

CORES Recertification Application Questions - Third Party Model

Question #	Resident Services Certification Questions	Answer Type	Attachments
	<p>When completing the re-certification application, unless otherwise noted, all questions refer to properties where the organization provides <u>third party</u> resident service coordination with management and programmatic oversight and systems along with onsite resident service staff. Please answer the questions as it relates to 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>		
A. Portfolio Profile			
	ORGANIZATION NAME	Text Box	
1A	<p>Third Party Resident Services Coordination - An affordable housing organization or social service organization that is contracted by affordable housing organizations/owners to provide all functions (management, delivery, and implementation) of resident services coordination at a property.</p> <p><i>Please download the Third Party Portfolio Profile Form, fill it out, and upload it below.</i></p>	UPLOAD	Portfolio Profile
1B	<p>Please describe any significant changes in your organization's portfolio over the last five years (since you were last certified), including any significant changes to your resident services across your portfolio. Has your organization grown in terms of the number of properties where you provide resident services? A reduction in the number of properties where you provide services? A strategic decision to focus on certain geographies, populations, or property types? If there have not been any significant changes to the portfolio or resident services commitments, please reflect on why your organization has not had any change.</p>	Text Box	
B. Resident Services Coordination			
<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 does providing third party resident services coordination fit in with the organization's broader goals and mission? Why does the organization do this work?</p>	Text Box	
3A	<p>How does the organization (as a third party resident services provider) ensure that the organization's goals or logic model align with an owner's goals for resident services coordination and implementation? What does the organization do if there is misalignment between an owner's goals and the organization's? Please provide an example of a instance in which the organization may have decided not to work with an owner and how the organization came to that decision.</p>	Text Box	

CORES Recertification Application Questions - Third Party Model

Question #	Resident Services Certification Questions	Answer Type	Attachments
7	<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 also describe the reporting relationship between the third party organization and owners.</p> <p>Please note: Reviewers will view this in conjunction with the property profile and organizational chart. If further detail is needed, please provide details in your response. This should also describe any role that property management staff has in supporting resident services outreach and delivery, if property management staff are a core part of the resident services delivery model.</p>	Text Box	
8	<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? If this formula or model has changed over the last five years, what prompted those changes?</p> <p>Please note: If resident services staff also have property management duties, please describe if and how this is taken into consideration when determining the level of staffing</p>	Text Box	
9	<p>In a typical property, how frequently does property management and resident services staff meet at the property-level (weekly, biweekly, monthly, quarterly etc.)? How often does property-based staff meet with regional/corporate level resident services staff? Are these expectations codified in operating protocols or in a contract with the owner?</p> <p>Please also provide two examples of strategies used by Property Management and Resident Services staff to foster effective collaboration. Other examples of how you foster collaboration may be provided.</p> <p>NOTE: If there have been no changes to the strategies or protocols used in the last five years - please indicate at the beginning of your response that no changes have been made.</p>	Text Box	
10A	<p>Does the organization (as a third party resident services provider) have protocol(s) or strategies for how to resolve conflicts that may arise from differences in the roles of property management and resident services?</p>	Drop Down- Y/N	
10B	<p>If YES: Please describe the organization's protocol or strategy. How has this strategy changed over the last 5 years in response to the organization's growth and experience? This could include training, communication and management protocols, team building, language in a contract or operating procedures, escalation to the owner, and/or other systems.</p> <p>NOTE: If there have been no changes to methods of improving capacity to innovate and implement best practices in the last five years - please indicate at the beginning of your response that no changes have been made.</p>	Text Box	

