As affordable housing providers expand and systematize their resident services programs across their portfolios, a data system can help them track, quantify and evaluate their programs, services and outcomes. The best data system is one that meets the needs and constraints of the affordable housing provider – there is no one size fits all approach. With the attached grid, SAHF provides a listing of the most commonly-used resident services data systems among the CORES certified organizations and SAHF members, to the best of our knowledge. We hope this can provide a starting place for affordable housing providers interested in purchasing a data system or switching to a new one. This list is not exhaustive and is based on what we have learned from conversations with our peer networks and members. Another good resource is this report by the Urban Institute in 2015: “Navigating Performance Management Software Options.” TechImpact also published a detailed report in 2015, “Consumers Guide to Case Management Systems,” that provides more details about specific systems, notably ETO, Apricot, and Salesforce.

The grid on the next page provides details about Family Metrics, ETO, AASC Online, Salesforce, Success Measures Data System (SMDS), Apricot, and Care Guide. However, there are other data systems used by affordable housing providers that we did not include:

- Aunt Bertha’s enterprise-level platform allows organizations to make referrals to community partners/service providers and “close the loop” with those providers to ensure that residents’ needs were met. For example, WinnCompanies has created a customized platform with Aunt Bertha called Connect. Aunt Bertha’s commitment to making sure community resources are up-to-date and user-friendly interface could make this a great option for organizations that provide more referrals than direct programming.
- ServicePoint is an established, sophisticated case management system, most commonly used by providers of housing for formerly homeless, as part of a HUD Continuum of Care. It is a popular example of a HMIS (homeless management information system). Although it is somewhat prevalent across affordable housing, it is not included below due to its narrow application and function as a homeless management information system.
- Property management systems, such as Yardi, RealPage and MRI, have begun to include resident services modules/reporting within their platforms. For example, Integratec has some of that functionality and was recently acquired by MRI Real Estate Software. These systems have the benefit of being automatically integrated with property management and compliance data, such as household tenancy and income, but may lack the user-friendly interfaces and supervisory functions of a system like ETO or AASC Online.

