



CREATING OPPORTUNITIES FOR FAMILIES THROUGH RESIDENT SERVICES: A PRACTITIONER'S MANUAL

Volume One: Implementing a Basic Resident Services Program
Revised and Expanded Edition

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THE DESIGN PROCESS

Designing the process right from the start—understanding what your residents want, what services are appropriate for addressing their interests and how well they are doing along the way—increases the likelihood that your program will succeed.

INTRODUCTION TO THE DESIGN PROCESS

It will be much easier to design an effective resident services program—and to gain support for it from key stakeholders—if you address the right issues from the start. First, you will need to know your residents and what their goals are. You will also need to align your services with your organization’s mission and leadership objectives. And, you’ll need to have appropriate space available on site or very close to the housing development. You’ll need to know local service providers, their offerings, policies and track records. You’ll have to define success and ways to measure residents’ progress along the path to success. Then you’ll need to determine a budget for the services and your own staffing requirements and finally staff the position. All of that takes place before you launch your program.

This section will help you move through this process with a thorough understanding of your options. You will even find here the results of research on staffing, program and other operating costs based on a survey of seven resident services programs. Use these resources, as many or as few as will serve you. Read them for background or adapt them to fit your specific needs. We hope they will pave your path to success.

RESOURCES AVAILABLE IN THIS SECTION

- 1. Building Resident Services into the Housing Production Process:**
Use this document as a sample checklist to ensure that your organization does not overlook physical space needs and that you consider any property management issues related to occupancy when designing your resident services.
- 2. Designing and Establishing Space for Resident Services Programs:**
This document provides considerations and guidance for thinking through what space you will need, and how you could use it to your best advantage, when offering different types of resident programs.
- 3. Surveying Residents’ Characteristics, Goals and Interests:** For your resident services programs to succeed, it is imperative that you have a thorough understanding of your residents and their goals. The most efficient way to collect and analyze that information is through a resident survey. This document helps you think through designing your survey and analyzing your results.
- 4. Collecting and Analyzing Resident Data Using SurveyMonkey:**
Luckily, there are a number of low-cost survey-creation tools available online to assist you with this process. This document describes the cost and capabilities of one such tool, SurveyMonkey.

5. **Assessing Social Services for Resident Referrals:** Whenever possible, resident services coordinators should refer residents to existing services in the community, if they are effective and accessible, rather than providing services directly. This document provides information on the issues that your organization should consider when choosing outside service providers, including how to assess providers' effectiveness and how to build partnerships for resident referrals.
6. **Introduction to Microsoft® Excel-based Tool for Setting Targets for Program Success:** Enterprise has developed a Microsoft Excel-based tool to help in planning and setting targets as well as providing a framework for reporting outcomes. This document explains the design and benefits of the tool, which is available in the online version of this manual.
7. **Systems for Tracking and Verifying Outcomes:** It is important to develop systems for tracking the success of families and children receiving resident services to successfully manage your program and report results to stakeholders. This document explains the necessity for tracking outcomes and options for tracking them.
8. **Budgeting, Staffing and Other Benchmarks from Seven Organizations Offering Resident Services:** To provide guidance for resident services program planning, Enterprise supported research on the costs of operating a resident services program. The research included a review of the operations and budgets of seven nonprofit housing organizations with resident services programs. This document provides a helpful summary of their cost, staffing and other investments in their programs.
9. **Introduction to Microsoft Excel-based Tool for Budgeting Resident Services Programs:** To assist resident services coordinators and other program staff develop budgets, Enterprise has created a tool using Microsoft Excel that is easy to use and easy to customize to fit particular attributes of any program. This document explains the design and benefits of the tool, which is available in the online version of this manual. It also automates graphic illustrations of your budget information.
10. **Components of the Job and Attributes for Success as a Resident Services Coordinator or Program Manager:** At the core of every resident services program is the resident services coordinator. This document describes the job and the attributes necessary for success in this job.
11. **Sample Job Description for a Resident Services Coordinator:** Use this document as a guide for creating a job description for your organization.
12. **Using Americorps to Help Your Resident Service Team:** This document describes how resident services programs can use Americorps to help with their staffing needs.

ONLINE RESOURCES

<http://www.enterprisecommunity.org/resources>: The Practitioner Resources section of the Enterprise website contains the online version of this manual. Nonprofit users can download sections of the manual to adapt for use by their organizations in delivering resident services programs.

<http://www.residentservices.org>: Website of the National Resident Services Collaborative which is comprised of several national, regional and local community development organizations. It was established to improve and increase the delivery of resident services for families in affordable housing. Members are Enterprise; NeighborWorks America; The Community Builders; Mercy Housing; the American Association of Service Coordinators; Housing Partnership Network; National Church Residences; Preservation of Affordable Housing of Boston, Massachusetts; Community Preservation and Development Corporation of Washington, D.C.; REACH CDC of Portland, Oregon; the Neighborhood Partnership Fund in Portland, Oregon; and the Alamo Area Mutual Housing Association in San Antonio, Texas.

<http://www.nw.org/learningcenters>: Website of the NeighborWorks Learning Center Consortium, a demonstration program including 22 community-based nonprofit organizations operating active Learning Centers at their properties to delivery amenities and services to residents of affordable apartment properties.

<http://servicecoordinator.org>: Website of the American Association of Service Coordinators (AASC), a national nonprofit organization representing service coordinators serving families, the elderly, persons with disabilities and others who are involved in creating and maintaining service-enhanced housing environments. AASC also offers <http://www.AASOnline.org>, Web-based software for managing resident services for seniors and families.

<http://www.tcbinc.org>: The Community Builders has prepared a practitioner's guide, "Resident Success in Economically Integrated Socially Diverse Housing," by Patrick Costigan and Leo Quigley, to share ideas and resources on effective practices in developing mixed-income, mixed-race housing. The guide is based on their own experience and the work of other developers and researchers. http://www.tcbinc.org/what_we_do/ci_practice_tools.htm

BUILDING RESIDENT SERVICES INTO THE HOUSING PRODUCTION PROCESS

In order to ensure that your resident services program fully meets your residents' needs, there are many issues that you need to consider during each step of the affordable housing production process. Use this document as a sample checklist to ensure that your organization does not overlook physical space needs and that you consider any property management issues related to occupancy when designing your resident services.

PLANNING OR PREDEVELOPMENT PHASE

- Identify the target population that the proposed development will serve.
- Review the building and property concept and design and its appropriateness for serving the target population. Consider the ability to deliver desired services on-site, including space for classes/workshops, after-school activities, computer labs, resident meetings and community building activities, as well as staff office space.
- Secure a commitment from the organization's leadership to provide chosen services.
- Conduct a general needs assessment of the target population.
- Initiate contact with local service providers and begin assessing the quality of their services.
- Identify other community assets and resources that could benefit residents.
- Help the development team to design facilities and space for programs, including involving potential external service providers in design discussions.
- Build support in the community for the new housing.

CONSTRUCTION PHASE

- Continue to assess potential service providers and negotiate for service arrangements.
- Assess gaps in existing services and develop plans to address them with on-site services as appropriate.
- Begin fundraising to support on-site services.
- Attend construction meetings regularly to monitor work progress and any design changes. Use this as an opportunity to process change orders if changes are needed to meet the residents' needs or to deliver services on-site.

- Finalize basic resident services program design, including clearly delineating duties between property management and service staff.
- Develop resident orientation materials that include information about quality neighborhood services.
- Establish resident screening and selection criteria.
- Identify funding sources for services not readily available.
- Hire services and property management staff.
- Set up systems for tracking and reporting on outcomes for families and properties.
- Conduct joint training sessions for resident services and property management staffs.

OCCUPANCY PHASE

- Work with property management staff to screen and select residents.
- Develop resident goals and formats for action plans if the population being served warrants this level of service.
- Conduct a detailed survey of residents' goals and interests.
- Finalize the resident services' plan and budget.
- Develop a formal and informal network of service providers.
- Set targets for success of resident services for families and for property management.
- Implement resident services program.
- Evaluate outcomes of service delivery for families and properties.

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DESIGNING AND ESTABLISHING SPACE FOR RESIDENT SERVICES PROGRAMS

Whether you have the relative luxury of planning ahead for space for your resident services or you are trying to retrofit space into an already operating property, your need for space will vary depending on what your program will be offering. This document will help you to plan for and design the space you will need to run your resident services program.

GENERAL DESIGN CONSIDERATIONS

Your buildings serve first and foremost as housing, but can also provide places that are important for the growth of individuals, families and the community. Your organization should have a clear vision of what your resident support and community involvement goals are in order to have ideas about what your space needs will be. Be sure to plan for these space needs in the physical design phase of your housing development. Even if you don't have the funds to finish a potential community space, you should attempt to rough out the plumbing and electrical systems in anticipation of future use to reduce costs of retrofitting for these systems. The design should also consider the necessary insulation and windows based on both the immediate and potential uses of the room.

First, resident services coordinators need an office or other private space to meet with residents. Even if the resident services coordinator has an office in another building, there should be a small office space or meeting area on-site at as many of the properties served as possible. Moreover, it is desirable to have an on-site community room for group meetings or classes, with as much storage space as you can manage. Many resident services coordinators recommend a minimum of 1,000 square feet of space to serve programs for families in 100 to 160 units.