CORES Recertification Application Questions - Third Party Model

Question #	Resident Services Certification Questions	Answer Type	Attachments
11	<p>Does the organization provide any resident services support/services virtually? If so, what services are provided virtually? How does the organization decide which services could be provided virtually? What factors/and or strategies does the organization consider to promote the efficacy of virtual services?</p> <p>NOTE: If the organization does not provide services virtually, please indicate that in your response.</p>	Text Box	
12	<p>How does the organization (as a third party resident services provider) 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> <p>NOTE: If there have been no changes to methods of improving capacity to innovate and implement best practices in the last five years - please indicate at the beginning of your response that no changes have been made.</p>	Text Box	
13	<p>Does the organization (as a third party resident services provider) use a consistent online database system for storing resident data across owners?</p> <p>IF YES: What system is used? Check All that Apply.</p> <p>Social Solutions (ETO/Apricot); Power BI; Family Metrics; AASOnline; Salesforce; Service Point; Integratec; Success Measures; Proctor Software; Excel; HMIS; Property Management Software; Other (Please Specify)</p>	<p>Drop Down - Y/N</p> <p>Drop Down-Select All</p> <p>Text Box (for OTHER)</p>	
<p>Resident Services Coordinators (RSC) -- The staff person at a property responsible for implementing programs/services with partners and residents. 📄</p>			
14	<p>When the organization provides resident services coordination onsite at a property (as a third party resident services provider), describe how the organization views the role of this staff member. What are their typical roles and responsibilities?</p> <p>Please upload an example of the job description/scope of work which outlines this role and is currently being used.</p>	UPLOAD	Job Description
15A	<p>What education, certifications, and/or experience does the organization seek when hiring new Resident Services coordinators? Please be specific (including area(s) of study/experience if applicable). Are there different requirements or preferences when hiring staff for different types of properties (i.e. family/ senior/ supportive) or working with different populations? If so, please explain these different requirements.</p>	Text Box	
15B	<p>How have the roles and responsibilities and minimum qualifications you seek in Resident Services staff evolved in the last five years?</p> <p>NOTE: If there have been no changes to roles/responsibilities or minimum qualifications in the last five years - please indicate at the beginning of your response that no changes have been made.</p>	Text Box	
16	<p>Has the organization created leadership opportunities (i.e., a resident ambassador program, resident council, board positions, etc.) and/or employment opportunities (i.e., internships, positions within the org., etc.) for residents? What strategies does the organization have to recruit and/or prepare residents for those positions? Are these positions paid or unpaid?</p>	Text Box	

CORES Recertification Application Questions - Third Party Model

Question #	Resident Services Certification Questions	Answer Type	Attachments
17A	What kind of training does the organization provide (either directly or through contractors and partners) or mandate 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	
17B	Have there been any changes to the types of trainings provided to staff or additional trainings your organization has added for staff in the last five years? If there have been no changes, please indicate at the beginning of your response that no changes have been made.	Text Box	
18	What kind of ongoing training or reflective learning does the organization sponsor for its staff on Diversity, Equity, and Inclusion (e.g.. Racial Justice, Anti-racist Education)?	Text Box	
19	How do resident services coordinators set annual goals for their work and the property? How is progress on meeting these goals reviewed through the year?	Text Box	
Resident Services Systems			
20A	Are there technologies, resources, systems, and or tools that are used for resident services coordination consistently across different property contracts/owners where the organization provides third party resident services? (e.g. <i>technology platforms, communication platforms, robust peer support network across the portfolio, resource guides etc.</i>) Please Note: Data collection tools will be addressed later in the application.	Drop Down- Y/N	
20B	If YES: Please provide at least two examples of technologies, resources, systems, and/or tools that have been scaled to use across multiple property contracts (more than three properties). For each example, please indicate the scale at which these are implemented (across how many properties and how many owners?). How have these technologies, resources, systems, and/or tools changed over the past 5 years? If they have not changed, please describe how the systems continue to meet current needs. If a new system/tool was listed as a pilot or a planned initiative in your last CORES application, please provide an update on the implementation.	Text Box	
21A	Does the organization (as a third party resident services provider) have its own 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	
21B	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	
21B	If Yes: Please upload the framework of goals/theory of change/logic model for Resident Services Coordination.	UPLOAD	Goals/ Theory of Change

C. Utilizing Information about Residents & the Community			
Larger Community/Neighborhood Assessment			
22A	Does the organization or owner use information/data from the surrounding community to help inform a community scan and/or resident opportunities & priorities assessment ? (i.e. <i>census data, data from local schools, EMS data, Medicaid/Medicare data, public health data, and/or other community level data index reports</i>)	Drop Down - Y/N	