Lastly, Microsoft Excel, Access, and Power BI are great tools for smaller organizations just starting to track services and collect data. For organizations starting to collect more resident data, using these tools could help staff better understand their data needs and priorities before they invest in an expensive data system/software package.
<table>
<thead>
<tr>
<th>Parent company/owned by</th>
<th>Target Users</th>
<th>Prevalence in affordable housing (to SAHF’s knowledge)</th>
<th># CORES certified orgs using system</th>
<th>Strengths (as reported to SAHF by members)</th>
<th>Limitations (as reported to SAHF by members)</th>
<th>Approx. Cost Range</th>
<th>Integration with HUD Standards for Success</th>
<th>Potential for integration with property mgmt. software</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Family Metrics</strong></td>
<td><strong>Pangea Foundation</strong></td>
<td><strong>Family housing providers with RSC’s</strong></td>
<td>High (popular as the family version of AASC Online)</td>
<td>7</td>
<td>Very easy for RSC’s to use; tailored to family affordable housing; good customer service; compatible with HUD Standards for Success</td>
<td>Any customization of forms/reports must be contracted through Pangea; no compatibility with other software</td>
<td>$$</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Efforts to Outcomes (ETO)</strong></td>
<td><strong>Social Solutions</strong></td>
<td><strong>Large social service organizations &amp; government agencies</strong></td>
<td>Medium (historically a popular tools across the nonprofit sector)</td>
<td>5</td>
<td>Sophisticated software tailored to case management; cloud-based encrypted storage; HIPAA-compliant; allows customization of forms, surveys, and reports</td>
<td>Clunky, non-intuitive interface for RSC’s; not mobile-friendly; reporting can be slow and glitchy; slow response rate from Social Solutions support/customer service</td>
<td>$$$</td>
<td>No</td>
</tr>
<tr>
<td><strong>AASC Online</strong></td>
<td><strong>Pangea Foundation</strong></td>
<td><strong>Senior housing providers with RSC’s (particularly AASC members)</strong></td>
<td>High (popular among RSC’s at 202 senior properties)</td>
<td>4</td>
<td>Very easy for RSC’s to use; able to track many services specific to senior affordable housing; good customer service; compatible with HUD Standards for Success</td>
<td>Any customization of forms/reports must be contracted through Pangea; no compatibility with other software</td>
<td>$$$</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Salesforce</strong></td>
<td><strong>Salesforce (Nonprofit Success Pack (NPSP))</strong></td>
<td><strong>Anyone - for-profit and nonprofit organizations</strong></td>
<td>Low (just starting to be used for case mgmt. &amp; service tracking purposes)</td>
<td>1</td>
<td>Highly customizable; strong reporting &amp; dashboard tools; compatibility with other software</td>
<td>Requires significant customization and/or purchase of nonprofit-focused application(s)</td>
<td>$$(wide range)</td>
<td>No</td>
</tr>
<tr>
<td><strong>Success Measures Data System (SMDS)</strong></td>
<td><strong>NeighborWorks</strong></td>
<td><strong>NeighborWorks members; other housing providers</strong></td>
<td>Low among SAHF members; more common among NeighborWorks members</td>
<td>1</td>
<td>Comes with many evidence-based assessments and evaluation tools; user-friendly; unlimited number of users within an organization</td>
<td>More of a survey and evaluation tool than a case management or supervisory tool; no compatibility with other software</td>
<td>$</td>
<td>No</td>
</tr>
<tr>
<td><strong>Apricot</strong></td>
<td><strong>Solution Solutions</strong></td>
<td><strong>Small to mid-size social service organizations</strong></td>
<td>Low (product acquired by Social Solutions around 2015)</td>
<td>1</td>
<td>Strengths of ETO at a lower price point</td>
<td>Slow response rate from Social Solutions support (could be other issues unknown to SAHF)</td>
<td>$$$</td>
<td>No</td>
</tr>
<tr>
<td><strong>Care Guide</strong></td>
<td><strong>National Church Residents in partnership with Prelude Services</strong></td>
<td><strong>Service Coordinators working with seniors</strong></td>
<td>Low (National Church Residents just starting to license software to 3rd parties)</td>
<td>1</td>
<td>National Church Residents is a leader in the senior affordable space and has designed Care Guide to meet the needs of senior property RSC’s</td>
<td>Product intended to be paired with QA services; not designed for family properties (however, users can build own content)</td>
<td>$$$</td>
<td>No direct API yet</td>
</tr>
</tbody>
</table>

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*a*Organizations utilizing multiple systems are counted for each system (duplicated). Additionally, 3 orgs use ServicePoint or other HMIS, 1 org uses Connect, and 1 org uses Integratec.

*b*However, organizations do not have to be NeighborWorks members to use SMDS

*c*National Church Residents is a member of SAHF; SAHF is not endorsing or recommending this product by including it in this list

*d*However, users with QA services receive a ready to upload report included with QA, as well as guidance/support with uploading as needed
One important consideration is cost. In the grid we provide dollar signs as a **rough approximation of cost**; the section below provides more details on cost and pricing.

