

Updated 3.1.23

CORES Recertification Application Questions - Direct Model

Question #	Resident Services Certification Questions	Answer Type	Attachments
	<p>When completing this 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.</p> <p><i>Note: All threshold questions are highlighted in green.</i></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>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>	Drop Down	

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1B	Please download the portfolio profile form provided, fill it out, and upload it below.	UPLOAD	Portfolio Profile
1C	<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.</p> <p>Has your organization grown in terms of the number of properties you own or operate or where you provide resident services? A reduction in the number of properties or 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			
	<i>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.</i>		
2A	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.	UPLOAD	Org. Chart

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2B	<p>If your organizational structure has changed significantly since your last application, especially as it relates to resident services, please describe this change.</p>	Text Box	
3	<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). How has the approach evolved as the portfolio and/or the organization have changed?</p> <p>Please note: reviewers will view this in conjunction with the property profile. 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	

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4	<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	
5	<p>If your organization has had significant portfolio growth over the last five years, do a percentage of properties have PSH set aside units in a general occupancy building? If yes, how have you adjusted your service model to provide more in-depth services to residents living in PSH units, while still providing less intensive services for the rest of the building?</p> <p>If your portfolio has not grown over the last five years to include more PSH set aside units, please indicate N/A.</p>	Text Box	
6	<p>In a typical property, how frequently does property management and resident services staff meet at the property-level (weekly, biweekly, monthly, quarterly etc.)? And how often does property-based staff meet with regional/corporate level resident services staff?</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	

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7A	Does the organization have a protocol or strategy for how to resolve conflicts that may arise from differences in the roles of property management and resident services?	Drop Down- Y/N	
7B	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, and/or other systems.	Text Box	
8	If the organization provides any resident services virtually, which services are provided virtually and how does the organization decide which services are provided virtually? What factors and/or strategies does the organization consider to promote the efficacy of virtual resident services?	Text Box	
9	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.) 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.	Text Box	
<i>Resident Services Coordinators (RSC) -- The staff person at a property responsible for implementing programs/services with partners and</i>			

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Question #	Resident Services Certification Questions	Answer Type	Attachments
10	<p>When the organization provides resident services coordination onsite at a property, 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

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11	<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/training/experience if applicable).</p> <p>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	
12	<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	
13	<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	

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Question #	Resident Services Certification Questions	Answer Type	Attachments
14A	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	
14B	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	
15	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	

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Question #	Resident Services Certification Questions	Answer Type	Attachments
16	How does the RSC 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			
17A	<p>Are there technologies, resources, systems, and/or other tools that are used for resident services coordination across the portfolio and organization to support communication, efficiency and/or consistency of services? <i>(e.g. technology platforms, robust peer support network across the portfolio, standardized curriculums, resource guides etc.)</i></p> <p><i>Please note that data collection tools will be addressed later in the application.</i></p>	Drop Down- Y/N	
17B	<p>If YES: Please provide at least two examples of technologies, resources, systems, and/or tools that have been scaled to use across multiple properties (more than three properties) in your portfolio. 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.</p>	Text Box	

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Question #	Resident Services Certification Questions	Answer Type	Attachments
18A	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
18B	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	
18B	If Yes: Please upload the framework of goals/theory of change/logic model for Resident Services Coordination at the organization.	UPLOAD	

C. Utilizing Information about Residents & the Community			
<i>Larger Community/Neighborhood Assessment</i>			
19A	Does the organization use information/data from the surrounding community to help inform a community scan and/or resident opportunities & priorities assessment ? (<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>)	Drop Down - Y/N	

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Question #	Resident Services Certification Questions	Answer Type	Attachments
19B	<p>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.</p>	Text Box	
19C	<p>If Yes: How often does the organization access or collect this community level information?</p>	Text Box	
20A	<p>Does the organization 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.</p>	Drop Down - Y/N	
20B	<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	

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Question #	Resident Services Certification Questions	Answer Type	Attachments
20B	<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. 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 Indicator & Analysis Reports) for these same two properties throughout the rest of the application .</p> <p>NOTE: IF your organization no longer owns/operates resident services at the property featured in your original CORES application, please contact CORES staff before proceeding.</p>	<p>UPLOAD #1</p>	<p>Community Scan Property Example 1</p>
		<p>UPLOAD #2</p>	<p>Community Scan Property Example 2</p>
20C	<p>Typically, does the organization utilize a community scan that is updated at least once every six years?</p>	<p>Drop Down - Y/N</p>	
<p>Resident Data</p>			

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Question #	Resident Services Certification Questions	Answer Type	Attachments
21A	<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	
21B	<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>	Text Box	
21B	<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>	UPLOAD #1	<p>Resident Opportunities & Priorities Assessment Report - Property Example 1</p>

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Question #	Resident Services Certification Questions	Answer Type	Attachments
		UPLOAD #2	Resident Opportunities & Priorities Assessment Report - Property Example 2
21C	If YES: Typically, does the organization collect information on Resident Opportunities and Priorities Assessments at a property at least once every three years?	Drop Down- Y/N	
22	DATA Question -- See "Data Question Tab" Please download the Data Question Chart (found at the beginning of the application), fill it out, and upload it here.	UPLOAD	