A larger space will allow you to create additional areas for computer centers, activities, meeting rooms or offices. You may also be able to run programs from within your organization's main office if it is close enough to your properties and transportation is available. Finally, if you can, install a kitchen space or even a counter and cupboards on one side of the room with a sink and refrigerator to be able to provide refreshments at community gatherings or snacks for children in after-school programs.

Active and successful group environments or spaces can bring the community in, draw the residents out and establish a positive identity and presence for your organization. You can use your program space for specific programs to foster tenant, youth and community involvement; after-school and job readiness programs; and green spaces or playgrounds.

If sufficient space was not provided in developing your housing, consider converting or expanding existing community space. A property in Washington,

D.C., came up with a creative solution to their need for more space for a technology center for residents. They had a useable but small ground floor space to use as a community room, with a back door out onto the driveway. The property also had nine adjacent garage spaces along the asphalt drive, leading to the exit door of the community space. With support from resident families, the property owner converted the three closest garage spaces into a computer training space combined with the existing space, and turned the last part of the driveway into a gated, outdoor play space for the younger children.

Housing with storefront commercial space could reuse the space for services if proximity and neighborhood conditions are conducive to this use and if rental income is not needed to help cover debt service.

REGULATION REQUIREMENTS

Keep in mind that the amount of space that you can dedicate to a resident services program office may be limited by the bottom line of available housing financing and funder requirements for the maximum number of housing units. However, do your best to provide for as much space dedicated to your resident services program as you can. If, for example, you are developing a new Low-Income Housing Tax Credit project, try to maximize the allowance for community space. Talk with your housing development staff and tax credit syndicator for more information about space for resident services as early in the project as possible.

For a multifamily building, community and program spaces may be located in an unused ground floor unit or in finished space in a property's basement. Be sure to adhere to all local zoning or building code laws about the number of exits, plumbing, drainage, lighting, etc., especially with basements and other below-grade spaces. Of course, if any of your programs that will use the space receive government funding, such as after-school or child care classrooms, or are under any other regulatory requirements, you must adhere to local child care, health department, or other regulations. Some groups with multiple buildings on larger tracts of property or in a closely situated scattered-site project are able, with enough planning and fundraising, to develop a small, separate community space or building.

SPACES FOR ADULT PROGRAMMING AND COMMUNITY RECREATION

You can use community and resident coordinator office space for specific adult and community recreation programs; building, tenant or community meetings; educational or physical fitness classes; cooking and nutrition classes; computer centers; public social events or private parties. Based on these various uses, you should be sure to have plenty of space to set up chairs and tables; a good place to store the chairs and tables when you want the space open; counter space for materials, food or displays and plenty of locked storage space for materials, videos and audio equipment. Again, think ahead about how you want to use your space, maximize the room size and storage capacity as best you can and plan accordingly.

SPACES FOR YOUNGER CHILDREN

The physical environment can be an asset or a barrier to the development of high-quality programming in many after-school child care programs. Children need a space that can be designed and decorated to reflect their needs, concerns and personalities.

The necessity of sharing space with other programs is a fact of life for many before- and after-school child care programs. It may be difficult for children to develop a sense of ownership of a place that is not solely theirs. If you must share, try to find a compatible program. Many programs have devised strategies to make the best of the situation. Keep in mind that it is extremely difficult to serve school-age children's needs in a large space with few boundaries. If children are having behavior problems, inadequate or poorly designed space may be at the root of them.

Therefore, when creating spaces that will serve school-age children, consider these questions:

- Does the space support the goals of your program?
- Does the space feel inviting?
- Does the space work for the number of children in the program?
- Does the space allow for individual activities and privacy, as well as small- and large-group activities?
- Does the environment encourage communication among parents, children and staff?
- Is the environment safe?
- Does the environment support key activities, such as quiet games, homework, dramatic play, eating, active group games, cooking, reading and specialty clubs?
- Does the environment work for you and your staff?
 - Is there a good amount of light?
 - Is there a place for sick children?
 - Is there room for adequate and age-appropriate games and equipment?
 - Is the storage space adequate and workable? (Overbuild storage space wherever possible; you can never have too much.)

SPACES FOR OLDER CHILDREN AND YOUNG ADULTS

Adolescent mental and emotional well-being is associated with teens' environments. Welcoming, safe and productive youth spaces have been proven to make a positive contribution to young adults' development, growth and sense of self. Further, the more separate the older children's or youth program spaces are from the younger school-age children's programs, the greater the likelihood of success.

Separate space, like separate program names, permits the participants to have a sense of autonomy. It facilitates their developmental need to see themselves as having moved beyond early childhood. Separate space permits young people to

decorate their own place as their more mature tastes dictate. They can equip the room with materials, games and equipment that suit their own developmental levels and personal interests without the concern of inappropriate use by the younger students.

Environments used by older school-age children should:

- Be designed and decorated by the students themselves. Solicit their input and participation. Let them help order, purchase and equip the space and maybe even help to fundraise for set-up or maintenance.
- Permit access for the older students to certain shelves or storage areas that are for their “stuff” alone, especially in multi-use rooms.
- Be equipped with materials, games, tables and chairs appropriate to the participants’ ages, developmental needs and interests.
- Provide opportunities for private areas where participants are not always under the direct supervision of adults. Use of dividers or even draperies can help provide this sense of special space.

Spaces that are inviting and comfortable for teens and young adults will encourage them to hang around even when there are no specific activities scheduled.

TIPS ON SHARING SPACE

Here are some tips for making the best use out of multipurpose rooms:

- Purchase or build adaptable equipment: portable room dividers, locked storage closets, chairs, cabinets, tables and even sofas on wheels.
- Include set-up and take-down time in the daily routine. This may include hanging pictures on the wall, putting materials out on tables, rolling out rugs and moving or rolling in soft furniture.
- Make sure there is clear agreement about where each program will store equipment and supplies, who will clean the space and the process for working out any conflicts that may arise. Regularly scheduled meetings, perhaps at the beginning and end of the school year, can help to clarify issues before they arise as problems.
- Develop “learning centers on wheels” for art, library, dramatic play and so on. Small rugs will help to establish boundaries between activity centers.
- Separate program space—space that offers a sense of separateness—in a shared area can be created through scheduling exclusive use times for some portion of the day or a particular day each week. Non-program space—such as an unused storage room, a corner of a room that can be partitioned off or an unused hallway—can be set aside at certain times, and made functional using easily moveable furnishings and partitions.

Space is an important contributor to all young people's ability to relax, learn and grow. Consider it carefully as you design your programs, and try to allow for as much flexibility as possible.

OUTDOOR SPACES

Backyards or side-yards, whether grassy or concrete pads, can be transformed into play areas, sitting areas for conversation or places to hold messy outdoor activities. Empty lots adjacent to the properties or nearby can be transformed into community gardens, parks or additional recreation space. It is best to acquire any such property if your organization doesn't already own it to ensure the continued use for the community. If that is not an option, however, be sure to establish a clear legal agreement with the private or public owner of that land before using it. Finally, take advantage of local public green and recreation spaces; talk with your local parks board about programming. More information on developing community gardens is available in an Enterprise publication called "Neighborhood Green: A Guide for Community-based Organizations." To view or download a PDF copy of that publication, go to <http://www.enterprisecommunity.org/resources>, and look under the left navigation for Enterprise Resource Database. Then search for "Neighborhood Green."

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SURVEYING RESIDENTS' CHARACTERISTICS, GOALS AND INTERESTS

For your resident services programs to succeed, it is imperative that you have a thorough understanding of your residents and their goals. The most efficient way to collect and analyze that information is through a resident survey. The results of your resident survey will help you to determine when to develop partnerships with area service agencies that you can refer residents to and when to provide services on-site.

DEVELOPING SURVEY CONTENT

Surveys should contain questions on the number of people living in each housing unit as well as residents' education levels, job status, ages and interests. Responses to questions about education level can indicate the need for after-school programs and adult education classes. Responses to questions related to employment status can indicate the number of residents who are underemployed or unemployed and need assistance with career development or job placement. Asking about residents' interests can help you to plan for on-site speakers or workshops on personal growth that cover such topics as parenting, money management or conflict resolution. For specific examples of questions to include on resident surveys, see the sample that follows. You can photocopy the survey directly and use it as written or download and customize it through the online version of this manual, which can be found at <http://www.enterprisecommunity.org/resources>.

ENCOURAGING RESIDENTS TO COMPLETE SURVEYS

It is always challenging to persuade residents to complete surveys or questionnaires about their needs and interests. One hundred percent participation is ideal but unlikely. Some residents may not be willing to share personal information regardless of the incentives. However, other residents simply need to be convinced that completing the survey is worth their time. Here are some strategies for encouraging residents to complete surveys:

- Personally ask residents to complete the survey to help you plan services that will benefit them and their children.
- Help residents fill out the survey through one-on-one interviews.
- Provide residents with the option to complete the survey electronically.
- Offer incentives for completing the survey, such as a prize drawing.
- Provide refreshments and child care on-site when administering the survey.

ANALYZING SURVEY RESULTS

If you need to survey a large number of residents or use a survey with dozens of questions, consider developing an electronic survey that residents can complete either online or through email. This will enable you to analyze the results more efficiently. One way to accomplish this is to use a Web-based software tool such as SurveyMonkey, which facilitates analyzing surveys. With SurveyMonkey, residents can either complete the surveys electronically or on paper and resident services staff can enter and analyze the results online. You can read more about SurveyMonkey in [Collecting and Analyzing Resident Data Using SurveyMonkey](#).

