



The  **Neighborhood
Partnership Fund**

Resident Services Demonstration Project
SUMMARY OF THE FINAL REPORT
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In 2003, NPF interviewed its CDC partners and found growing interest and experience in resident services. While most CDCs had begun to see the value of linking services and housing, there was very little funding or training available for this work and it was hard to prove the results. While it appeared that resident services, if done well, improved both the lives of residents and the bottom line of the CDCs that offered them, a more thorough strategy was clearly needed to support these programs. NPF developed a comprehensive Resident Services Demonstration Project that began in 2004 with the help of the Paul G. Allen Foundation, Spirit Mountain Community Fund and PacifiCorps Foundation. Phase One began in 2004 and works at three complementary levels: capacity, training and evaluation.

The promise of linking resident services and affordable housing is based on the unique role of CDCs in the communities they serve. As a constant point of contact and often trust, CDCs have relationships with their residents that are not found in more traditional approaches to client services. From homelessness to homeownership, after school activities to workforce development, resident service programs work with residents to assess their needs and develop coordinated plans to make sure that residents are able to reach their fullest potential. Talented Resident Service Coordinators also solve problems and prevent evictions by working with residents as problems arise.

CDCs partner with a wide range of organizations and agencies and only provide new and direct services when there are not existing options available. As a result, strong resident service programs also help support and improve service provision throughout the community.

Ten CDCs took part in Phase One of the project. Each built a program that is unique and tailored to its organization's strengths, community circumstances, and resident needs. NPF incorporated professional evaluation into each aspect of the project in order to demonstrate the results and to build the case for more systemic funding of what is proving to be a very effective approach.

Project Goals

The Resident Services Demonstration Project had the following three main goals:

- Enhance, strengthen and provide stability to CDC resident service programs by increasing organizational capacity.
- Increase the skills, knowledge and competencies of Resident Service Coordinators through focused training and technical assistance.
- Describe and demonstrate the impact of resident service programs on organizational health and the lives of the people who live in CDC housing.

To achieve these goals, NPF used a combination of the following strategies:

- Targeted organizational capacity investments to ten organizations throughout the state.
- Tailored training and technical assistance to increase staff skills and strengthen their programs.
- A professional evaluation to document the impact of resident services.

Participant Organizations

Participating organizations were selected through a competitive process open to CDCs in NPF's Capacity Building Programs. An external committee reviewed, scored, and made recommendations for funding. Capacity investments ranged from \$17,500 to \$30,000 over a 12 to 18-month period, depending on the funding source. Out of twenty applicants, the following ten organizations received capacity investments:

- Central City Concern, Portland
- Community Partners for Affordable Housing (CPAH), Tigard
- Corvallis Neighborhood Housing, Corvallis
- Farmworker Housing Development Corporation (FHDC), Woodburn
- Hacienda Community Development Corporation, Portland
- Housing Development Corporation of NW Oregon, Hillsboro
- Human Solutions, Portland
- Portland Community Reinvestment Initiatives, Inc. (PCRI), Portland
- REACH Community Development Corporation, Portland
- St. Vincent De Paul, Eugene

These organizations own and manage over 5,000 units of affordable housing, nearly 40% of the entire CDC affordable housing stock in Oregon. It is estimated their programs reach a combined total of 130,000 individuals in six Oregon cities. All affordable housing residents were low-income, and 70% earned 30% or below of their area median income. The affordable housing residents were racially diverse, approximately 39.8% Caucasian, 38.5% Latino, 17.0% African American, 1.7% Native American and 1.1% Asian.

The CDCs' resident service programs varied, as each was developed to meet the specific needs of their residents. Services ranged from intensive case management for special needs populations to financial literacy and homeownership counseling. At an early project meeting, participants grouped the services that they provide into the following categories: Youth Programs, Leadership Development/Community Organizing, Housing Retention and Stability, Financial Literacy and Community Opportunity and Life Skills. A wide variety of activities fell under each general category.

Because the individual resident service programs were so diverse, the evaluation design was approached as an embedded case study. This method blended both a quantitative approach and a qualitative analysis. In addition to the agency case studies, the evaluation was structured to collect qualitative data from Executive

Directors, Property Managers, Resident Service Coordinators and affordable housing residents through interviews.

