CORES Recertification

January 26, 2023
Certified Organization for Resident Engagement & Services

CORES recognizes owner-operators and third-party providers that have developed a robust commitment, capacity, and competency in providing resident services coordination in affordable rental homes.
Desired Outcomes – CORES Initiative

• Start to establish guidelines, common language and standards for resident services

• Continued culture and systems change at the practitioner, policy maker, and investor level

• Stable funding for resident service coordination and implementation

• Demonstrated the impact of stable, affordable housing enriched with services
Framework for a System of Resident Services Coordination

A Resident Services Coordination system includes all functions tied to the organizational mission to implement resident services including: corporate and site-based staff; training and capacity building; programs, services, and partnerships; relationship-building; use of data, research, and evaluation; technology systems; sustainable funding; and other organizational tools necessary to support resident services.

STAKEHOLDERS ENGAGED
- Residents/Community
- Resident Services
- Executive Suite
- Development
- Property Management
- Information Technology
- Asset Management
- Fundraising
- External Partners

Organizational Goals for Resident Well-being & Stability

Assess Community Needs, Resources, Providers

Decision to Provide Services at Property

Interactive Engagement & Re-evaluation for Alignment

Prioritize Resident Goals & Opportunities

Assess Information on Residents

Identify and Establish Partnerships

Ongoing Collaboration & Engagement with Residents

Determine Objectives & Indicators for Success

Determine and Implement Changes

Assess Services and Partnerships

2021 Update

Typically at corporate/regional level
Typically at property level

SAHF
STEWARDS OF AFFORDABLE HOUSING FOR THE FUTURE
CORES Recertification

• CORES **Certification** applies to the **organization**, covering the entire portfolio, for **five years**, when an organization must recertify.

• CORES **Recertification** *(required every 5 years)* ensures the certified organization **continues to meet CORES requirements** and is maintaining a robust commitment and the infrastructure to support resident services.

• Recertification will include **additional requirements and questions** in order to recognize that the resident services field is **constantly evolving** and that an org’s business model and infrastructure will evolve over five years.

• We recommend beginning the CORES Recertification process **three months in advance** of an organization’s CORES certification expiring.
## Three CORES Models

<table>
<thead>
<tr>
<th>Direct Model*</th>
<th>Hybrid Model</th>
<th>Third Party Model</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Affordable housing owner-operators retain <strong>direct responsibility</strong> for the development, management, delivery, and implementation of RS Coordination infrastructure and staffing.</td>
<td>• Affordable housing owners contract with an unrelated third-party entity (property management company/other services organization) to hire on-site RSCs/staff</td>
<td>• An owner may contract with an external (third party) organization to provide all aspects of RSC (management, delivery, implementation of RSC) at property/corporate/regional levels.</td>
</tr>
<tr>
<td><em>If an organization is certified under more than one model (i.e., Direct + Third Party), they will have to recertify for each model separately.</em></td>
<td>• However, the owner/operator has developed and manages the resident services infrastructure - retaining leadership, management, standards, and support capacity for RSC at their properties</td>
<td>• Third party services may be provided for one owner or for multiple</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Third party organization would gain certification (not the owner)</td>
</tr>
</tbody>
</table>

*When completing the Recertification pre-screen form, applicants will be asked about their current service model. If an organization’s model has changed in the last five years, CORES will reach out to have a conversation to better understand these changes.*
CORES Recertification

- Approximately **40** questions (**less than initial app**) for Recertification (regardless of the RS Model)
- Variety of formats: Text Boxes, Drop Down, Select All, Requested Documents, Required Documents
- Most questions deal with an organization’s demonstrated process and approach to RS Coordination
- Upon Recertification, there are now **10 threshold requirements** (**1 more than previously**) informed by the Framework for a System of Resident Services Coordination.
  - **NEW**: An executed MOU/Formal Agreement with a partner org (i.e., YMCA, food bank, etc.) from the last 3 years is now required
- Organizations must still be using the **4 Threshold Property-Level Documents/Tools**
  - **NEW**: Orgs need to provide up-to-date examples of each document/tool from **two** properties
- **NEW**: Changes to minimum scoring requirements for **use of community data** and **tracking impact/outcomes** (related to the Community Scan & Resident Indicators & Analysis Report)
- The cost for the five-year Recertification remains the same as initial Certification at $5,500
Original 9 CORES Threshold Requirements
(still required for Recertification)

1) Three Or More Years Of Experience as a Multifamily Housing Provider (Direct or Hybrid)
   • For Third Party Model, must have 3 years' experience as a third party provider

2) Must Fit One of The Models: Direct, Hybrid or Third Party

3) Three or More Years Of Experience with Resident Services Coordination

4) RS Coordinator Staff & Coordination at More Than One Property

5) Strategies For Addressing Low Participation Rate of Residents

Use 4 Threshold Property-Level Documents/Tools

   NEW - provide examples of each tool for 2 properties:

   6) Community Scan

   7) Resident Opportunities & Priorities Assessment

   8) Property Services Plan

   9) Resident Indicators & Analysis Report
For additional information on the CORES threshold documents, please watch our webinar overview of the Threshold Documents.

