
| 3 | <p>Please upload an Organizational Chart. This should show who is responsible at the Corporate, Regional, and Property levels for resident services coordination. The chart should list staff positions by title (staff names may be included if you wish, but are not required) and outline the relationships between staff. In addition to showing your resident services staffing infrastructure, the chart(s) should demonstrate where the resident services function sits in the larger organization. Note: It is fine to submit multiple charts to demonstrate this.</p> | UPLOAD | Org. Chart |
| 4 | <p>Please describe the organization's overall approach to resident services coordination including how property level, regional, and corporate level staff support resident services? (An executive summary). Please note: reviewers will view this in conjunction with the property profile. If further detail is needed, please provide details in your response.</p> | Text Box | |
| 5 | <p>How does the organization determine the level of staffing for resident services? How does this look different in senior properties? Family properties? Supportive services properties? What is the minimum standard for each type of property for staffing ratios? In how many properties, for which there is currently service coordination, does the organization not meet the desired minimum standard?</p> | Text Box | |
| 6 | <p>Please provide specific examples of strategies used by Property Management and Resident Services staff to foster effective collaboration. In a typical property, how frequently (weekly, bi weekly, monthly, quarterly, ,etc.) Does property management and resident services staff meet at the property level? AND how often does property based staff meet with regional/corporate level resident services staff?</p> | Text Box | |

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| 7 | <p>Does the organization have a protocol or strategy for how to resolve conflicts that may arise from differences in the goals of property management and resident services?</p> <p>If YES: Please describe the organization's protocol or strategy? This could include training, communication and management protocols, team building, and other systems.</p> | <p>Drop Down- Y/N</p> <p>Text Box</p> | |
| 8 | <p>If the organization has smaller properties in their portfolio (e.g. fewer than 30 units) where they provide resident services, what strategies are utilized? If the strategies differ between Senior and Family buildings please provide examples from each. <i>For example, the organization may do this with technology, part time staff, or some other form of shared resources.</i></p> | Text Box | |
| 9 | <p>How does the organization continue to improve its capacity to innovate, identify and implement best practices in its own resident services coordination work? (e.g. trainings, industry memberships and peer exchanges, external evaluation etc.)</p> | Text Box | |
| 10 | <p>How is information that is collected from tenants stored? Check All that Apply for methods for storing tenant data.</p> <p>[[Hard Copy -- Filing Cabinet; Scanned Documents saved to a hard drive; Scanned Documents saved to a hard drive and is backed up regularly, Scanned Documents saved to a local Server; Scanned Documents store on a Cloud-based system; Direct entry of tenant data into a cloud based system (i.e. from a computer or a mobile device), Property Management Software; Program/Service Outcomes Tracking Software; OTHER]]</p> | <p>Drop Down- Select All</p> <p>Text Box (for OTHER)</p> | |
| 11 | <p>Does the organization have privacy protocols for storing and accessing tenant information?</p> <p>If Yes: Please upload these protocols.</p> | <p>Drop Down - Y/N</p> <p>UPLOAD</p> | <p>Privacy Protocols</p> |
| 12 | <p>Is the organization's staff trained on the privacy protocols?</p> | Drop Down - Y/N | |
| <p>Resident Services Coordinators (RSC) -- The staff person at a property responsible for implementing programs/services with partners</p> | | | |
| 13 | <p>When the organization provides resident services coordination and on-site resident services staff at a property, describe how the organization views the role of resident service coordinator. What are their typical roles and responsibilities?</p> <p>Please upload a job description/scope of work which outlines this.</p> | UPLOAD | Job Description |
| 14 | <p>When hiring new resident services staff, does the organization seek candidates with a minimum level of education, training, or experience?</p> <p>If YES: What education, certifications, or experience does the organization seek when hiring new Resident Services coordinators? Please be specific. Are there different requirements or preferences when hiring staff for different types of properties (i.e. family/ senior/ supportive)? If so, please explain these different requirements.</p> | <p>Drop Down- Y/N</p> <p>Text Box</p> | |