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RESIDENT SURVEY

To help us better serve you, please take a few minutes to complete this survey. The information you provide will help us to plan programs to support you and your family.

1. Which of the following describes your household?
- Two parents at home
 - One parent at home
 - Other, specify: _____

2. What is the primary language of your home?
- English
 - Spanish
 - Other, specify: _____

3. What is your race or ethnic background?
- African American
 - Hispanic
 - Caucasian
 - Other, specify: _____

4. Have you taken and passed any English as a Second Language (ESL) courses?
- Yes
 - No
- If yes, what level? _____
- Beginners ESL test _____
- Intermediate ESL test _____

5. Family Information (List all members)

(For education level, please use the codes from the chart below.)

Name	Gender (M/F)	Age	In Child Care (Y/N)	Education Level (chart below)	Employed (Y/N)
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

Education Level

- 1 1st through 8th grade
- 2 9th through 11th grade
- 3 High School Diploma or GED in United States
- 4 High School Diploma or GED outside of United States
- 5 Some college
- 6 Associate of arts or two-year degree
- 7 Bachelor of arts or four-year degree

6. What resources and services would you like to have in your community? _____

7. What recreational activities would you like to have available here? _____

8. What types of training and educational programs are you interested in? _____

9. What, if any, are your concerns about safety in your community? _____

10. How safe do you feel in the following areas?

Please use the following scale:

- 4: You feel very safe.
- 3: You feel mostly safe.
- 2: You feel somewhat safe.
- 1: You don't quite feel safe.
- 0: You do not at all feel safe.

___Your building ___The children's play area ___Your neighborhood

11. How much would you benefit from programs and activities for the following?

Please use the following scale: from 4, meaning you would greatly benefit, to 0, it would be of no benefit to you.

	Great benefit			No benefit at all	
Seniors (56 years or older)	4	3	2	1	0
Adults (21-55 years old)	4	3	2	1	0
Young adults (14-20 years old)	4	3	2	1	0
Children (5-13 years old)	4	3	2	1	0
Toddlers (4 years or younger)	4	3	2	1	0
Infants (birth to 3 years)	4	3	2	1	0
At-risk children/ youth	4	3	2	1	0
New immigrants	4	3	2	1	0
Abused children	4	3	2	1	0
Abused adults	4	3	2	1	0
Ex-offenders	4	3	2	1	0

	Great benefit			No benefit at all	
Parents with children in prison	4	3	2	1	0
Children with parents in prison	4	3	2	1	0
Those who lost loved ones to violence	4	3	2	1	0
Other _____	4	3	2	1	0

12. If we had programs and activities for the groups listed above, would you or your family participate?

Yes No

If yes, which group's activities would you be interested in? _____

If no, please explain why you would not participate. _____

13. Do you think the community would benefit from activities or programs in the following areas?

Please use the following scale: from 4, meaning the community would greatly benefit, to 0, it would be of no benefit to community.

	Great benefit			No benefit at all	
After-school	4	3	2	1	0
Pre-school	4	3	2	1	0
GED	4	3	2	1	0
Computers	4	3	2	1	0
Arts and crafts	4	3	2	1	0
Parenting	4	3	2	1	0
Life skills	4	3	2	1	0
Budgeting and banking	4	3	2	1	0
English as a second language	4	3	2	1	0
Literacy	4	3	2	1	0
Job readiness skills	4	3	2	1	0
Small business development	4	3	2	1	0
Housekeeping	4	3	2	1	0
Health	4	3	2	1	0
Nutrition and cooking	4	3	2	1	0
Alcohol and drug abuse prevention	4	3	2	1	0
Domestic violence prevention	4	3	2	1	0
Anger management	4	3	2	1	0
Conflict resolution	4	3	2	1	0
Other _____	4	3	2	1	0

14. If we offered any of the above training or educational programs, would you and/or your family participate?

Yes No

If yes, which group's activities would you be interested in? _____

If no, please explain why you would not participate. _____

15. Would you be interested in helping develop and provide community activities?

Yes No

16. If your family has any immediate or long-term needs that you would like our help with, please describe them here. _____

17. Describe the physical condition of your previous housing. _____

18. Describe neighborhood resources and services that were available in your last neighborhood. _____

19. What attracted you to this neighborhood rather than another neighborhood? If you can't think of anything specific, please tell us what would attract you to a particular neighborhood. _____

20. Optional

Name: _____

Unit #: _____

Thank you for completing this questionnaire and helping to make a difference in our community.

COLLECTING AND ANALYZING RESIDENT DATA USING SURVEYMONKEY

In order to plan a resident services program, you need to know about your residents' characteristics, interests and goals. Collecting and analyzing this data, however, can be arduous and time-consuming if done manually. Luckily, there are a number of low-cost survey-creation tools available online to assist you with this process. SurveyMonkey, which was developed by SurveyMonkey.com LLC, is one such tool.

With SurveyMonkey, anyone can easily and quickly create professional, online surveys. You only need an Internet connection and a Web browser (such as Internet Explorer) to access and use the tool. The SurveyMonkey application will help you to design surveys, collect responses and analyze results directly from the website at: <http://www.surveymonkey.com>.

You can use SurveyMonkey for \$19.95 per month or \$200 per year. Because it is a Web-enabled application, you do not need to purchase any additional hardware. Technical support is available 24 hours a day, 365 days a year.

Here is some information on SurveyMonkey's key features, which are comparable to similar online survey-creation tools:

DESIGNING SURVEYS

Users can choose from a number of question types to design a survey that meets their unique needs. In addition, you have complete control over the colors and layout of your survey. To control the flow of the survey, you can incorporate logic into the response.

For example, you may be asking residents if they have children under the age of 10 and the name and grade level of each child. If the respondent indicates the presence of one or more children, you would design the survey to move that respondent to another series of questions that asks them to enter the name and grade level for each child. The respondents that have no children would bypass that extra series of questions and move on to the remainder of the survey.

COLLECTING RESPONSES

When performing surveys, a significant amount of time and effort is often required to wade through and consolidate paper or email responses. Using SurveyMonkey, you can simply cut and paste a link to a survey onto a website or within an email message to potential respondents. SurveyMonkey also uses a "pop-up invitation generator" to maximize the response rate from your website. After you create the pop-up invitation to the survey, you can copy and paste the code to a page on your website and start generating invitations, which will only

pop up once. SurveyMonkey also uses an automated email notification and list management tool to track survey respondents.

ANALYZING RESULTS

The software aggregates data and allows users to view results as they are collected in real time in tables, graphs and charts, as well as individual responses. A filtering feature allows you to block access to confidential data and display only the responses desired. The raw data can be downloaded for further presentation options and analyses.

For more information about SurveyMonkey, go to: <http://www.surveymonkey.com>.

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ASSESSING SOCIAL SERVICES FOR RESIDENT REFERRALS

Every group of housing residents has unique assets, interests and goals. As a result, there is no cookie-cutter design for resident services. There are, however, common elements. For example, at the core of every resident services program is a service coordinator who assesses available services in the community and then builds relationships with the best providers. This enables residents to access the services they need and want. These relationships between the resident services coordinator and the service providers can be informal or formal. More formal relationships may be memorialized in agreement letters or memoranda of understanding between service providers and affordable housing owners.

Service agencies that have a shortage of physical space or serve more clients in order to fulfill their goals may even be interested in providing services on-site at the affordable housing development. In some cases, it may be advantageous for housing providers to undertake joint fundraising efforts with agencies that provide services to their residents.

Whenever possible, resident services coordinators should refer residents to existing services in the community rather than providing services directly. Direct service delivery places financial and organizational burdens on community development organizations. Therefore, service coordinators should focus first on identifying and working with local service experts, rather than trying to become the experts themselves.

Of course, your organization may wish to directly provide select services to your residents in order to fulfill your organization's mission. Or, perhaps the services needed are not readily available in your area. If you decide to provide services directly, be sure that your board supports your decision. Also, make certain that you have or get the proper expertise in-house, that you are organizationally structured to handle the work and that you have the capacity to secure government contracts and privately raise funds to operate your programs.

This document provides information on the issues that your organization should consider when choosing outside service providers, including how to assess providers' effectiveness and how to build relationships for resident referrals.

SERVICE TYPES

The first step for any resident services coordinator is to learn about the different service types that residents may need or want. Review the following list of services and think about how each service might help to meet your residents' needs.