CORES Recertification Application Questions - Third Party Model

Question #	Resident Services Certification Questions	Answer Type	Attachments
22B	If Yes: Please give at least two examples of localized data used (<i>i.e. census data, data from local schools, EMS data, Medicaid/Medicare data, public health data, and/or other community level data index reports</i>) and articulate how the data is used.	Text Box	
22C	If Yes: Who is responsible for accessing and collecting this community level information? [[Corporate/Organizational Staff; Regional Resident Services Staff; Onsite Resident Services Staff; Property Management; Owner Staff, OTHER]]	Drop Down/ Select All Text Box (for other)	
22D	If Yes: How often does the organization or owner access or collect this community level information?	Text Box	
23A	Does the organization or owner utilize or complete a recent community scan prior to the delivery of services and programs? A community scan includes (1) local data to give insights, (2) identification of existing local amenities, services, community assets, potential partners and other resources in the larger community, and (3) assessment of the quality of these existing local services and resources.	Drop Down - Y/N	
23B	If NO: If the organization or owner 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 or its third party contractor include community level data to inform a property services plan? If so, what data is used?	Text Box	
23B	<p>If Yes: Please upload two examples of a completed report or summary of a community scan. The first one should be for the same property featured in your last CORES application. The second Community Scan should be for an additional property in your portfolio.</p> <p>Community Scans should be updated at least once every six years.</p> <p>As a reminder, you will be asked to provide additional documents (Resident Opportunities & Priorities Assessments, Property Service Plans, Resident Indicators & Analysis Reports) for these same two properties throughout the rest of the application.</p> <p>NOTE: If your organization no longer provides resident services at the property featured in your original CORES application, please contact CORES staff before proceeding.</p> <p>Community Scan - Property example 1 This Community Scan should be for the same property featured in your last CORES application.</p> <p>Community Scan - Property example 2 This second Community Scan should be for an additional property in your portfolio.</p>	Upload #1	Community Scan Property example 1
		Upload #2	Community Scan Property example 2
23C	IF YES: Typically, does the organization utilize a community scan that is updated at least once every six years?	Drop Down - Y/N	

CORES Recertification Application Questions - Third Party Model

Question #	Resident Services Certification Questions	Answer Type	Attachments
23D	<p>If YES: Who is responsible for completing this community scan?</p> <p>[[Corporate/Organizational Staff; Regional Resident Services Staff; Onsite Resident Services Staff; Property Management; Owner Staff, OTHER]]</p>	<p>Drop Down/ Select All</p> <p>Text Box (for other)</p>	
Resident Data			
24A	<p>Does the organization or owner 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 interviews, 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 assessments should be updated at least once every three years.</i></p>	Drop Down- Y/N	
24B	<p>If No: If the organization or owner does not complete a resident opportunities and priorities assessment, why not? Does the organization or owner include aggregated information/data about the residents of a property to inform a property services plan? If so, what data is included?</p>	Text Box	
24B	<p>If Yes: Please upload two specific property level examples of a completed Resident Opportunities & Priorities Assessment Report. <i>These assessments should be updated at least once every three years.</i></p> <p>Note: This Resident Opportunities & Priorities Assessments should be for the same properties for which you provided community scans and any other property-specific attachments.</p> <p>Resident Opportunities & Priorities Assessment Report - Property example 1 This Resident Opportunities & Priorities Assessment should be for the same property featured in your last CORES application.</p>	<p>UPLOAD #1</p>	<p>ROPA Property Example 1</p>
	<p>Resident Opportunities & Priorities Assessment Report - Property example 2 This second Resident Opportunities & Priorities Assessment should be for an additional property in your portfolio.</p>	<p>UPLOAD #2</p>	<p>ROPA Property Example 2</p>
24C	<p>If YES: Typically, does the organization or owner collect information on Resident Opportunities and Priorities Assessments at a property at least once every three years?</p>	Drop Down- Y/N	
24D	<p>If YES: Who is responsible for completing this Resident Opportunities & Priorities Assessment and producing an analysis/report?</p> <p>[[Corporate/Organizational Staff; Regional Resident Services Staff; Onsite Resident Services Staff; Property Management; Owner Staff, OTHER]]</p>	<p>Drop Down/ Select All</p> <p>Text Box (for other)</p>	

CORES Recertification Application Questions - Third Party Model

Question #	Resident Services Certification Questions	Answer Type	Attachments
25	DATA Question -- See "Data Question Tab" Please download the Data Question Chart, fill it out, and upload it below.	UPLOAD	Data Question Chart

D. Resident Services Program Plan			
Program Implementation			
26A	<p>Provide property services plans from two properties that have 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 plans should show how the information from the community scan and resident opportunities and priorities assessment were used/analyzed to create the plan. A budget can be included as an attachment within this upload.</p> <p>Note: This Property Services Plans should be for the same properties for which you provided Community Scans and Resident Opportunities and Priorities Assessments.</p> <p>Property Services Plan - Property example 1 This Property Services Plan should be for the same property featured in your last CORES application.</p> <p>Property Services Plan - Property example 2 This second Property Services Plan should be for an additional property in your portfolio.</p>	<p>UPLOAD #1</p>	<p>Property Services Plan Property Example 1</p>
		<p>UPLOAD #2</p>	<p>Property Services Plan Property Example 2</p>
26B	<p>Who is responsible for completing this Property Services Plan?</p> <p>[[Corporate/Organizational Staff; Regional Resident Services Staff; Onsite Resident Services Staff; Property Management; Owner Staff, OTHER]]</p>	<p>Drop Down/ Select All</p> <p>Text Box (for other)</p>	
26C	Typically, does the organization (as a third party resident services provider) or the owner update or assess property services plans at least once every three years?	Drop Down- Y/N	
27	How are surveys, data, and direct feedback from residents used to update the property service plan?	Text Box	