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| 15 | What kind of training does the organization provide (either directly or through partners) for its resident services staff at the corporate/regional and property levels once they are hired? Please be specific. Are there differences for staff working with different types of properties (senior/Family/Supportive)? | Text Box | |
| 16 | What metrics does the organization use to measure success of the resident service coordinator on their roles and responsibilities? How are these metrics shared with the Resident Services Coordinator? Are the metrics used in the annual performance review process? | Text Box | |
| Resident Services Systems | | | |
| 17 | Are there technologies, resources, systems, and or tools that are used for resident services coordination consistently across the portfolio and organization? (e.g. technology platforms, robust peer support network across the portfolio, resource guides etc.) <i>Please note that data collection tools will be address later in the application.</i> | Drop Down- Y/N | |
| | If YES: Please briefly describe the technologies, resources, systems, and or tools that have been scaled to use across multiple properties (more than three properties) in your portfolio. How are they used? Who has access to and uses these resources and tools? | Text Box | |
| 18 | How does the organization ensure residents continue to be served when there is an unexpected departure of a resident services coordinator (e.g. new job, unexpected medical leave, or job abandonment)? Are there systems and protocols in place that assist in this situation? | Text Box | |
| 19 | Does the organization have a framework of goals with strategies for resident outcomes, a theory of change, or a logic model that guides how resident services coordination is implemented across the portfolio ? | Drop Down- Y/N | Goals/ Theory of Change |
| | If Yes: Please upload the framework of goals/theory of change/logic model for Resident Services Coordination at the organization. | UPLOAD | |
| | If NO: If the organization does not have a framework of goals, a theory of change, or a logic model, then how does the organization decide what the organizational level goals and outcomes are? | Text Box | |
| C. Utilizing Information about Residents & the Community | | | |
| Larger Community/Neighborhood Assessment | | | |
| 20 | Does the organization use information/data from the surrounding community to help inform a community scan and/or resident opportunities & priorities assessment ? (i.e. census data, data from local schools, EMS data, Medicaid/Medicare data, public health data, Enterprise's Opportunity 360 report) | Drop Down - Y/N | |
| | If Yes: Please give at least two examples of localized data used (i.e. census data, data from local schools, EMS data, Medicaid/Medicare data, public health data, Enterprise's Opportunity 360 report) | Text Box | |
| | If Yes: How often does the organization access or collect this community level information? | Text Box | |
| 21 | Does the organization utilize or complete a recent community scan (This includes (1) local data to give insights about the surrounding neighborhood/community, (2) a review (identification of) and (3) assessment (analysis of the quality) of existing local amenities, services, community assets, potential partners and other resources in the larger community) prior to delivery of services and programs? | Drop Down - Y/N | Community Scan |
| | If Yes: Please upload an example of a completed report or summary of a community scan. <i>If you serve family and seniors properties please choose one example to upload. If you have only provided services in a supportive housing property then please upload an example from that.</i> | UPLOAD | |

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| | <p>If No: If the organization does not complete or utilize a community scan, why not? How does the organization retain knowledge of and assess existing resources in the community? Does the organization include community level data to inform a property services plan? If so, what data is used?</p> | Text Box | |
| 22 | Typically, does the organization utilize a community scan that is updated at least once every five years? | Drop Down - Y/N | |
| Resident Data | | | |
| 23 | <p>Does the organization conduct a resident opportunities & priorities assessment and produce an analysis/report at the property level prior to initial delivery of services and programs or shortly after lease up?</p> <p><i>This assessment should include (1) analysis of the aggregated demographics/data available for the residents of the property, (2) direct feedback (for example in the form of interview, surveys, focus groups etc.) from the residents, (3) explanation of how the information in the assessment was obtained, and (4) an analysis showing what was learned. This assessment should be updated at least once every three years.</i></p> | Drop Down- Y/N | Resident Opportunities & Priorities Assessment Report |
| | <p>If No: If the organization does not complete a resident opportunities and priorities assessment, why not? Does the organization include aggregated information/data about the residents of a property to inform a property services plan? If so, what data is included?</p> | | |
| | <p>If Yes: Please upload a specific property level example of a completed Resident Opportunities & Priorities Assessment Report.</p> <p><i>Note: This Resident Opportunities & Priorities Assessment should be for the same property for which you provided community scan and any other property-specific attachments. If you serve family and seniors properties please choose one example to upload. If you have only provided services in a supportive housing property then please upload an example from that.</i></p> | UPLOAD | |
| | <p>If YES: Typically, does the organization collect information on Resident Opportunities and Priorities Assessments at a property at least once every three years?</p> | Drop Down- Y/N | |
| 24 | DATA Question -- See "Data Question Tab" | UPLOAD | Data Question Upload |
| | | | |
| D. Resident Services Program Plan | | | |
| Program Implementation | | | |