- AASC Online reports on their [website](#) that the cost is $595 per year per service coordinator for AASC members and $895 per year per service coordinator for non-members. There is also a one-time set-up fee of $595 per property for AASC members; $895 set-up fee per property for non-members.
- Family Metrics reports on their [website](#) that the cost is $468 per year per service coordinator (or $49 per month) with no set-up fee. Additionally, up to five properties can be “managed” with every one service coordinator account (helpful for RSC’s who coordinate programming for multiple properties).
- Success Measures reports on their [website](#) that annual subscriptions range from $1,250 to $2,000 at the organization level, with an unlimited number of users.
- Social Solution does not publish pricing on ETO or Apricot online. Apricot was purchased by Social Solutions in 2015 and is marketed toward small to mid-size social service organizations, whereas ETO is now marketed toward larger organizations and government agencies. Social Solutions provided an approximate minimum cost threshold for Apricot of $6,000 annually for 10 users (with a commitment of using the system for at least 5 years), which divides out to approximately $600 per user. SAHF members using ETO have reported that pricing can vary widely by the level of customization and support an organization needs. As ETO is a more complex system, pricing starts at the level of Apricot and increases. SAHF members with 70-80 users reported spending approximately $32,000 on average, every year (however, this cost may not scale down proportionately to smaller organizations).
- Salesforce is simply a platform or base system on which customers can build customized databases or utilize ‘out of the box’ apps. One such app that one SAHF member uses is the **“Non-Profit Success Pack.”** The Salesforce Foundation provides up to 10 user licenses free for 501(c)(3) nonprofits. The “Non-Profit Success Pack” is $432 per year for each additional user/license over 10 users. There is an additional subscription that organizations can purchase for Salesforce help desk support, which is (reportedly) $4,300 annually for an unlimited number of users. SAHF members using Salesforce have reported the need to hire a consultant or in-house administrator position to help build their system, which is an additional cost. There may also be additional applications (apps) needed to enhance the system’s functionality, some of which are free and some of which require a subscription.
- National Church Residences\(^1\) provided the following cost information for their Care Guide system. The cost per user, per year is $750 in total ($420 for hosting/server maintenance and $330 for software/tech support). However, discounts are available when the system is bundled with other services National Church Residences provides, such as Quality Assurance or Service Coordinator Management. National Church Residences prefers to bundle the system with their Quality Assurance services, as the content is aligned with their model of service coordination, which QA ensures is being completed to the standards of the program. There is a one-time organizational set-up fee of $1,500. Custom assessments, system forms and custom reports are easily available and are priced by product.

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\(^1\) National Church Residences is a member of SAHF; SAHF is not endorsing or recommending this product by including it in this list.
To provide a like-to-like comparison across platforms, below is a grid of approximate total annual costs for an organization with 10 users/service coordinators. This does not include any initial set-up/build-out fees but does include ongoing help desk support, as best we can determine. Please note that the Apricot cost is highly approximate – please contact Social Solutions for a quote tailored to your organization’s needs. We were unable to obtain a cost estimate for ETO (and most likely it would not be a good fit for organizations with less than a dozen service coordinators). Salesforce is $4,300+ because additional cost for consultants or applications may be necessary.

<table>
<thead>
<tr>
<th>ETO</th>
<th>AASC Online</th>
<th>Family Metrics</th>
<th>Salesforce</th>
<th>Success Measures</th>
<th>Apricot</th>
<th>Care Guide</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unknown (&gt; $6,000)</td>
<td>$5,950 for members; $8,950 for non-members</td>
<td>$4,680</td>
<td>$4,300+ ($6,460 for 15 users)</td>
<td>$1,600 on average</td>
<td>Approx. $6,000</td>
<td>$7,500</td>
</tr>
</tbody>
</table>

A short list of items to consider when making a decision to purchase a system:

For organizations interested in utilizing/purchasing a new data system, here are some elements we think are important to consider in your decision. A more detailed version of this list can be found in the TechImpact report described on the first page of this memo.

- **Cost**: What is the per user or per property cost? Does it come with technical assistance/support (and if so, for how long)? How much does it cost to customize the system to meet the organization’s needs? How much does it cost to import the organization’s existing records/data from a different system, if applicable?
- **User experience**: How user-friendly/intuitive is the system for the end user, such as the resident services coordinator and/or property manager?
- **Manager/supervisor experience**: Can managers/supervise view information across various staff and/or properties? How intuitive are any approval or review processes? Does the system have a “dashboard” function that allows supervisory staff to view aggregated statistics in real time?
- **Customization**: How easy will it be to modify or customize the system, now or in the future? What type in-house technical expertise is needed to do this customization/maintenance?
- **Reporting capabilities**: What types of reports can be generated and at what levels? (e.g., Can you generate one report for your entire portfolio, if you want? Can you generate reports for each region, or city, or subpopulation?) How difficult is it to create new reports?
- **Integration with other software**: Can the system be integrated with other software, such as property management software, such that data entered into one system is regularly, automatically imported into the other? (This can reduce the staff burden of data double-entry and reduce entry errors.) For example, when new households move into a property, is their demographic and income data automatically populated into the resident services system? Or when households complete the recertification process, is their updated income and employment information automatically updated in the resident services system?