D. Resident Services Program Plan	
	<i>Program Implementation</i>

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23A	<p>Provide property services plans from two properties that have already been implemented. Property Services Plans should be updated <u>at least</u> 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><i>Note: This Property Services Plans should be for the same properties for which you provided Community Scans and Resident Opportunities and Priorities Assessments.</i></p>	UPLOAD #1	Property Services Plan - Property Example 1
		UPLOAD #2	Property Services Plan - Property Example 2

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Question #	Resident Services Certification Questions	Answer Type	Attachments
23B	Typically, does the organization update or assess property services plans at least once every three years?	Text Box	
24	How are surveys, data, and direct feedback from residents used to update the property service plan?	Text Box	
25	<p>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.</p> <p><i>This should be no more than a 4-5 sentence description for each program.</i></p>	Text Box	
Partnerships			
26	What is the organization's process for assessing a potential partner, their approach towards service provision and their quality of services? 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	
27A	When you work with partners do you use MOUs or formalized written agreements with service partners?	Drop Down- Y/N	
27B	<p>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.</p> <p>Note: You may redact identifying information if necessary between your organization and external organizations.</p>	UPLOAD	MOU

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27C	<p>In the formalized MOU/written agreements, please indicate if the agreements include the following. <i>Select all that Apply.</i></p> <p>[[[1)Roles + Responsibilities; 2)Participation targets/expectations; 3)Goals; 4)Outcome/impact goals;5) Addresses insurance and liability; 6)data sharing (if applicable)]]</p>	Drop Down/ Select All	
Resident Engagement			
28	<p>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.</p>	Text Box	
29	<p>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 including how you 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).</p>	Text Box	

E. Funding & Sustainability of Resident Services			
30	<p>Funding Question -- See "Funding Question Tab"</p> <p>Please download the Funding Chart (available at the beginning of the application), fill it out, and upload it here.</p>	UPLOAD	

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31	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?	Text Box	
32A	Has the organization made any significant changes in how they fund/resource resident services in their portfolio in the last five years?	Drop Down- Y/N	
32B	IF YES: Please describe these changes.	Text Box	
33	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.	Text Box	
34A	In addition to any fundraising that happens at the property level, does the organization have dedicated resources/staffing to support additional resource development, fundraising, and/or capacity-building for Resident Services at the organization/corporate level?	Drop Down- Y/N	
34B	If NO: How does the organization raise the additional funds, resources, or capacity needed?	Text Box	

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Question #	Resident Services Certification Questions	Answer Type	Attachments
34B	If YES: Please describe the roles and responsibilities of those staff.	Text Box	

F. Evaluation of Resident Services Efforts			
35A	At the property level, does the organization track and analyze indicators related to its resident services efforts?	Drop Down- Y/N	
35B	<p>If YES: Please upload a recent Resident Indicators and Analysis Report from two properties which demonstrates 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: These reports should be for the same properties as the uploaded community scans, resident opportunities & priorities assessments, and property services plans.</p>	UPLOAD #1	Resident Indicators and Analysis Report (Single Property) - Property example 1

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Question #	Resident Services Certification Questions	Answer Type	Attachments
		UPLOAD #2	Resident Indicators and Analysis Report (Single Property) - Property example 2
35C	<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 than every two years]</i></p>	Drop Down - Select One	
36	<p>What tools does the organization use to collect and track resident indicators/outcomes/impact? Select all that Apply.</p> <p><i>[[ETO/Social Solutions; Apricot; Family Metrics; AASCOonline; Salesforce; Service Point; Integratec; Success Measures; Proctor Software; Excel; Property Management Software; Other (Please Specify)]]</i></p>	Drop Down/ Select All Text Box (for other)	
37	<p>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.</p>	Text Box	
38A	<p>Are residents involved and engaged in assessing the success and/or quality of the programming or services?</p>	Drop Down- Y/N	

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38B	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	
39	Please upload an analysis/report which demonstrates the value/impact of the organization's services across <u>multiple properties</u> . <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>	UPLOAD	Impact Analysis/Report (multiple properties)

Authorizations & Certification			
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	
42	SAHF is able to share all data and uploaded information from certification application with Fannie Mae.	Drop Down Y/N	

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

Organization Name:

How many years of experience does the organization have 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								
Special								
Supportive								
Veteran								
Other: _____								

If possible, please estimate what percentage of the organization's portfolio you would describe as rural?	
If possible, please indicated approximately what % of properties have free property wide internet accessible to residents?	
If possible, please indicate approximately what % of properties have free internet accessible in common areas/community spaces?	

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:					

Historically how does the organization typically fund.....?			
	Resident Services leadership and infrastructure at the Corporate and Regional Level?(check all that apply)	Resident Services Coordinators at the property level?(check all that apply)	Resident Services (aside from the Coordinator) at the property level? (check all that apply)
Property operations			
Residual receipts			
Reserve set up through development of the property			
Federal Government funds			
State Government Funds			
Local Government Funds			
Non-governmental grants			
Donations			
Org Contributions from retained earnings			
Senior Housing -202 grant			
Senior Housing-202 adjustment in budget based rent			
In-kind			
Partnerships(partner funds)			
Volunteer time			
Other (Please Specify Below)			
Overall, what are the two largest sources for each category?			