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| 25 | <p>Provide a property services plan from one property that has already been implemented. Property Services Plans should be updated at least once every three years and should include (1) the desired goals, (2) a description of the resident services program, (3) strategies to address language, cultural or other potential challenges when engaging residents (4) who provides the services (for example: organizational staff, third party resident service provider, partner organizations, online/virtual resources, etc.), (5) staffing model and partnership description (if applicable), and (6) budget. The plan should show how the information from the community scan and resident opportunities and needs assessment were used/analyzed to create the plan. A budget can be included as an attachment within this upload.</p> <p><i>Note: This Property Services Plan should be for the same property for which you provided community scan and Resident Opportunities and Priorities Assessment Report. If you serve family and seniors properties please choose one example to upload. If you have only provided services in a supportive housing property then please upload an example from that.</i></p> | UPLOAD | Property Services Plan |
| 26 | Typically, does the organization update or assess property services plans at least once every three years? How are surveys/data used in this re-assessment? | Text Box | |
| 27 | Does the organization provide referrals as part of your service coordination? | Drop Down- Y/N | |
| 28 | <p>Does the organization provide training or technical assistance to resident service coordinators on how to ensure quality, integrity, and consistency in providing and tracking referrals?</p> <p><i>If YES: please describe what kind of guidance and/or oversight is given to ensure quality, integrity, and consistency in providing and tracking referrals.</i></p> | Drop Down- Y/N | |
| 29 | <p>Please indicate across your portfolio which categories of services are provided. These services may be provided by the organization's staff or by a partner providing a specific program (such as a health clinic providing blood pressure screenings). <i>Select all that apply.</i></p> <p><i>[[Housing Stability Support; Health and Wellness; Nutrition/Healthy Food Access; Mental/Behavioral Health; Asset Building; Financial Management and Budgeting; Workforce Development; Adult Education Support; Youth Education Support; Youth Programming; Social Cohesion/Reduction of Isolation; Community Engagement; Referrals; Other (please specify)]]</i></p> <p>If the organization only provides services in one category, please provide a description of how extensive these services are.</p> | Drop Down/ Select All Text Box (for other) | |
| 30 | <p>Please provide a brief description of programs/services that have been scaled and are offered in more than one of your properties in any one category. (i.e. a tutoring program or healthy living initiative that your run at multiple sites)</p> <p><i>This should be no more than a 3-4 sentence description for each program.</i></p> | Text Box | |
| Partnerships | | | |
| 31 | Does the organization work with outside service providers? (This refers to a partner that comes to a property to provide a program/service (such as a YMCA providing a series of health workshops), not a third party resident services coordination partner who is responsible for the delivery of all resident services coordination at a property). | Drop Down- Y/N | |
| | <i>If NO: Please explain why the organization does not work with outside service providers.</i> | Text Box | |
| 32 | <i>If YES to #31: Are there formalized agreements (MOUs or contracts) either at the portfolio or property level between your organization and external organizations?</i> | Drop Down- Y/N | |
| 33 | <p><i>If YES to #32: In the formalized agreements, please indicate if the agreements include the following. Select all that Apply.</i></p> <p><i>[[(1) Roles + Responsibilities; (2) Participation; (3) Goals; (4) Outcome/impact goals; (5) Addresses liability.]]</i></p> | Drop Down/ Select All | MOU |