**COMMUNITY SCANS (2)**
- Update every 6 yrs

**RESIDENT OPPORTUNITIES & PRIORITIES ASSESSMENTS (2)**
- Update every 3 yrs

**PROPERTY SERVICES PLANS (2)**
- Update every 3 yrs

**RESIDENT INDICATORS & ANALYSIS REPORTS (2)**
- Update annually

For Recertification, an updated example of each document/tool from the initial CORES application property, plus an additional up-to-date example of each for one additional property in the applicant’s portfolio is required.
New Requirements for Recertification

For each of the 4 Key Property-Level Documents/Tools (Community Scan, ROPA, Property Services Plan, and RIAR) the applicant must demonstrate use of these tools at **two** properties.

**Applicants will be asked to upload:**

1. An **updated** example of each document/tool from the **initial** CORES application property &

2. An up-to-date example of each document/tool for one **additional** property in their portfolio

*This means eight documents will be uploaded here.*
Changes in Minimum Scoring Requirements for Use of Community Data:

- The applicant must clearly articulate what types of community level data are considered/assessed AND
- How community level data is used to inform and assist with program/service planning. (i.e., census data, local school data, data from a local government agency, etc.). **The organization must utilize community level data to achieve certification.**
- Community data should be captured in the uploaded *Community Scans.*
**Changes in Minimum Scoring Requirements for Tracking Impact/Outcomes:**

- The applicant must demonstrate that they are collecting and tracking Resident OUTCOMES, not only outputs such as participation or the number of referrals provided.

- This should be captured in the uploaded *Resident Indicators & Analysis Reports.*
Outputs Versus Outcomes

“Outputs” may include things like:

1. The types of programs or services being coordinated or offered, such as financial stability programs.

2. The intensity or duration of programs, such as weekly or monthly.

3. Resident participation, uptake or engagement, measured as attendance or number of contacts.

4. The entity providing the program, such as the resident services coordinator or a community partner.

“Outcomes”....

- Track resident change, well-being or progress.
- Are short, medium, or long-term.
- Can include resident satisfaction or perceptions.
- Can assess different impact areas (i.e., health, security, agency, economic mobility, etc.).
- Can also include indicators such as resident assets, lease violations, ER visits, etc.

Examples of outcome measures:

- % of residents enrolled in health insurance.
- % of residents whose income or assets increased.
- % of residents that feel safe in their building.
- % residents moved for negative/positive reasons.
- Other Resident Satisfaction Data.
- Any many others!

CORES upcoming webinar will discuss tracking and evaluating outcomes and share SAHF’s newest report, “A Toolkit and Framework for Equitable Outcomes Measurement in Affordable Rental Housing.”
New 10th Threshold Requirement for Recertification:

Organization must include an **Executed Memorandum of Understanding (MOU)** or formal agreement with a partner organization from the last three years.

*This example agreement does not have to be in place at the same properties used for the 4 Property-Level Documents/Tools (i.e., Community Scan, etc.)*

Note: The initial CORES application included questions about partnerships and requested an example MOU, but this was not previously a Threshold Requirement. The MOU is now a Threshold Requirement for Recertification.
Additional Recertification Changes

• Applicants will answer a similar set of questions, with some questions removed where additional information is not required to recertify.

• For many questions, applicants will be asked to update their answers from the initial certification to reflect any changes in the last five years.

• Updated wording on several questions included in the initial application for additional clarification.

• Several other **NEW** questions explore the org’s evolution to meet some of the changing resident services needs and best practices in the field (i.e., use of virtual services/staffing, DEI training, etc.).
## CORES Recertification Rubric Score Card

**Example: Direct Model Applicant Scoring**  
*(Please Note: scoring may vary by model – visit the CORES website for additional information)*