NPF and the evaluator worked with project participants to establish three areas of cross-site measurement designed to determine the broader effects of resident services. The measurements were: Housing Retention, Pride of Place and Community Connections.

ORGANIZATIONAL ACCOMPLISHMENTS

Each CDC identified two to three project outcomes that they hoped to achieve. These outcomes varied greatly, from strengthening internal systems to designing new programs to more effectively delivering existing programs.

“Resident services should be the doorway out of poverty and make the difference between just living in an apartment and self-sufficiency.”
Executive Director

The organizations had a total of 32 goals that were directly connected to their capacity investments. The participants successfully completed 30 of these goals. The majority of the groups retained or hired Resident Service Coordinators with the funds. These coordinator positions are extremely difficult to fund as they are not a typical “above the line” use of affordable housing development financing. The stable program funding allowed for participants to expand, increase impact and document their work. For many organizations, developing measurable goals and outcomes for the project gave them the opportunity to analyze and refine their programs.

“We were able to expand capacity to deliver services across all of our properties...and the project made us think about outcomes...made us more conscious about what we were doing.”
Resident Service Coordinator

Following is a sample of program accomplishments:(Individual organizational case studies can be found in the full evaluation report)

Central City Concern

- During the project period, 82% of the residents served by the Family Mentor supported by this project remained abstinent from alcohol and drug abuse.
- Of families being served by the Family Mentor, 70% retained their housing (a high number for this special needs population).
- 85% of the families remained intact and achieved unification with their children.

Corvallis CDC

- During the grant period, 88 families were identified as purchasing their home. During the previous year, 61 families were identified as moving into homeownership.
- Over the course of 51 days during the grant period, 149 low-income children were served 2,221 nutritious meals, which was an increase of nearly 32% over the previous year.

Community Partners for Affordable Housing (CPAH)

- During the grant period, CPAH was able to strengthen their resident service program by clarifying resident needs, developing clear program outcome measurements, and working towards an information management system to track outcomes.
- The non-scheduled maintenance cost rate per unit dropped 34% during the demonstration period.

Farmworker Housing Development Corp. (FHDC)

- FHDC provided computer skills training to over 70 residents, with 100% completion rate and an ability to move to the next level of training.
- During the grant period, FHDC was able to offer more after school programs. Over 70 children utilized their after school and homework club.

Hacienda CDC

- Because of project funding, Hacienda was able to hire a staff person who raised over \$500,000 for resident service programs. The small grant was able to leverage and strengthen the program dramatically. This would not have been available if she was not supported through this program.

HDC of Northwest Oregon

- During the grant period, the agency provided 5,319 hours of literacy instruction to over 191 students. These classes assisted residents to attain employment and improve their economic position.

Human Solutions

- As a result of additional program funding, an array of children's programs were developed and launched during the grant period. These programs included an after school program, homework club, parenting support, reading time for toddlers and an anti-gang program.

Portland Community Reinvestment Initiatives (PCRI)

- During the grant period, PCRI was able to assist 11 new homeowners and counsel 50 households for homeownership. Ten families began individual development accounts and are now saving for homeownership. Project funding was used to support a staff person to make this happen.
- Resident services staff held strategic planning sessions and were able to better connect their work with other organizational departments.

REACH CDC

- REACH's Youth\$ave program had one of its most active years. Twenty-one youth graduated, saved \$3,000, and completed 225 hours of community service. All of the participants stayed in school, opened a savings account within one month of orientation and increased their financial knowledge.

- During the grant period, REACH made 3,025 information and referral contacts.
- Forced move outs or evictions dropped from 22 in 2004 to 11 in 2005 in one of REACH's very low-income buildings.

St. Vincent De Paul

- With stable support, for cause evictions decreased by 20% during the grant period. Unit damage and exterior maintenance decreased by an average of \$10,000 per complex.
- Homework clubs were initiated during the grant period. They are offered twice a week at three sites. Students are taught by volunteer retired teachers, high school students and University Professors. Several students' grades have risen dramatically after attending the clubs.