CORES Recertification Application Questions - Third Party Model

Question #	Resident Services Certification Questions	Answer Type	Attachments
28A	Does a staff person from the owner review the community scan, resident opportunities and priorities assessments, and/or the property plan?	Drop Down- Y/N	
28B	If YES: Please describe the review process, what approvals may be required to implement a property services plan, what is evaluated, and what happens if one of the plans does not meet expectations.	Text Box	
28C	IF YES: How has this process changed in the past 5 years? NOTE: If there have been no changes to the review process for property services plans in the last five years - please indicate at the beginning of your response that no changes have been made.	Text Box	
29	In the initial CORES application, the organization identified several programs that had been scaled across multiple properties. What new programs has the organization scaled within the past five years? Please provide a brief description of the programs/services. Max two examples. This should be no more than a 4-5 sentence description for each program.	Text Box	
Partnerships			
30	Often properties with resident services coordination engage with external partners to bring services and/or programs on site (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). As a third party resident services provider, what is the organization's process for assessing a potential external service partner, their approach towards service provision and their quality of services? What is the involvement of property level service coordinators, regional or corporate management, and the owner in vetting potential partners?	Text Box	
31A	When there are external service partners, do you use MOUs or formalized written agreements?	Drop Down- Y/N	
31B	If YES to 27A: Please upload an example of an executed MOU or formalized written agreement between your organization and an external organization which outlines a partnership to deliver services to one or more of your properties. This example document should be recent - executed within the last three years. Note: You may redact identifying information if necessary between your organization and external organizations.	UPLOAD	MOU
31C	If yes: In the formalized agreements, please indicate if the agreements include the following. <i>Select all that Apply.</i> [[{(1)Roles & Responsibilities; (2)Participation targets/expectations; (3)Goals; (4)Outcome/impact goals;(5) Insurance & liability; (6)data sharing (if applicable)]]	Drop Down/ Select All	
Resident Engagement/Participation			

CORES Recertification Application Questions - Third Party Model

Question #	Resident Services Certification Questions	Answer Type	Attachments
32	What approaches does the organization utilize to build trust with residents or facilitate stronger cohesion between residents? Please share two examples of how RSCs have built trust and social cohesion in a community.	Text Box	
33	In situations where there is low participation in a resident service program/activity, how does the organization (as a third party resident services provider) analyze why there is low participation and respond? Give a specific example of a strategy used at a property to address low participation including how the organization got resident input. 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	

E. Funding & Sustainability of Resident Services			
34	What is the typical duration of a contract with an owner to provide third party resident services coordination? Drop Down: Monthly; Quarterly; 1 year; 2 years; 3 or more years	Drop Down- Select One	
35A	In situations where the budget provided by the owner may not cover the cost of providing the quality of programming that the organization holds as a standard, does the third party support/work with an owner to leverage existing resources and owner contributions to add additional services or enhancements beyond what the owner can initially contribute?	Drop Down- Y/N	
35B	If YES: How does the organization (as a third party resident services provider) support/work with the owner to make sure that the organization's standards for resident services coordination can be supported financially?	Text Box	
36A	Does the organization (as a third party resident services provider) do any kind of fundraising/grant writing/leveraging of resources to support resident services operations at properties where they are contracted to provide resident services coordination? <i>This could include fundraising to support corporate level staff, investment in technology systems, property level staff, on-site programming support etc.</i>	Drop Down- Y/N	
36B	If No: Please describe how the organization's business model functions to both cover the costs of providing resident services coordination at properties while still maintaining a minimum standard of quality of programming. How does the organization think about this strategically and how might this inform the contracts the organization takes on with new owners?	Text Box	
36B	If YES: What does the organization fundraise for? [[Corporate Staffing; Regional Staffing; Property Staffing; Training; Technology/Data Systems; Programming Support; Other - Please Specify]]	Drop Down/ Select All Text Box (for Other)	
36C	If YES: Who is responsible for this fundraising? Please provide the staff title/role (not the person's name)	Text Box	

CORES Recertification Application Questions - Third Party Model

Question #	Resident Services Certification Questions	Answer Type	Attachments
36D	<p>If YES: What are the sources of funding?</p> <p>[[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.]]</p>	<p>Drop Down/ Select All</p> <p>Text Box (for Other)</p>	
36E	<p>If YES: Please describe how the organization deploys the fundraised resources to support resident services coordination at properties where they have been contracted to provide resident services. Do all properties get the same amount of support? Does the organization do targeted fundraising in support of particular properties or programs? How is this determined by or incorporated into the organization's business model?</p>	Text Box	