Education

- After-school/educational support for children
- Adult basic education/literacy/GED
- English as a second language
- Adult continuing education

Employment

- Work skills training
- Soft skills training
- Job placement
- Ex-offender/adult re-entry

Child Care

- Finding and keeping quality child care
- Pre-school education

Youth and Teens

- Athletics, arts and other recreation activities
- Support for staying in school

Building Personal Wealth

- Self-sufficiency, asset building
- Financial literacy
- Homeownership counseling

Family Services

- Family case management
- Parenting education, parenting support
- Domestic violence
- Drug treatment
- Emergency rental or utility bill assistance

Public Safety, Community Improvement

- Community organizing
- Police relations
- Anti-gang work
- Conflict mediation
- Recreation activities
- Block improvements

Health Care

- Community health centers
- Funds for health care

IDENTIFYING AVAILABLE SERVICES

Create a chart of the local agencies that provide services for each category in the above list. Your chart should include:

- Who provides which services
- Where each organization is located and available transportation to that location
- Participant eligibility requirements
- How the services are offered (through classes, one-on-one counseling, etc.)
- Cost and fees, if any (fixed, sliding scale, donations only) and payment methods (client payment, Medicaid, Medicare, private insurance, etc.)
- Hours of service
- Staff-to-participant ratios
- Referral methods accepted (appointments, walk-ins, referrals required)
- Availability of services (waiting list, length)
- Documentation required for receiving services
- Languages spoken

Here are some resources that you can use to find the needed information:

- Word of mouth
- Directories published by your local human or social services agency
- Directories published by local community service agencies or foundations, such as the United Way. To find your local United Way, go to: <http://www.unitedway.org>. If your community is implementing a United Way-sponsored 211 system, you will have access to an extensive list of local resources. To find out if your community participates, dial 211 or go to: <http://www.211.org>.
- Yellow Pages

ASSESSING THE OVERALL QUALITY OF EXISTING SERVICES

Before deciding which service providers you should refer your residents to, you need to assess each provider's effectiveness. Here are some general questions to consider when assessing a service provider:

- What is its reputation?
- Is it well-staffed? What is its staff's credentials?
- Is it willing to collaborate with other organizations?
- How long has it been in business?
- Who is on its board?
- What are its funding sources and history?
- What do other service providers say about the organization?
- What do your residents and others in the community say about it?
- What do public and private funders say about the organization's performance?
- How does it track and measure successes and outcomes?
- What are its outcomes and successes?
- Can it provide copies of internal and external evaluations?

Depending on the specific services provided, there are additional factors that you should consider when assessing the quality of an organization's services.

DEVELOPING PARTNERSHIPS WITH SERVICE AGENCIES

Once you have decided which organizations to work with, you have a number of options concerning the type of relationship that you form. When deciding how to set up the relationship, consider these points:

- Existing partnerships that you can expand upon
- Informal referrals
- Letter commitments for delivering services
- More formal memoranda of understanding (MOUs), service agreements
- How the organization tracks referrals and gets feedback from clients

ASSESSING THE SPECIFIC QUALITY OF SERVICES

Because the types of services available vary greatly, there are service-specific issues that you need to address when evaluating existing services. Listed below are some questions to consider when evaluating specific service areas, as well as ideas on resources for locating this information. Bear in mind that these are general questions and resources and your overall goal is to find as much information as possible on each service provider and the services it offers.

Education (children)

Specific questions to address:

- What is the teacher-to-student ratio?
- What are the teachers' qualifications?
- What activities are offered?
- What are the hours of operation?

Potential information sources:

- Public school systems
- Parks and recreation programs
- Churches
- Nonprofit community organizations

Education (adults)

Specific questions to address:

- What are the hours of operation?
- How are the students taught and assessed?
- What are the teachers' qualifications?
- Are the classes overcrowded?
- Are classes divided accurately by student level?
- Are current students making progress?

Potential information sources:

- Workforce agencies
- Community colleges

Employment (work and soft-skills training, job placement)

Specific questions to address:

- What target population does the program serve?
- What support services are offered while students are in training and after they have found work?
- Is it strictly job placement or are educational and vocational services also provided?
- What is the program's philosophy?

Potential information sources:

- Local Workforce Investment Board
- State employment department

Employment (ex-offender services)

Specific questions to address:

- When does the program begin working with clients?
- How long does the program work with clients?
- Does the program have connections with the parole system?
- What services (i.e., legal, physical and mental health, employment, etc.) are offered and how intense are these services?
- Does the program have connections with employers or landlords willing to work with ex-offenders?

Potential information sources:

- Workforce Investment Board
- Regional office of the Department of Justice

Child Care

Specific questions to address:

- What is the caregiver-to-child ratio?
- If it is a home-based setting, is the provider registered?
- What kind of training has the provider received?
- Is there a calendar of activities?
- Is there a menu of the food served?
- Do the parents speak highly of the provider?

Potential information sources:

- Local Child Care Resource and Referral Agency (<http://www.childcareaware.org>)
- Local government child care bureau

Family Services (parenting education and support)

Specific questions to address:

- Does the program offer special support for single parents?
- What are the hours of operation?
- What types of programs and activities are offered?

Potential information sources:

- County services
- Social service agencies

Family Services (case management)

Specific questions to address:

- What is the intensity level of the services provided?
- What are the counselors' credentials?
- What are the hours of operation?
- Are the counselors overloaded with cases?
- What range of services will the counselors help a family coordinate?

Potential information sources:

- Social service agencies
- Mental health agencies

Family Services (domestic violence)

Specific questions to address:

- What are the counselors' credentials?
- What is the range of services offered?
- Does the program focus on strength and empowerment?
- Is the program only focused on women in shelters or women who have left their homes or will it also help women who are currently with their batterers?
- What other services (i.e., legal, physical and mental health, employment, etc.) are offered?

Potential information sources:

- County government
- Domestic violence shelters

Family Services (drug treatment)

Specific questions to address:

- What is the program's philosophy?
- What after-care support is offered?
- What are the counselors' credentials?
- What is the range of services provided?

Potential information sources:

- County drug treatment agency
- Mental health agencies

Public Safety, Community Improvement (community organizing)

Specific questions to address:

- What is the actual community involvement?
- What are the decision-making and governance structures?
- How are priorities determined?
- What strategies are used?
- What is the program's relationship with the local police precincts?

Potential information sources:

- Community action agencies
- National Organizers Alliance (<http://www.noacentral.org>)
- Regional Department of Justice

- National Crime Prevention Council
- Local police department

Public Safety, Community Improvement (conflict mediation)

Specific questions to address:

- What is the program's philosophy?
- What are the requirements for using the program's services?

Potential information sources:

- City neighborhood involvement groups
- National Association for Community Mediation (<http://www.nafcm.org/>)

Building Personal Wealth

Specific questions to address:

- Does the program address the needs of individuals with limited English or literacy skills?
- What knowledge does the program assume a new participant will have?
- What are the program's goals and expectations?
- Does the program help individuals to repair bad credit, lower their debt and begin to save?

Potential information sources:

- Individual development account (IDA) programs
- Home-buyer counseling programs

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INTRODUCTION TO MICROSOFT® EXCEL-BASED TOOL FOR SETTING TARGETS FOR PROGRAM SUCCESS

To help resident services managers set bold but doable targets for program success, Enterprise has developed a Microsoft Excel-based tool to help in planning and setting targets. By entering relevant information about each program into the spreadsheet, a resident services coordinator can see which programs have the most potential participants. You can look at baseline information or review similar programs' experience to determine which programs will likely have the most participation and the most positive outcomes.

This tool is also designed to provide a framework for reporting program outcomes to affordable housing stakeholders. Tools designed to track outcomes and the effectiveness of programs are included in other sections of this manual. Below is a sample of the tool with definitions for the various data fields.

The following are definitions for the data fields:

- **Number of Potential Participants:** Based on surveys and discussions with residents, this is the total number of residents that could participate in the program.
- **Target Number of Participants:** Based on the previous column and the capacity of the program, this is the ideal number of participants for the program.
- **Target Number of Those Achieving Outcomes:** This is the number that you expect to achieve, the pre-defined level of success in the program.
- **Define Successful Outcome:** This is a description of what qualifies as success in this program. See examples in the chart below.
- **Number of Participants Completing Program:** Actual number of those completing the program.
- **Number of Participants Achieving Success:** Actual number of those achieving the successful outcome.
- **Percent of Target Achieved:** Calculation of the number who achieved the outcome divided by the target number for achieving outcome.
- **Verification Method:** What is used to verify the successful outcomes? Examples are test scores, report cards, improved credit scores, etc.
- **Period of Performance:** What is the period of performance, a month, six months, school year, full year? This depends on the program and its participants.

<i>Program Name</i>	<i>Number of Potential Participants</i>			<i>Target Number of Participants</i>	<i>Define Successful Outcome</i>	<i>Number of Participants Achieving Outcomes</i>			<i>Percent of Target Achieved</i>	<i>Verification Method</i>	<i>Period of Performance</i>
ESL	85	25	20	Mastery of ESL level	22	18	90%	Test scores	September – December		
After-School Tutoring	39	20	15	Improved grades	18	18	120%	Report cards	September – January		
Financial Literacy	85	30	20	Improved credit scores	20	10	50%	Credit scores from website	September – March		

This Excel-based tool is available for downloading and customizing through the online version of this manual, which can be found at <http://www.enterprisecommunity.org/resources>.

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SYSTEMS FOR TRACKING AND VERIFYING OUTCOMES

For reporting to stakeholders as well as for making the case for funding for effective resident services, it is critical for organizations to track both the outcomes of families and children served by resident services programs as well as the performance of the property. This can be done through a dozen key indicators of success (as discussed earlier in this section). Organizations have several options for implementing tracking systems, including software applications designed for this purpose, such as Family Metrics or Efforts to Outcomes, or it can be customized with a spreadsheet application, such as Microsoft® Excel. Enterprise has developed such a tool, and an introduction to that tool can be found in the Service Referral, Partnerships and Outcomes Management section of this manual. The tool itself can be downloaded and customized from the online version of this manual, which is available at <http://www.enterprisecommunity.org/resources>. However, with a little time and a basic understanding of the software, an organization can design its own outcome-tracking spreadsheet.