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| | Please upload an example of an executed MOU between your organization and an external organization which outlines a partnership to deliver services to one or more of your properties. <i>Note: You may redact identifying information if necessary.</i> | UPLOAD | |
| 34 | What is the organization's process for assessing a potential partner, their approach towards service provision and their quality of services? <i>(For example, looking for partners who, when possible, use evidence based services)</i> What is the involvement of property level service coordination and what is the involvement of regional or corporate management in vetting potential partners? | Text Box | |
| Resident Engagement/Participation | | | |
| 35 | What approaches does the organization utilize to build trust with residents or facilitate stronger cohesion between residents? | Text Box | |
| 36 | Typically, what approaches and strategies does the organization use to recruit residents to participate in programs/services? (Flyers, calendars, social media, personal outreach, collaboration between PM/RS and other property staff to reach new residents, recruit for new programs from participants in existing programs, resident leaders, other (please specify)) | Drop Down/ Select All Text Box (for other) | |
| | What approaches are the most successful? | Text Box | |
| 37 | In situations where there is low participation in a resident service program/activity, how does the organization analyze why there is low participation and respond? Give a specific example of a strategy used at a property to address low participation. Provide context on the type of property (for example: large family property in very low income community or senior LIHTC property in high resource area). | Text Box | |
| 38 | Does the organization collect any information from residents to shape/adjust program design or to assess the impacts of services/programs? If YES: How is it collected? <i>Select all that Apply.</i> [[Survey; Focus Group; Meetings with Residents; Walk in Office Hours, Information from Partner Orgs; Other (please specify)]] | Drop Down- Y/N Drop Down/ Select All Text Box (for Other) | |
| E. Funding & Sustainability of Resident Services | | | |
| | Historically how does the organization typically fund Resident Services Coordination at the corporate/regional level? [[Property Operations; Residual Receipts; Reserve set up through development of the property to be used for RS; Federal Gov't Funds; State Gov't Funds; Local Gov't Funds; Non-Gov't Grants; Donations; Org. Contribution from Retained Earnings; Senior Housing-202 Grant; Senior Housing- 202 Adjustment in budget based rent; In Kind Donations; Volunteer Time; Partnerships (partner funded services) Other -Please Specify.]] | Drop Down/ Select All | |
| | What are the two largest sources of funding for Resident Services Coordination at the corporate/regional level? | Text Box | |
| 39 | Historically how does the organization typically fund the Resident Services Coordinator at the property level? [[Property Operations; Residual Receipts; Reserve set up through development of the property to be used for RS; Federal Gov't Funds; State Gov't Funds; Local Gov't Funds; Non-Gov't Grants; Donations; Org. Contribution from Retained Earnings; Senior Housing-202 Grant; Senior Housing-202 Adjustment in budget based rent; In Kind Donations; Volunteer Time; Partnerships (partner funded services) Other -Please Specify.]] | Drop Down/ Select All | |
| | What are the two largest sources of funding for the Resident Services Coordinator at the property level? | Text Box | |

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| | <p>Historically how does the organization typically fund Resident Services (the actual program and services provided for residents) at the property level?</p> <p><i>[[Property Operations; Residual Receipts; Reserve set up through development of the property to be used for RS; Federal Gov't Funds; State Gov't Funds; Local Gov't Funds; Non-Gov't Grants; Donations; Org. Contribution from Retained Earnings; Senior Housing-202 Grant; Senior Housing-202 Adjustment in budget based rent; In Kind Donations; Volunteer Time; Partnerships (partner funded services) Other -Please Specify.]]</i></p> | Drop Down/ Select All | |
| | <p>What are the two largest sources of funding for Resident Services at the property level?</p> | Text Box | |
| 40 | <p>Historically, if the organization has committed to providing resident services coordination in a specific property, does the organization commit to having several years of funding available to pay for resident services coordination in that property? How has the organization mitigated the potential risk of losing significant sources of funding for resident service coordination?</p> | Text Box | |
| 41 | <p>Typically, if the organization does not have enough resources to cover the resident services plan how does the organization proceed? Please provide an example of how this was addressed at a property.</p> | Text Box | |
| 42 | <p>In addition to any fundraising that happens at the property level, does the organization have dedicated resources/staffing to seek additional resource development or capacity-building for Resident Services at the organization/corporate level?</p> | Drop Down- Y/N | |
| | <p>If NO: How does the organization raise the additional funds, resources, or capacity needed?</p> | Text Box | |
| | <p>If YES: Please describe the roles and responsibilities of those staff.</p> | Text Box | |
| | <p>F. Evaluation of Resident Services Efforts</p> | | |
| 43 | <p>At the property level, does the organization track and analyze indicators related to its resident services efforts?</p> | Drop Down- Y/N | Resident Indicators and Analysis Report (Single Property) |
| | <p>If YES: Please upload a Resident Indicators and Analysis Report from a property which demonstrates this analysis . This report should provide the organization with the information necessary for analysis on the value and/or impact of the services on residents and to determine if the services should continue or if they need to be altered in order to attain the desired goals.</p> <p>Note: The report should be for the same property as the uploaded community scan, resident opportunities & priorities assessment report, and program plan.</p> | UPLOAD | |
| 44 | <p>How frequently is the Resident Indicators and Analysis Report produced and reviewed? Select one.</p> <p><i>[Quarterly, Semi-annually, Annually, Every two years, Less frequently then every two years]</i></p> | Drop Down - Select One | |
| 45 | <p>What tools does the organization use to collect and track resident indicators/outcomes/impact? <i>Select all that Apply.</i></p> <p><i>[[ETO/Social Solutions; Family Metrics; AASCOOnline; Salesforce; Service Point; Integrate; Success Measures; Proctor Software; Excel; Property Management Software; Other (Please Specify)]]</i></p> | Drop Down/ Select All Text Box (for other) | |
| 46 | <p>Are residents involved and engaged in assessing the success of the services?</p> | Drop Down- Y/N | |
| | <p>If YES: Please describe how residents are involved (this may include resident survey information about the experience using the program/service, focus groups, and/or analysis of low participation rates) and include one specific property level example in your description.</p> | Text Box | |
| 47 | <p>Please upload an analysis/report which demonstrates the value/impact of the organization's services across <u>multiple properties</u>.</p> <p><i>This could be demonstrated by featuring the value/impact of a specific service (i.e. a report for a tutoring program or financial coaching program offered at multiple sites) or an impact report on broader resident services efforts across multiple properties.</i></p> | UPLOAD | Impact Analysis/Report (multiple properties) |
| | | | |