Cross Site Measurements

It was important to develop several indicators of success or failure that could be applied to each participant organization despite the fact that program offerings varied widely. NPF worked with the participating agencies to develop the following three areas:

- 1) **Housing Retention** as measured by the number of move outs for positive

"There have been several program successes that have impacted the overall organization. We have seen a marked decrease in evictions and unit damages over the past year. While this was an anticipated result, it was nice to have it actualized" Executive Director

reasons such as moving to home ownership or unsubsidized housing, or negative outcomes including evictions or for cause move outs, and rental unit turnover costs;

- 2) **Pride of Place** as measured by maintenance costs related to vandalism or criminal acts and other non-scheduled maintenance costs; and,
 3) **Community Connection** as measured by resident participation in community activities, resident complaints, incident reports (internal to the agency), and crime reports.

Collecting this data turned out to be difficult, but achievable. Six agencies were able to demonstrate improvements in housing stability and move out rates, six agencies were able to demonstrate improvement in the community connection rate, and three agencies demonstrated reductions in resident complaints. While all of these results must be viewed with some caution, it is clear that there are demonstrable ways to link resident services to overall organizational performance and to impact areas that will matter to CDCs, their residents and the traditional funders of affordable housing.

TRAINING AND TECHNICAL ASSISTANCE

Trainings

Training and technical assistance was a critical element of the demonstration project. A tailored training series focused on building the skills and knowledge of current or new resident service coordinators. All trainings were led by national trainers. Eighty-three staff members attended the trainings and many staff attended multiple sessions. Training needs were assessed by a statewide survey of CDC staff and industry partners and training topics were generated through The Resident Services Network, a local peer group of Resident Service Coordinators.

"The trainings helped to change our thinking and the technical assistance reinforced putting training into application." Resident Services Manager

In response to the survey responses, the following trainings were held:

- Proving the Results of your Community Development Work
- Community Building and Organizing for CDCs
- Developing Strong, Culturally Competent Programs with Impact
- Working Collaboratively to Increase Impact
- Poverty in Oregon

Technical Assistance

Approximately \$13,500 was available for individual agency technical assistance to improve and enhance resident services. Because of limited funds, NPF established a formal application process that led to eight agencies receiving individual grants. Uses of the grant included financial support to send resident services staff to national trainings including The Enterprise Foundation's annual conference and NeighborWorks Resident Services Symposium. Both events provided staff with a valuable opportunity to network with other staff across the country. Other technical assistance topics included agency specific communication, mediation and conflict resolution skills building; understanding poverty and class issues to better identify needs and design services; avoiding staff burn-out; development of an agency specific community organizing manual; agency specific consultation and training for community organizing; assistance to develop mental health self-care and to implement community based health awareness using the Promotores model; and, program planning with evaluation for a specific property.

In general the trainings were very well received as were the opportunities provided by the flexible technical assistance funding.

INTERVIEW FINDINGS

Executive Directors

Executive Directors from all of the participating agencies were interviewed. All were very pleased to participate in the demonstration project and believe that resident services is an important function that adds value. A common theme emerged around the topic of staff selection, training and funding. The Executive Directors noticed that it takes a special type of staff person who often needs very specific training to be a successful Resident Service Coordinator. Sporadic funding makes it difficult to recruit and retain these types of individuals, particularly at relatively low salaries. For resident services to be successful the Executive Directors agreed that the program offerings must be well matched to the specific organization. There was a consensus that NPF's role of fundraising, technical assistance and evaluation was very valuable and would be a welcome ongoing function if resources were available to provide it. Many Executive Directors expressed doubt at their ability to raise funds for these programs as stand alone efforts. All of the Executive Directors expressed concern about likely cuts to services at all levels of government in the near future, which could put their residents under extreme pressure and make this strategy even more needed.

Resident Service Coordinators

Coordinators from all of the agencies took part in extensive interviews regarding the project. They were enthusiastic about both the demonstration project and their work. All showed dedication to their residents and most seemed to be well-integrated into the management structures of their organizations. The coordinators saw two primary benefits from the project. First, they reported that residents received more needed services. Second, their work and strategies received a great deal of attention, which helped to emphasize and clarify the need for resident services. Most of the coordinators took part in the trainings, which they found valuable for their content and as an opportunity to network with peers. All felt that NPF should play an ongoing role, particularly in the areas of fundraising and technical assistance in coordination with national efforts that are underway.