<table>
<thead>
<tr>
<th>Application Sections</th>
<th>Total Points Available</th>
<th>Req. Points to Pass each Section</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>A. Portfolio Profile</strong></td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td><strong>B. Resident Services Coordination</strong></td>
<td>17</td>
<td>11</td>
</tr>
<tr>
<td>- Resident Services Coordination</td>
<td>8</td>
<td>N/A</td>
</tr>
<tr>
<td>- Resident Services Coordinators (RSC)</td>
<td>6</td>
<td>N/A</td>
</tr>
<tr>
<td>- Resident Services Systems</td>
<td>3</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>C. Utilizing Information about Residents &amp; the Community</strong></td>
<td>13</td>
<td>8</td>
</tr>
<tr>
<td>- Larger Community/Neighborhood Assessment</td>
<td>6</td>
<td>N/A</td>
</tr>
<tr>
<td>- Resident Data</td>
<td>7</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>D. Resident Services Program Plan</strong></td>
<td>13</td>
<td>9</td>
</tr>
<tr>
<td>- Program Implementation</td>
<td>7</td>
<td>N/A</td>
</tr>
<tr>
<td>- Partnerships</td>
<td>3</td>
<td>N/A</td>
</tr>
<tr>
<td>- Resident Engagement</td>
<td>3</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>E. Funding &amp; Sustainability of Resident Services</strong></td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td><strong>F. Evaluation of Resident Services Efforts</strong></td>
<td>8</td>
<td>5</td>
</tr>
</tbody>
</table>

**Org. meets** **ALL** threshold requirements  
**Org. meets minimum points in each section**  
**Org scores minimum of 40 points across all sections**
Preparing for Recertification

• All applicants should review their initial app and any feedback well in advance of beginning the Recertification process

• The Recert. app will be submitted through a separate portal link, which will be available soon on the CORES website. Application questions are currently available at CORESonline.org/Apply#Recertification

• The Recert. app is connected to the same portal system as initial Cert., and applicants should use the same login information as when they first certified. Certification questions will also be in a similar format

• Organizations should start the Recert. process at least three months prior to their recertification date to avoid a lapse in CORES certification

• The Recert. date is included in the initial CORES cert. email notification and letter
CORES Recertification Review Process

**Recertification Prescreening**
- Reviewed by CORES in 3-5 business days
- Approved (Email notification)
- Denied (Email notification)

**Recertification Application Submitted**
- Org. completes CORES Recert. Application
- Given access to full Recert. application
- Payment received
- Directed to PayPal portal
- Receive email notification

**Recertification Application Reviewed**
- CORES Staff Reviews & Scores Recert. Application
- CORES Staff make recommendation (Full Recertification or Denied Recertification)
- Scorecard & Summary Analysis shared with 3 members of Peer Review Committee
- Peer Review Committee members review and concur/disagree

**Recertification Approved/Denied**
- CORES Staff reviews committee’s feedback; applicant is notified of Recert. application status by email
- If denied: option for written appeal
- Reviewed by full Peer Review Committee

4-6 weeks for review
Navigating Recertification in the Portal

Once you have the link to the recert. portal, log in using the same information you used for your initial certification portal.

If you have trouble accessing the portal, contact CORES staff at cores@sahfnet.org
Navigating Recertification in Portal

Once you log into the portal, you will need to select the ‘get started’ button to begin your application.

You can view and edit your applicant profile information by selecting the ‘edit’ button to the right.

In this section you will be able to access all of the forms for CORES. You will have access to them as drafts and also to the finished product once completed.
Navigating Recertification in Portal

Selecting the ‘get started’ button will take you to a page to complete your Recertification pre-screen form. Hit the ‘open’ button to begin.
Navigating Recertification in Portal

To save a draft pre-screen, select ‘save draft’.

Once you are done making edits, hit the ‘mark complete’ button.
Navigating Recertification in Portal

Once you have hit ‘mark complete’, you will see a ‘submit’ button.

Hit ‘submit’ once you are ready to submit your pre-screen form to CORES staff.
Navigating Recertification in Portal

Once submitted to CORES staff, your pre-screen form should say 'this has been submitted'.

You can view your submitted pre-screen form by hitting the 'view' button. You will also receive an email from CORES confirming your pre-screen form’s submission.
Navigating Recertification in Portal

When you navigate back to the Recertification portal homepage, you will also see your application status (pre-screen submitted).
Navigating Recertification in Portal

Once CORES reviews and approves your pre-screen form, you will receive an email notifying you and your application status will change to ‘payment outstanding’ in the Recertification portal.

Click on payment outstanding to access your Recertification app invoice.
Navigating Recertification in Portal

Now you will see the option to view your invoice under ‘Payment Information.’ Click View.

Payment Information

Invoice

Recertification Pre-Screen

Thank you for completing the CORES pre-screen form. If the pre-screen is approved, you will receive an email within 3-5 days of completing the pre-screen with a link to the full application.
Navigating Recertification in Portal

Here you will see your invoice details, including a PayPal 'Invoice URL'. Click this URL link to access and pay your Recertification application invoice.

You must submit payment first to access the full application.