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| 48 | To the best of my knowledge, I certify that I have answered all the questions in this application accurately and this application is consistent with the answers provided in the Pre-Screening previously submitted. | Drop Down Y/N | |
| 49 | Executive or principal sign-off | UPLOAD | |
| 50 | SAHF is able to share all data and uploaded information from certification application with Fannie Mae. | Drop Down Y/N | |

Section A: Portfolio Profile -- To be filled out by Owners who provide/manage their own Resident Services Coordination (Direct)

How many years of experience has the organization had as a multifamily housing provider?

Portfolio Information

| Property Type | # of Properties: | # of Units | Property Mgmt.: # Properties that Self-Manage or have a Related Property Mgmt. company | Property Mgmt.: # Properties with Third-party Property Mgmt. | RSC: # Properties with Resident Services Coordination | RSC: # of years the organization has been providing Resident Services Coordination in this type of housing | RSC: # of Properties with on-site Resident Services Coordinator(s) (PT or FT) | RSC: # Properties with a community space for Resident Services |
|--------------------------------|------------------|------------|---|---|--|---|--|---|
| Senior | | | | | | | | |
| Family/Unrestricted | | | | | | | | |
| Supportive/Special Populations | | | | | | | | |
| Other | | | | | | | | |

If possible, please estimate what percentage of the organization's portfolio you would describe as rural?

#24

| What information and data from residents is typically utilized as a part of resident services coordination? <i>Select All That Apply.</i> | | | | | |
|---|--|---|--|--------------------------------------|---|
| | Collected by property management, but NOT shared with RS staff | Collected and Shared with RS Staff (AGGREGATED) | Collected and Shared with RS Staff (INDIVIDUALIZED DATA) | Collected by Resident Services Staff | Please indicate if this data is stored electronically |
| Demographics <i>Age</i> <i>Sex</i> <i>Race/Ethnicity</i> <i>Income</i> <i>Employment</i> <i>Non Work Income (disability, SS, pension, other)</i> <i>% income paid to rent</i> <i>Banking Info</i> <i>Other - Please specify</i> | | | | | |
| Compliance Data <i>Eviction/Notice to Quit</i> <i>Late Rent Payment</i> <i>Change in Income/Employment</i> <i>Move In/Move out</i> <i>Other- Please Specify:</i> | | | | | |
| Resident Surveys | | | | | |
| Individual Assessments (<i>intake forms, one-on-one individualized assessments</i>) | | | | | |
| Focus Group Information | | | | | |
| Other?? | | | | | |