Property Managers

The Property Managers were the most pragmatic group interviewed. They focused on the relationship between resident services and their work with a common finding that well-trained resident service coordinators were a real asset. Most stressed the need for training and good communication. All saw value in well-run resident service programs, particularly if they were designed to intervene at the first sign of a problem. Not surprisingly, this group was the least knowledgeable of NPF's role, but did support further coordination and training throughout the industry. Property Managers consistently cited residents' increased community pride as a strong indicator of success, and one that affected the quality of their buildings and work.

"With the Resident Services Coordinator, we were able to get residents the needed services and keep them in housing." Property Manager

Residents

Residents expressed strong support for resident services. While they were pleased with a wide variety of program offerings, there was a particular emphasis on the nature of the relationship between the coordinator and the residents themselves. Residents were candid in expressing the difficulties that they face living in poverty. They very much valued having someone available to help solve problems. Many residents expressed a strong unwillingness to go to property management with problems, as it might lead to eviction. This statement on their part made it clear why resident service programs have been successful in improving the bottom line, as they allow problems to be solved before they become too large. The services most consistently mentioned as valuable included those that supported children, such as after school and summer programs, as well as those that stopped crime. The interviews underscored the need for consistent funding of resident services so that relationships of trust can be built and the resources are there when problems arise.

"My son was in the second grade when I moved in and has a learning disability. The children's program uses the same reading skills materials as his school and with tutoring he is now above his reading level in only 6 months. Additionally, I found help with food, emergency payment of my utilities, bus tickets, clothing for the kids, shoes, and backpacks for school." Resident

RECOMMENDATIONS

The following recommendations and suggestions are based on information extracted from the interviews, case studies and cross-site data. The evaluation team recommends:

Continue Funding CDC Resident Service Programs

Funding for CDC resident service programs is extremely difficult for individual agencies. However, stable core funding is critical to the success of programs. Without qualified staff members who can build long term-relationships, CDC resident service programs are not as able to create and sustain meaningful impact. Interview participants suggested that NPF was better positioned to seek funding for multi-agency projects such as the demonstration project.

Refine Measurements of Success

This evaluation attempted to collect data on a variety of services at each organization over a relatively short period of time. NPF should consider limiting or restricting the number of services to be evaluated in order to provide a richer documentation of impact. A clearly defined set of universal indicators with clear, easy to collect measurements should be identified at the beginning of the next phase of the project.

Offer Tailored Training and Technical Assistance and Connect to Other Training Opportunities

The training and individualized technical assistance was very well received. In addition to continuing to provide tailored training and technical assistance, NPF should consider connecting Resident Service coordinators and other

interested staff to any other national or local appropriate trainings. Scanning resources and passing this on to staff will expand the project's scope and leverage.

Assist in Improving Data Collection Systems

Effective management information systems were an extreme challenge for many organizations. This made it very difficult to track and evaluate outcomes. Resident service programs have not had the time, money or focus to develop effective information tracking systems. NPF could assist in funding and or technical assistance to provide the necessary technical systems to track outcomes.

Research Impact Longer with Fewer Organizations

A longer research study with a control group would allow for more cost-benefit analysis. This study should focus on fewer organizations that have infrastructure and demonstrated experience to support a rigorous study. These agencies should be well funded to support service delivery, data collection and analysis. Such a study should be three or more years to best document long term effect of the many services offered.

Advocate for Systems Change

NPF could be a central voice representing the CDCs at the state and national levels to advocate for adequate funding and support for CDC resident services. NPF could work to include resident services as a recognized operating cost of affordable housing properties. This would be a long-term process. Additional data and research findings from another phase of the project would help to strengthen the case.

CONCLUSION

The effort to date was a success. The first phase of NPF's Resident Service Demonstration Project energized the concept of linking affordable housing and services while producing professionally documented results. It is clear that well-crafted resident service programs, individualized to fit specific communities and led by trained and consistent staff, can be very effective in helping low-income residents reach their potential and CDCs improve their bottom line. If funding for the next phase can be secured there is a clear role for NPF to play as an intermediary. Fundraising, technical assistance, training, evaluation and advocacy will all be necessary to bring this promising but new strategy to its full fruition. It is clear that those roles cannot be achieved by each CDC individually and that the positive results of the first phase of the project warrant continued work. NPF now has the results and experience to justify the goal of systemic funding for resident services. The next phase should include directed work with affordable housing funders to explain the results of this project and build additional support. CDCs have proven that the resident services model works, and NPF is well-positioned to move the effort to the next level.