In the case of most resident service programs, a combination of on-site programs and referrals to off-site agencies and programs address residents' service needs. In most cases, referrals are coordinated with the off-site agency, and it is beneficial to outline the terms of this relationship in a formal document, such as a contract or a memorandum of understanding. Outcomes-tracking protocol should always be a part of that memorandum. However, regardless of which entity is responsible for officially tracking referrals and outcomes, resident services coordinators should collect at a minimum the following information when processing a resident's request or referral:

- Resident identification
- Resident request or goal
- Assistance or referral details
- Referral agency name and contact information
- Date referred
- Referral outcome and date

To be sure, a wider array of information will be necessary when attempting to analyze programs, outcomes, agency performance and other factors important to your organization and funders. However, this is only a baseline list, and more extensive collection information can be found in the Service Referral, Partnerships and Outcomes Management section of this manual.

When developing your systems, first decide what should be tracked. Determine the information necessary to measure the success of your program or your partner agencies' programs. Once this is determined, the type of system to use depends upon how detailed the tracking needs to be. If a program involves mul-

tiple resident services coordinators working at different properties and includes multiple on-site programs, specialized outcome-tracking software may be ideal. However, if the program is relatively small and cost is a strong consideration, then a spreadsheet tool will probably be the best solution.

SPREADSHEET TRACKING TOOLS

Tools like Microsoft's Excel are advanced computer-based spreadsheet applications that combine power and flexibility with ease of use. The greatest advantage of using any computer-based spreadsheet tool, as opposed to collecting data with pen and paper, is that such applications are specifically designed to manipulate data, and therefore allow users to change, update and reconfigure information in ways paper filing does not allow. Excel can hold more than 65,000 rows and 250 columns of data within a worksheet. Although there is room for a lot of data, one should be mindful that spreadsheet applications are not designed to be used as repositories for very large and complex data sets; in such instances, a database application is preferred.

As a tool for manipulating data, Excel uses special commands, known as functions, to quickly perform calculations. With several mathematical, statistical and financial categories to choose from, functions extend the power of Excel and can be used to make complex operations extremely simple. Moreover, using this feature is essential when analyzing data. Finally, once the data have been aggregated, Excel offers myriad choices for quickly representing key information graphically, making it easier to report on outcomes to your organization, funders and other stakeholders.

When tracking data, you must establish protocols for data collection to ensure that all members of the staff are using the same terminology to describe the same things. Such uniformity is achieved through "drop-down lists" that are unique to columns of information. By standardizing the categories of assistance and the types of data collected, you can easily create graphic representations of the data for reporting purposes.

SPECIALIZED OUTCOMES-TRACKING SOFTWARE

Enterprise Community Partners, Inc. and NeighborWorks America worked with the Pangea Foundation beginning in 2006 to design new software for resident services coordinators and managers to track services and outcomes for families living in affordable housing. The new software is adapted from software already available for seniors through <http://www.familymetrics.org>. FamilyMetrics is Web based, so multiple staff can enter or review data at the same time, efficiently and effectively. It manages data for tracking and reporting outcomes. For more information about how this software works and to purchase FamilyMetrics, go to <http://www.familymetrics.org> or <http://www.pangeafoundation.org>.

Another software program that has been available for several years is the Web-based software called Efforts-to-Outcomes, created by Social Solutions. More information about this software is available at <http://www.socialsolutions.com>. Like FamilyMetrics, it can also be used to track group program participation as well as demographics and resident employment and education status.

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BUDGETING, STAFFING AND OTHER BENCHMARKS FROM SEVEN ORGANIZATIONS OFFERING RESIDENT SERVICES

To provide guidance for resident services program planning, Enterprise supported research on the costs of operating a resident services program. The research included a review of the operations and budgets of seven nonprofit housing organizations with resident services programs. These organizations were affiliated with Enterprise, through its Resident Services Initiative, or with NeighborWorks America, through its Learning Center Consortium, and had proven themselves capable of delivering effective resident services. There are several challenges to this research and the compilation of learning from the research. First, multiple variables affect the operations and costs of any one resident services program. Second, few programs have similar cost profiles, even though their program content might be similar. Finally, the fact that organizations aggregate financial data differently impedes the development of cost ratios among programs.

Nonetheless, through the existing programs researched for this report, there are considerable lessons to be learned that can help the field plan the design and prepare for the cost of future programs.

Because the service focus of the seven programs varied substantially, macro-level data do not provide much useful program business-planning information, except to establish size parameters in an order of magnitude. This is a summary of macro-level data for the entire resident services programs, including one-on-one personal services, adult and youth education programs, special event programs and allocations of overhead where available.

COSTS

Per-unit costs

“Per unit” costs refer to the total annual cost of the program divided by the total number of residential units for which services are provided. The per-unit costs for an entire resident services program ranged from \$327 to \$719; however, the two extremes represented special exceptions. The lowest cost was for a scattered-site owner with a single, centralized community center and no youth programs. The highest cost was for the owner of a small number of units, whose aggressive resident services program resulted in substantially higher per-unit costs at this stage of the organization’s development. Although the average of the seven organizations was approximately \$575 per unit, four of the larger organizations with the multifaceted service programs were tightly bundled between \$600 and \$650 per unit.

Per-unit, on-site cost of programs with a coordinator or community room

Two organizations offered data on specific sites without central office or overhead allocations. Their per-unit costs were \$426 and \$340 (or an average of

\$383). Subtracting this from the total program costs for those organizations resulted in an average central office and overhead allocation of approximately \$192 per unit for organizations with on-site coordinators.

Total on-site costs

The total cost of providing a full-service program at a single housing facility depends on a wide range of factors, including the number of units, level of service, etc. However, for the organizations where individual sites had a full-time resident services coordinator, the total costs for the sites (without any allocation of central office costs or overhead) ranged from \$49,000 to \$63,000 per facility. Per-unit, on-site costs ranged from \$350 to \$650. The facilities with more units of housing have the lower per-unit costs.

Cost per individual participant

Five organizations reported total participant data. The average cost per participant, not including multiple contacts for the same participant, was \$350 per participant for the year. Only two organizations reported the total number of individual residents, including adults, children and others in their facilities, and the average cost for those was \$140 per resident. This number is possibly a bit low, since it represents an average occupancy of four residents per apartment. One organization was able to report the total incidences of participant services provided in a year, including multiple service events to the same resident. The cost of service was \$77 for each incidence.

Cost breakdown by expense type

As might be expected, resident services programs have a large allocation of costs to personnel services. Contractors providing professional services, such as teachers or training professionals, were included in the operating expense category.

	Average	Range
Salaries and Wages	73.7%	60.7% - 88.2%
Operating Expenses, including contractors	26.3%	11.8% - 39.3%
Contracted Services (incl. in operating expenses above)	8.8%	3.4% - 13.8%

The organizations with the largest operating expenses tended to be those that contracted with outside expertise for instructional services for adult and youth programs. The actual cost for typical operating expenses, such as telephone, travel, mileage, supplies and related expenses, was quite small. In many cases, direct expenses for refreshments, instructional supplies, party favors, prizes, etc. were donated.

SPACE ALLOCATION

All of the organizations had community facility space available in nearly all of the residential facilities in which they provided resident services. However, in many of the older facilities, space was a serious issue. Most of the community facilities had a minimum of approximately 1,000 square feet dedicated to com-

munity space, which managers thought was a good minimum for meeting space and could easily accommodate programs for 30-40 residents at a time. Managers also reported that a resident coordinator program needed at least one private office for the coordinator to meet with tenants and that the community space should have a separate computer room if feasible. Many facilities operated with a computer area located in a corner of the community room, but this led to conflicts. The resident services directors reported that their organizations were designing new facilities to contain at least one private office, larger community rooms and a separate computer room for the resident services program. They also reported that they were frequently able to squeeze out a little more space in older facilities including, in a couple of cases, converting former residential space into community space or offices.

YOUTH PROGRAMS

After-school programs

Although four organizations operated some sort of after-school program, they were all so different it was not feasible to find common operating data for bench marking. Several programs operated with partners or volunteers that resulted in very low-cost programs. The two programs that provided sufficient data to calculate a per-unit cost varied from \$190 to \$719, probably representing the two extremes. The first was a very large organization with six after-school sites serving very large facilities. The higher-cost program served only a very small number of units and used a sizeable number of contract teachers.

The cost-per-eligible-youth varied from \$414 to \$761, but these numbers apply to the total number of eligible youth living in the residences and not the number of participants. Cost-per-participant data can only be extrapolated from the one program reporting per-site costs, and that cost was \$750-\$850 per participant slot for the school year. Based on the one multi-site program with site-specific data, the cost of operating each site was approximately \$25,000 per school year. Two programs operated with contract teachers rather than resident services staff or volunteers, and their cost for those teachers ranged from \$12,000-\$15,000 for the school year. Most programs operated for three hours per day, and the teachers were provided one planning hour per day for a 20-hour work week.

Teen tutoring

Regular after-school programs are oriented toward youth up through the eighth grade or sometimes a year or two older. For high-school age residents, programs tend to focus more on tutoring programs that provide one-on-one assistance with homework or meeting special program content tutoring needs. Tutoring programs operate principally with volunteers from the community, but a few organizations also developed special education programs for teens, such as financial education, career planning or building higher aspirations for education. Several programs operated one evening per week for approximately two hours. One organization developed a special eight-week program to teach "life skills," which proved highly popular with both youth and parents. For the

one organization with detailed cost data for its teen tutoring program, the cost per residential unit was \$131, and the cost per teen participant over the course of a year was \$791.