F. Evaluation of Resident Services Efforts			
37A	<p>At the property level, does the organization (as a third party resident services provider) track and analyze indicators related to its resident services efforts?</p>	Drop Down- Y/N	
37B	<p>If YES: Please upload two Resident Indicators and Analysis Reports from properties that demonstrate this analysis. These reports 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 reports should be for the same properties as the uploaded community scans, resident opportunities & priorities assessment reports, and property services plans.</p> <p>Resident Indicators and Analysis Report (Single Property) - Property example 1 This Resident Indicators & Analysis Report should be for the same property featured in your last CORES application.</p> <p>Resident Indicators and Analysis Report (Single Property) - Property example 2 This second Resident Indicators & Analysis should be for an additional property in your portfolio.</p>	<p>UPLOAD #1</p>	<p>Resident Indicators and Analysis Report Property example 1</p>
		<p>UPLOAD #2</p>	<p>Resident Indicators and Analysis Report Property example 2</p>
37C	<p>If yes: 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 than every two years]</i></p>	Drop Down - Select One	
37D	<p>If yes: Who is responsible for completing the Resident Indicators and Analysis Report?</p> <p>[[Corporate/Organizational Staff; Regional Resident Services Staff; Onsite Resident Services Staff; Property Management; Owner Staff, OTHER]]</p>	<p>Drop Down/ Select All</p> <p>Text Box (for other)</p>	

CORES Recertification Application Questions - Third Party Model

Question #	Resident Services Certification Questions	Answer Type	Attachments
38A	What tools does the organization use to collect and track resident indicators/outcomes/impact? <i>Select all that Apply.</i> [[Social Solutions (ETO/Apricot); Family Metrics; AASCOOnline; Salesforce; Service Point; Integratec; Success Measures; Proctor Software; Power BI; Excel; HMIS; Property Management Software; Other (Please Specify)]]	Drop Down/ Select All Text Box (for other)	
38B	Have there been any changes to the tools your organization uses in the last five years? If there have been no changes, please indicate that in your response.	Text Box	
39A	Are residents involved and engaged in assessing the success and/or quality of the programming or services?	Drop Down- Y/N	
39B	If YES: Please describe how residents are involved in assessing the success and/or quality of the programming or services, and include one specific property level example in your description.	Text Box	

Acknowledgments & Sign off			
40	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	
41	Please download the linked "Executive/Principal Sign Off Form", fill it out, and upload it below. This form must be completed by an executive or principal of the organization who has the authority to make financial strategic decision on behalf of the organization.	UPLOAD	Executive/Principal Sign Off Form
42	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 Third Party Providers

Organization Name:

Property Type	# of Properties for which the organization currently provides RSC (as a third party provider)?	# of Units for which the organization currently provide RSC (as a third party provider)?	# Properties with Onsite RS Coordinator? (PT or FT)	# Properties where the organization provides third party RSC and there is a community space?	How long has the organization been providing third party RSC services in this type of housing (years)?	# Properties with related Property Management company?
Senior						
Family/Unrestricted						
Special						
Permanent Supportive						
Veteran						
Other:						

If possible, please estimate what percentage of the organization's portfolio you would describe as rural?	
If possible, please indicate approximately what % of properties that you provide services at (as a third party) have free property wide internet accessible to residents?	
If possible, please indicate approximately what % of properties that you operate at (as a third party) have free internet accessible in common areas/community spaces?	

Please provide a list of all the owners for whom the organization provides third party resident services. Please list these in order of owners that have the most significant # of contracts with your company to provides 3rd party resident services to least.

	Name of Owner	What percentage of organization's contracts does this owner have?	How long has the organization contracted with this owner to provide services?
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			

Data Form

Organization Name

What information and data from residents is typically utilized as a part of resident services coordination?

Put an "X" in all appropriate columns for each data point collected. For example, if there is aggregate data shared in reports from property management that is also collected by resident services staff directly, denote an X in column D and F.

	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					
Age					
Sex					
Race/Ethnicity					
Income					
Employment					
Non Work Income (disability, SS, pension, other)					
% income paid to rent					
Banking Info					
Other (Please specify below)					
Compliance Data					
Eviction/Notice to Quit					
Late Rent Payment					
Change in Income/Employment					
Move In/Move out					
Other (Please specify below)					
Resident Surveys					
Individual Assessments (intake forms, one-on-one individualized assessments)					
Focus Group Information					
Other:					