If you need to make payment via ACH transfer instead, please contact the CORES team at cores@sahfnet.org.
Navigating Recertification in Portal

Once you have made payment, your invoice status will change to ‘**Paid**’ and you will receive an email confirming your payment.

Once you pay your invoice, you will have access to the full CORES application.
Navigating Recertification in Portal

For step-by-step guidance on how to use this applicant portal, please refer to the CORES website (www.coresonline.org) under the "Apply" and "Step-By-Step Guide" tab. Click the Get Started Button to begin.

In this section you will be able to access all of the forms for CORES. You will have access to them as drafts and also to the finished product once completed.

On the Recertification portal homepage, you will now see that you can start your full CORES Recertification application by clicking ‘Full Application Intake’.
Navigating Recertification in Portal

Once on the new page, click the ‘open’ button under ‘Full Application Intake’ to begin your application.

Full Application Intake

While working on this application, use the "save button" at the bottom of the application, which will save a draft of the application and allow you to return to it and make edits. When finished making any edits within the application (and you are ready to submit), use the blue "MARK COMPLETE" button. After hitting the "Mark Complete" button within the application, you will return to this page. Once you hit the green SUBMIT button (top right), the application is submitted and you will no longer be able to make edits.

Recertification Application

The CORES Recertification application consists of approximately 43 questions with a combination of drop-down, text boxes, and required uploads. You will be able to save as you go so that you can return to the application. To save as a draft hit Save Draft at the top or bottom of the screen. Only use the blue Mark Complete button when ready to submit.

Please complete all the questions to the best of your ability. If you have any questions, please check out coresonline.org for resources or email CORES at cores@sahfnet.org.
Now you have access to the full application. To save a draft of your application, select ‘save draft’ at the top of the application. You can then exit the application and return to make further edits at another time.

Once you are done making edits, hit the ‘mark complete’ button.

If you intend to make further edits after completing the application, please "Save Draft". Use the Mark Complete (blue button) when you are ready to submit.

When completing the Re-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.
Navigating Recertification in Portal

Next, you need to hit the green ‘submit’ button under ‘Full Application Intake’ to submit your application for CORES staff to review.

You will also receive a notification email.
Navigating Recertification in Portal

For step-by-step guidance on how to use this applicant portal, please refer to the CORES website (www.coresonline.org) under the "Apply" and "Step-By-Step Guide" tab.

Click the Get Started Button to begin.

In this section you will be able to access all of the forms for CORES. You will have access to them as drafts and also to the finished product once completed.

The status of your application will now change to ‘Full Application Submitted,’ and you can no longer make edits to your application.

You can view your application by hitting ‘Full Application Submitted’ and the ‘view’ button on the following page.
1. **What happens if I accidentally submit my application before it’s complete?** Please contact CORES staff and we can help you to access your application.

2. **What happens if CORES reaches out to me to make edits to my submitted application?** If you need to make edits to your application after it is submitted, CORES will give you access to your application to make edits. Once your edits are resubmitted, the 4-6 week application review window will restart.

3. **Who reviews my application?** Similar to initial certification, 2 CORES staff review the application, and then a 3-person peer review committee reviews the CORES staff recommendations and full application to reach a final determination.

4. **The person who submitted our initial CORES application is no longer with our organization. How do I access the CORES portal?** Please email the CORES team at cores@sahfnet.org and we will help reassign you as the new point of contact to access your CORES application materials.

5. **The property we used for our CORES application is no longer in our portfolio. What should we do?** Once you complete the CORES Recertification pre-screen form which asks about this, a member of the CORES team will reach out to you to discuss next steps.

6. **Are you allowed to select a property for the key document uploads (Community Scan, Resident Opportunities & Priorities Assessment, Property Services Plan, Resident Indicators & Analysis Report) that is part of Fannie Mae’s Healthy Housing Rewards™ - Enhanced Resident Services (ERS) program?** Yes, you may choose to highlight a property from the ERS program in your Recertification application key document uploads.
CORES Resources

Resource Library & COVID 19 Resource Page
✓ Practitioner-Developed Templates and Tools
✓ New Research and Capacity-Building Resources
✓ Updated COVID-related guidance and relevant policy updates

Quarterly Newsletters & Webinars
✓ Updates on the CORES Recertification process
✓ Resident services resources & capacity-building tools
✓ Updates on program design and innovations
✓ Announcements for upcoming training and webinars

https://coresonline.org/newsletter
Thank you for joining!

Visit: www.CORESonline.org
Contact: cores@sahfnet.org

For questions about Fannie Mae’s Healthy Housing Rewards™ Initiative

Visit Fannie Mae’s Multifamily Website:
https://multifamily.fanniemae.com/financing-options/specialty-financing/healthy-housing-rewards