Summer camp

Five of the seven organizations provide some form of summer youth program, but two of them provide camp through partners at no cost to the affordable housing sponsor. One of those provides free space to the partner at each of its 11 facilities, and the partner handles all other aspects of the program. The other organization formerly ran its own summer program but found that there were plenty of slots available in well-developed programs run by others in the community. So it now helps place individuals in those programs instead.

One program serves approximately 120 youths at five sites covering six properties for a total cost of \$146 per youth for a seven-week program. This cost does not include a small amount of central office overhead and direct supplies. Each site operates 35 hours per week and serves approximately 24 youths. The cost for each counselor, usually college students studying youth education, is \$3,500 for the summer or approximately \$12.50 hour.

Pre-school

None of the organizations analyzed operated their own pre-school program, but five of them sponsored pre-school programs through one or more partner organizations. Two of the organizations donated space to the pre-school partner. All of the organizations were satisfied with the partnering arrangement, and most of the day care slots were made available to residents at low or no cost.

ADULT PROGRAMS

Although all of the organizations either sponsored or supported programs in English as a Second Language (ESL), General Education Development (GED) and employment readiness, such programs were either totally or partially developed and provided through partners. A few of the affordable housing organizations provided space for these programs and provided limited counseling to residents in support of these programs.

Four organizations had adult education data. Their average cost was \$157 per housing unit, and the range was from \$83 to \$234 per unit. Based on numbers from three programs with student-specific data, the average cost was \$351 per participant, but the costs ranged greatly—from \$161 to \$563 per participant. The midpoint figure of \$329 was based on a program with very detailed cost and participation data and based on enrollments of 15-25 students for classes of 8-10 sessions. It is likely, therefore, that a cost of \$300 to \$350 per student is a reasonable assumption for programs of a similar size.

Most of the homebuyer programs were taught by staff, but with several adjunct teachers from the business community to handle special sessions. The latter

were usually volunteers, such as appraisers, mortgage brokers, bankers, home inspectors and other real estate professionals. The cost per residential unit was \$133, and the cost per adult participant over the course of a year was \$469.

STAFFING RATIOS

The ratio of resident services staff to the number of housing units varied from 1:55 to 1:165, but the lower ratio represented a growing organization with so small a number of units currently under management that it should be considered an anomaly. Among the balance of the organizations, there were two clusters of staffing ratios. One cluster averaged a ratio of about 1:85 and the other cluster averaged about 1:160. Not surprisingly, the cluster at 1:85 represented the organizations that relied more heavily on staff to deliver core programs, whereas the organizations with the lower ratio of 1:160 relied more on partners and volunteers. Despite this clustering, it is not feasible to develop benchmark staffing ratios because of the diversity of programs and operating methodologies. The only staffing ratio that appeared to be somewhat consistent was the teacher-to-student ratio in both the adult and youth education programs. The ratios varied from 15 to 35 students per teacher with a concentration around 25.

PARTNERS AND VOLUNTEERS

Nearly all of the organizations relied on partners to provide one or more of the traditional resident services tasks and nearly every major program under the resident services umbrella was being provided in at least one organization by one or more partners. Anecdotal evidence indicates that the availability of partners is somewhat opportunistic and likely varies among the states depending on the availability of funding. The types of partners varied considerably, but there was a lot of partnering with well-known organizations like Boy Scouts, Girl Scouts, Junior Achievement, Big Brothers and Sisters and similar organizations. Overall, it appeared that there are many opportunities for affordable housing organizations to find a no-cost or low-cost partner to provide many of the resident services.

One of the organizations new to providing resident services was somewhat instructive regarding the opportunities for outsourcing to partners. Due to the inability to marshal a lot of funding quickly for an internally directed program, the resident services director made an intensive effort to identify and develop formal relationships with 42 different service providers to provide the direct service component of a number of programs. In this case, the coordinators are able to focus more on direct individual services to residents despite higher unit ratios. More study would be required to understand the dynamics of that region to determine the degree that this is replicable. In essence, the resident services director in that situation concluded that if the organization could deliver the clientele, space and logistical support, there were several potential partner organizations that had the program delivery capacity and the need for productivity such that it was a win-win for both organizations.

Certain program areas were riper for partnering than others. Nearly all of the organizations reported having partners deliver pre-school day care services. Generally, there was a trade of space for a program, although a couple of organizations charged the partners a small amount of rent. Summer youth programs were widely provided by partners, again with the occasional provision of free space. Most programs also relied on partners to provide traditional educational services such as ESL and GED and also employment assistance. In many cases the latter providers were local or state government agencies or contractors. In a few cases, the affordable housing organization augmented some of these services and in particular the employment services.

Most of the resident services programs are highly amenable to the use of volunteers to deliver direct services. A large part of the job of many resident services coordinators is organizing and supervising the delivery of services by volunteers. Although volunteers occasionally serve as trainers for financial fitness and computer programs, volunteers are most commonly used in youth programs where they serve as homework club mentors, teen tutors and event chaperones. Nonetheless, volunteers in some markets are relied on for tax return assistance, personal financial management assistance, computer training and other tasks. In the latter case the volunteers are usually professionals from within the community such as bankers, computer technicians or bookkeepers. It appears that a good volunteer program with clearly defined tasks can generate considerable cost savings to the organization.

REVENUES

Many programs charge a nominal fee, frequently \$5 or so, for an entire series of seminars. This is designed more to provide residents with a sense of value to the training rather than to raise funds because the nominal fees are a very minor amount of the actual cost. Most larger programs had a dozen or more sources of funding and generally relied on any one source for no more than 10 to 15 percent of the total resident services budget with the exception of property-related revenues, which in a few cases provided as much as 50 percent of the total funding of the resident services program. In many cases, the sources of revenue changed over time and as a result of changes in service priorities. Homebuyer and financial fitness programs appeared to generate considerable interest for grants and related support from the business community.

MANAGEMENT STRUCTURE

The seven programs were structured organizationally much the same with the resident services program being managed by a director of resident services who reported directly to the CEO. In one instance, the director of resident services was the organization's assistant executive director, whose primary focus was on resident services. In another instance, there were two major resident services programs, each with a separate director; however, one of the programs was more focused on non-resident participants.

For organizations with larger programs and a large number of facilities, the next layer of management consisted of either one or more program managers of specific programs such as financial fitness program manager, computer center manager or youth program manager. Residential services coordinators were responsible for one or more residential complexes. The residential services coordinator and program managers all reported to the director of resident services. For smaller organizations, there was no program manager level and the director and coordinators shared all of the program management functions.

In the larger organizations with specific program managers responsible for developing and delivering program content, the resident services coordinators tended to be more involved in intake and referral and crisis management services. They provided principally logistical support, such as marketing and event management services, for programs delivered at the community center. In organizations without content program managers, the coordinators relied on a combination of internal and volunteer or partner resources for program delivery. In some organizations, however, the organizational structure was driven more by the mission with those focusing on moving their residents to privately owned housing tending to rely less on residential services coordinators and more on content-oriented program managers to deliver programs at the facility.

The presence of a resident services coordinator with specific office hours at each facility on at least a part-time basis seems to be a prerequisite for a successful program. The resident services delivery professionals have learned that it is first necessary to generate the trust of the residents and the best way to understand their needs and earn trust is to be available to listen. That allows the organization to deliver interesting and valuable program content that addresses the needs of residents. Fixed hours of operations are helpful by generating predictability. It is more important for the resident services coordinators to be available for a few hours on a fixed schedule than for more hours on an unreliable schedule.

GOALS ASSESSMENT AND EVALUATION

All of the organizations have mechanisms in place to perform goals assessments of its residents and formal performance evaluations of its programs. Most of the organizations do both in house. A few have begun contracting for program evaluation services, and others reported plans to contract more for evaluation services in the future. Those that are planning to contract with an independent third party for evaluation services are looking to work with local universities. Those that currently contract for evaluation work have very modest budgets of \$5,000 or so.

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INTRODUCTION TO MICROSOFT® EXCEL-BASED TOOL FOR BUDGETING RESIDENT SERVICES PROGRAMS

Creating budgets for resident services programs can be difficult, especially for new programs. Despite the difficulties involved, budgets are essential, particularly for small, single-site programs where minor changes in funding or costs can cause major disruptions throughout the other service areas.

While established programs can use past budgets to determine proper program allocations for a new year, newer programs do not have such luxuries. Moreover, established programs benefit from having budgetary systems in place that have likely undergone revisions and iterations depending on the performance of these systems in the past. Many new programs, meanwhile, will likely take a trial-and-error approach to budgeting and budgetary systems, at least for their first few budget cycles.

To assist resident services coordinators and other program staff to develop budgets, Enterprise has created a tool using Microsoft Excel that is easy to use and easy to customize to fit particular attributes of any program. Based on budgeting and staffing benchmarks for resident services from the research funded by Enterprise (which is described earlier in this section), the budget tool presents a representational service program that divides the total budget among a range of different on-site service and referral programs. The list of services in the tool is certainly not exhaustive, but the format for each service area's budget can be used regardless of what type of service is actually provided; that is, users can replace any numbers or assumptions about programs to tailor the tool to their specific organization. The list of services described in the tool includes:

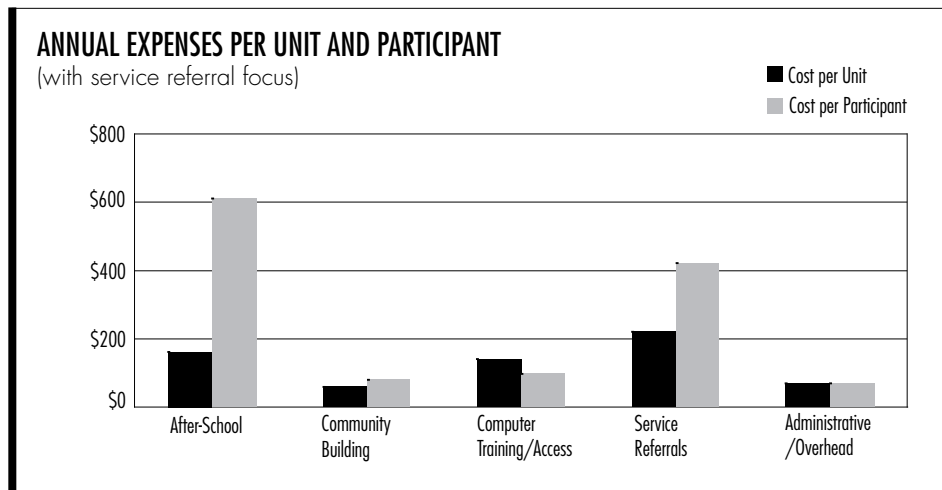
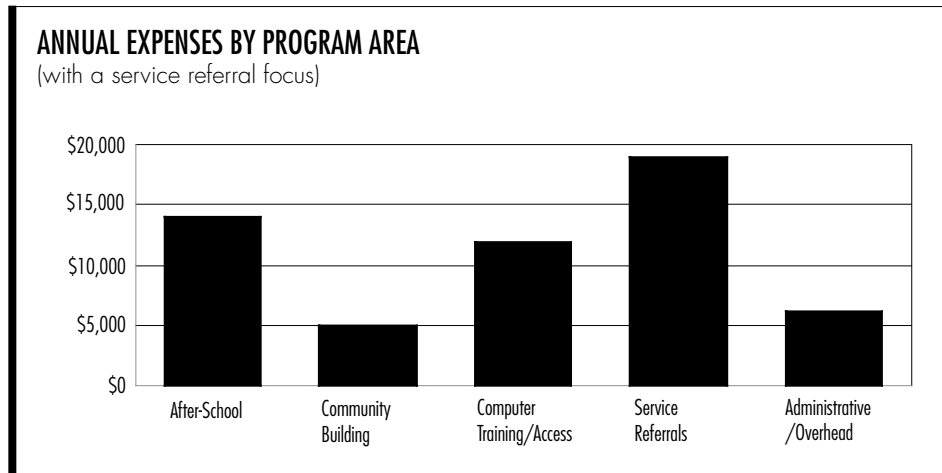
- After-school program
- Teen tutoring
- Computer access and training
- Community building
- Financial literacy
- Service referrals
- Administrative
- Staff (which includes cost information for taxes and benefits)

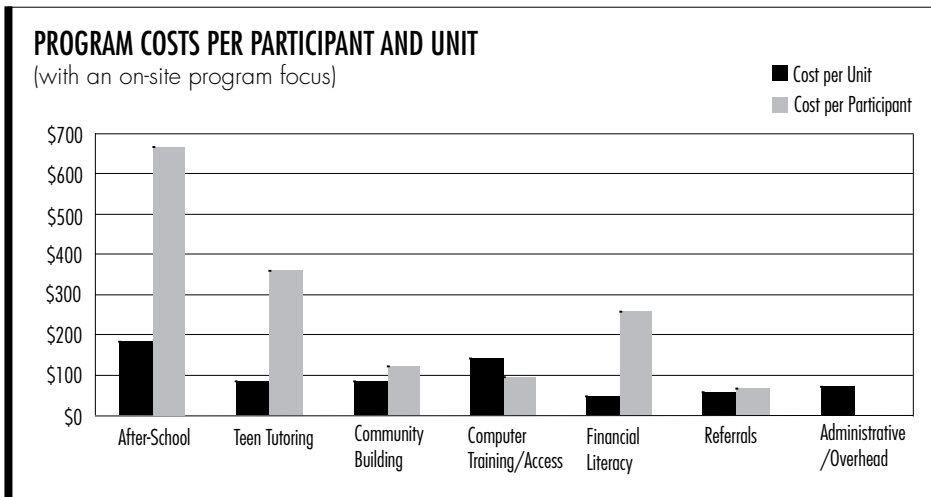
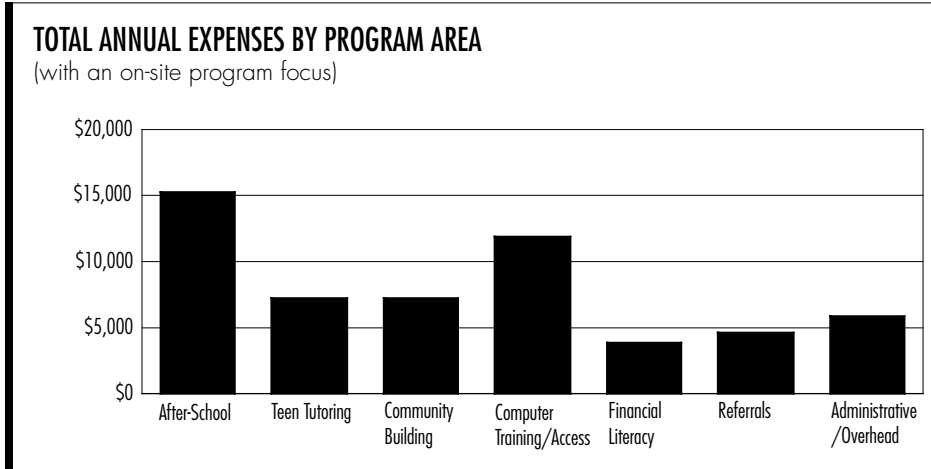
Worksheets for a budget “roll-up” page and a page detailing cost and other assumptions are also included.

Each program area has a list of expenses that was generated, as previously mentioned, using assumptions and cost research that studied service programs of a wide range of sizes. Within each program, there are assumptions about how the program is structured (e.g., number of participants, number of days it is offered, percentage of coordinator's total time spent on program) that can be changed according to unique organizational circumstances. Changing any of the as-

sumptions will result in a corresponding change in the program’s expenses, which will then change the numbers, charts and tables on the roll-up page as well.

The roll-up worksheet serves as the master budget. All of the program expenses are combined and compared to revenue, which in the case of this tool was designed to match total expenses and was divided by sources based on Enterprise’s research. The roll-up page allows users to analyze budgets and can help determine how to best allocate funding and resources for programs. The roll-up page is also useful for reporting to funders and any other organizations that oversee a program. Finally, the roll-up page includes tables that can be converted into easy-to-read charts, such as those below. (Note: the first two charts represent a resident services program with a service referral focus, and the next two charts represent a program with an emphasis on providing on-site services).





This Excel-based tool is available for downloading and customizing through the online version of this manual, which can be found at <http://www.enterprisecommunity.org/resources>.

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COMPONENTS OF THE JOB AND ATTRIBUTES FOR SUCCESS AS A RESIDENT SERVICES COORDINATOR OR PROGRAM MANAGER

At the core of every resident services program is the resident services coordinator (RSC). It is the RSC who formulates supportive professional relationships with the property's residents and in the process of doing so develops an in-depth understanding of the residents' daily lives and their individual hopes and goals. The RSC also identifies, assesses, selects, develops and maintains referral partnership relationships with community services resources. This enables the RSC to effectively coordinate service resources that match the residents' goals, such as adult education, workforce development, financial literacy, child care and after-school programming. Typical service resource referral partners include:

- Workforce development agencies
- Physical and mental health services
- After-school programs
- Child care or early childhood development services
- GED, ESL, and other adult education opportunities
- Emergency needs for residents in crisis (rent, utility, etc. assistance)
- Financial literacy and homeownership courses
- Intensive case management in specific situations such as domestic violence, child abuse, substance abuse, etc.

In some instances, an RSC develops and implements programming directly, as the appropriate resource is not available in the locality. Typical on-site resident services include:

- After-school care for improving educational performance or for safe havens for children
- Computer learning centers
- Financial literacy and homeownership preparation
- Organizing residents to improve community safety
- Resident social events and community-organizing events

An RSC also works closely with property management in situations in which a tenant's ability to maintain residency is in jeopardy, and provides support to assist the resident to successfully rectify the situation both on a short-term and long-term basis. Finally, after performing all of these activities, the RSC is required to develop program targets, track and measure the progress of these targets and then report on a regular basis to the resident services program's stakeholders.

With such a demanding array of job responsibilities, it is clearly imperative for housing management to dedicate significant time and energy in recruiting, hiring and supervising RSCs. The following text provides an overview of the typical work components of the RSC position, a sample job description and

pertinent attributes that management can look for from applicants when hiring for their RSC program.

Typical Components of a Resident Services Coordinator Job

- Developing positive, professional, working relationships with the property's residents and the property management staff
- Helping residents facilitate social activities and community-organizing activities
- Disseminating information about the resident services program to residents
- Assisting residents to identify life-opportunities goals
- Identifying and evaluating the quality and scope of service resources in the community
- Selecting, developing and maintaining referral partnerships with local service resource organizations
- Referring residents to appropriate services
- Raising funds to deliver on-site services when such services are needed
- Setting program target outcomes, following up and tracking referral outcomes to ensure that residents have achieved a successful outcome from the resource service
- Measuring referral outcomes and documenting the results to program stakeholders
- Utilizing outcomes data to improve program performance
- Coordinating with property management to ensure that families are successful tenants

Common Attributes of a Successful Resident Services Coordinator

- Self motivating
- Can work with diverse groups and individuals
- Ability to multi-task
- Ability to perform in stressful situations
- Ability to communicate with many different people, including children, parents, school teachers, funders, partners, senior management, volunteers
- A team player
- Ability to deliver requirements on time
- Ability to follow established protocols

Typical Components of a Resident Services Program Manager Position

A resident services program manager might be someone who started as a resident services coordinator or could have other housing development or management background. The typical job components would be:

- Program policy development
- Resource development planning and implementation
- Establishing and maintaining external relationships
- Managing key strategic or technical consultants
- Program budget oversight

- Analyze program outcomes data, develop board and funder reports and use data to inform strategic decisions about program selection and design
- Negotiation and problem resolution
- Staff supervision and support

Common Attributes of a Successful Resident Services Program Manager

- Competence in staff recruitment and retention strategies
- Can provide staff training, orientation, scheduling
- Possesses strong prioritization skills
- Gives clear directions
- Ability to evaluate data reports and use data to make informed program decisions
- Ability to work and communicate with a diverse staff and resident populations
- Ability to coordinate volunteer recruitment, training, management and retention
- Ability to organize systems development and program implementation
- Ability to develop and implement specific program procedures and protocols
- A decision maker
- Perceptive – can align partners with the strategic plan
- A relationship builder: with residents, property management, partners, funders, senior management, governmental agencies
- Resourceful

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SAMPLE JOB DESCRIPTION FOR A RESIDENT SERVICES COORDINATOR

The primary function of the resident services coordinator (RSC) is to effectively assist resident family members that have requested support in enhancing the quality of their daily lives and in more fully and successfully participating in the educational and economic mainstream. The position provides tenants with information about and supportive access to local services and resources that can assist the residents to achieve their life opportunities objectives. The resident services coordinator is an integral part of the housing and property team and plays a critical role in the overall positive maintenance of the property for the enjoyment of its residents and the respect of its neighbors.

RESPONSIBILITIES

1. Welcome new residents (and establish contact with existing residents) and explain to them the resident services program, its offerings, and the RSC role in providing information and support in assisting residents interested in accessing local service resources.
2. Identify, assess, select, develop and maintain referral partnership relationships with local service resource agencies that effectively assist residents to achieve their life opportunities objectives.
3. Provide supportive linkages between residents and referral agency staff when residents or agencies request assistance.
4. Work with the property management team when a resident is identified as being in jeopardy of eviction and offer linkages and referral support to the resident to positively and quickly rectify the situation.
5. Establish resident services program targets. Consistently track and measure program target progress. Regularly report program outcomes to both internal and external stakeholders. Analyze and utilize outcomes data as the basis for continuous program improvement.
6. Identify and assess individual and family needs when appropriate; inform the resident of available resources and provide support in accessing services successfully.
7. Help to facilitate tenant meetings and community-organizing and social activities if desired by residents.
8. Develop supportive professional relationships with residents that help them enhance the quality of their lives, empower them and encourage them in taking the steps to achieve self-sufficiency.
9. When requested, work with property management in mediating conflicts between tenants.
10. Complete other housing and resident related assignments as directed by the supervisor.

SUGGESTED SKILLS/BACKGROUND NEEDED

1. Enthusiasm in working with people
2. Experience with community organizing and the social service system
3. Knowledgeable about the daily realities facing low-income families
4. Some background and experience in affordable housing programs
5. Ability to multi-task and complete assignments that sometimes occur in a stressful environment
6. Strong verbal, written and interpersonal communication skills
7. Computer and technology proficient
8. Program evaluation experience helpful

MINIMUM REQUIREMENTS

The successful candidate for the RSC position will possess:

1. A bachelor's degree in the field of human services, plus a minimum of one year of experience working with people of low income; or a minimum of three years of documented, successful experience in community development or community-organizing activities.
2. A working knowledge of the local social service system or the proven ability to quickly develop such knowledge.
3. The ability to identify, assess, select, develop and maintain community service referral partnerships that assist residents in achieving their life opportunities objectives.
4. Excellent interpersonal, verbal, and written communication skills.
5. Demonstrated experience in successfully working with diverse populations.
6. Competent computer and technology skills.
7. The ability to establish, maintain, track, measure and report to stakeholders the program's objectives and their efficacy in assisting residents to achieve their life opportunities objectives.

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USING AMERICORPS TO HELP YOUR RESIDENT SERVICES TEAM

Affordable housing owners trying to build their resident services programs often have difficulty with staffing—specifically finding ways to fund it. Even, with a full-time service coordinator on staff, it is nearly impossible for one or even three or four people to provide the depth of services and offer the resources that owners want to for all of their residents.

AmeriCorps and AmeriCorps VISTA may offer an answer to staffing needs. Both programs are designed to provide services locally and nationally and to fight poverty. While AmeriCorps and AmeriCorps VISTA share the same parent organization, there are some differences between the two programs. These differences affect how the volunteers can be utilized in resident services.

UNDERSTANDING BOTH PROGRAMS

AmeriCorps provides funds to local and national organizations and agencies committed to using volunteers to address community needs in education, safety, health and environment. These agencies, in turn, use their AmeriCorps funding to recruit, place and supervise AmeriCorps members.

AmeriCorps VISTA is a national service program designed to fight poverty. Founded as Volunteers in Service to America in 1965, it was incorporated into the AmeriCorps programs in 1993. VISTA members commit to serving one year. However, their service is confined to more administrative tasks such as planning, budgeting and recruiting. They are not able to offer direct service.

AmeriCorps	AmeriCorps VISTA
Obtain volunteers through grant from a state commission	Obtain volunteers through a grant from national Corporation for National and Community Service
Members serve 1,700 (full-time) or 900 (part-time) hours over a year	Members serve 365 days
Members do direct service	Members work on capacity building in impoverished areas – not direct service
Members receive an allowance (approx. 800/month) which can vary by location	Members receive an allowance (approx. \$800/month) which can vary by location
Members may attend school or work at another job while in service	Not permitted to work/attend school
Receive educational award after completion of service \$4,725 (FT), \$2,362 (PT)	Can choose to receive educational award of \$4,725 or get cash stipend upon completion of service

PROFILE: COLUMBUS HOUSING PARTNERSHIP

CHP has used AmeriCorps volunteers from both AmeriCorps and AmeriCorps VISTA for over 10 years. CHP's resident service staff includes a program manager, an administrative assistant, a full-time service coordinator and one part-time coordinator. CHP uses its volunteers to assist this core staff.

CHP uses a combination of AmeriCorps and AmeriCorps VISTA volunteers to best utilize their skills and resources. Currently, they have 12 full-time AmeriCorps volunteers and nine full-time VISTA volunteers.

CHP works to give an identity to their volunteers. The organization invests a great deal of time in planning programs and carefully designing the roles the volunteers will play within those programs prior to the volunteers' arrival.

AmeriCorps VISTA volunteers are not permitted to do direct service. CHP uses them to work on the planning and administrative components of its programs. VISTA volunteers plan programs such as tutoring, ESL, health and safety events. AmeriCorps volunteers do direct service, running programs, helping service coordinators in direct service and assisting in running the resident council.

APPLICATION PROCESS

Information for both programs is available at <http://www.americorps.org/>. The application processes for AmeriCorps and AmeriCorps VISTA are different and separate.

AmeriCorps

- AmeriCorps has a lengthy application process. It takes about six months to a year to plan, apply for and complete the grant process.
- AmeriCorps holds state information sessions that allow potential applicants to learn more about the process, ask questions and better understand the program.
- In order to obtain funds for AmeriCorps volunteers, organizations must be willing to use a minimum of eight volunteers.
- Funds may be used to cover the planning process and recruitment process in addition to the period when volunteers are with the organization.
- AmeriCorps commits funds to cover three years of volunteers for organizations, but each year brief applications must be submitted and approved before receiving funding for the second and third years.

AmeriCorps VISTA

- Application for the VISTA program is made to the federal government.
- The application process takes about six months. AmeriCorps' website offers links to instructions for potential applicants or VISTA "project sponsors."
- Project sponsors are not required to provide a financial match but must be able to direct the project, supervise the members and provide necessary administrative support to complete the goals and objectives of the project.

MAKING THE MOST OF AMERICORPS: ADVICE FROM CHP PRACTITIONERS

- Invest time in recruiting your volunteers to ensure a good fit between the organization and the volunteers.
- Provide adequate financial resources to train them (CHP, the organization profiled in this document) includes about \$5,000 in their annual budget to cover all the training associated with the AmeriCorps volunteers.
- Consider partnering with other nonprofit organizations using AmeriCorps volunteers to reduce training costs.
- Make sure the training is thorough and offers background into the organization and the issues it is working on (such as affordable housing, community building and poverty).
- Offer personal development trainings for the AmeriCorps volunteers. This helps volunteers in two ways. First, they are better able to help teens in their resident communities with job searches. Second, the volunteers themselves are often thinking about their next move upon completing their service. This training may guide them towards joining the world of affordable housing and services.
- Provide resources in your organization and in the community that will help the volunteers do their jobs. (CHP runs tours both within the organization and in the surrounding community.)
- Visit AmeriCorps' website to figure out ways to use this program to strengthen the quality and breadth of services you are able to offer.

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