

# CORES Certification

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April 19, 2022

# Structure for Today



- Overview of CORES Certification Program (25-30 min)
  - Eligibility & Requirements, Application Process
- TA Workshopping Session
  - Resident Services Models – Where Does My Organization Fit?
  - Eligibility & Threshold Requirements (including the 4 key documents)
  - Application Process
  - Other Questions/Topics?

# Housing as a Platform for Success





## **Certified Organization for Resident Engagement & Services**

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



- Start to establish guidelines, common language and standards for resident services
- Continued culture and systems change at the practitioner, policy maker, and investor level
- Stable funding for resident service coordination and implementation
- Demonstrated the impact of stable affordable housing enriched with services



# Resident Services Coordination



A **System of Resident Services Coordination** includes all the functions tied to the coordinated mission to implement resident services in affordable housing rental properties, including:

- Corporate and Site-based Staff
- Training and Capacity Building
- Programs and Services
- Partnerships and Relationship Building
- Use of Data, Research, and Evaluation
- Technology Systems
- Sustainable Funding
- Other Organizational Knowledge & Tools

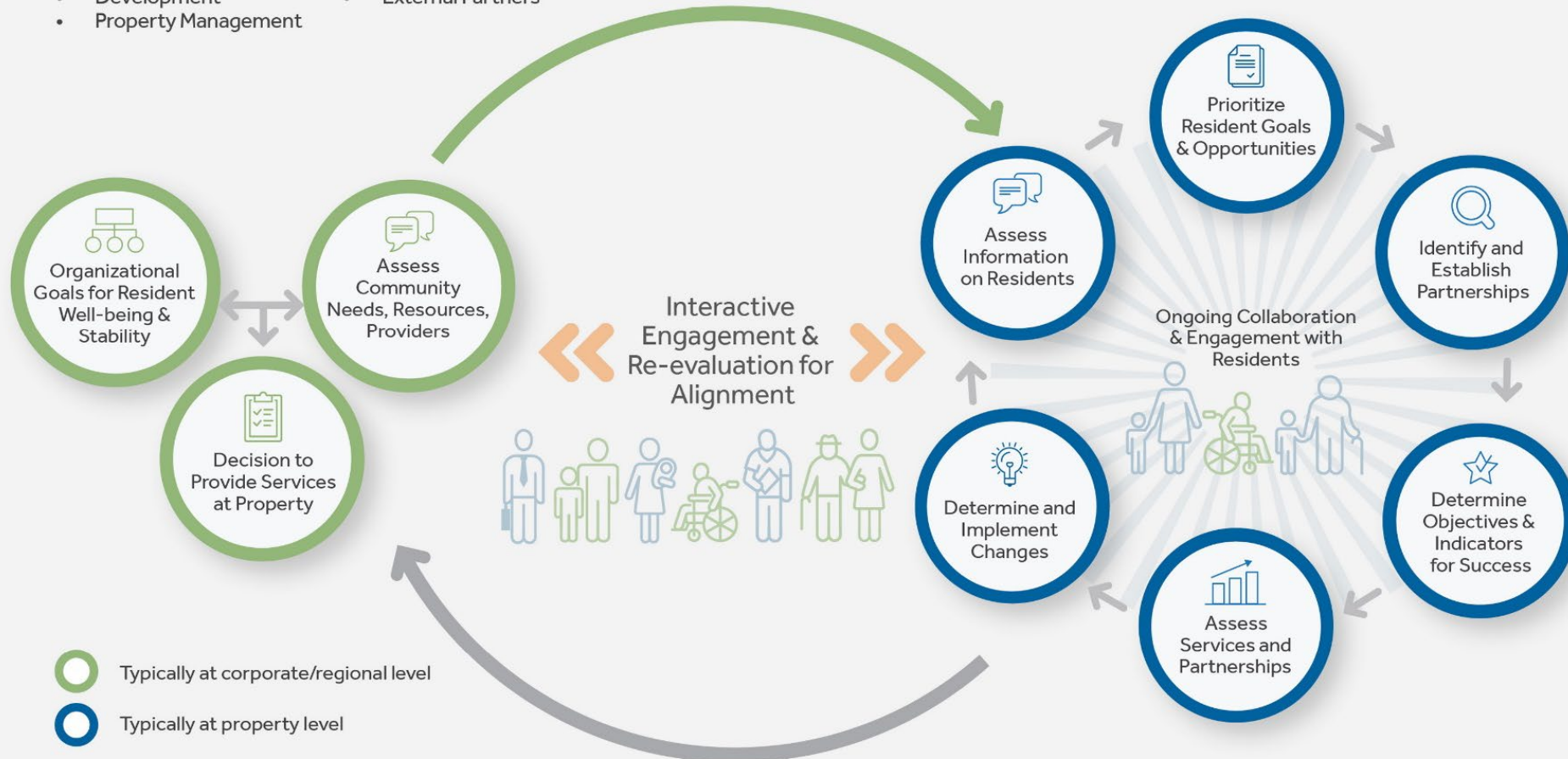


# Framework for a System of Resident Services Coordination

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

## STAKEHOLDERS ENGAGED

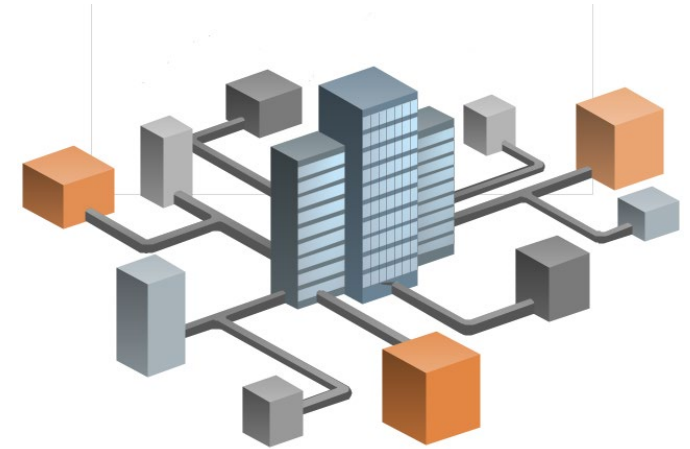
- Residents/Community
- Resident Services
- Executive Suite
- Development
- Property Management
- Information Technology
- Asset Management
- Fundraising
- External Partners



2021 Update



- **CORES Certification** applies to the **organization**, covering the entire portfolio, for **five years**.
- CORES certification is one requirement for eligibility for Fannie Mae's Healthy Housing Rewards - ERS financing.
- CORES is being included in state LIHTC QAP applications



- CORES has also developed a property-level certification (an **ERS Property Certification**) for organizations seeking financing with Fannie Mae.
- Organizations would first get CORES certified and then could apply for an ERS Certification for a specific property where they are seeking ERS financing from Fannie Mae.



# Three Application Models



## Direct Model

- Affordable housing owner-operators retain **direct responsibility** for the development, management, delivery, and implementation of RS Coordination infrastructure and staffing.

## Hybrid Model

- Affordable housing owners contract with an unrelated third-party entity (property management company/other services organization) to hire on-site RSCs/staff
- However, the owner/operator has developed and manages the resident services infrastructure - retaining leadership, management, standards, and support capacity for RSC at their properties

## Third Party Model

- An owner may contract with an external (third party) organization to provide all aspects of RSC (management, delivery, implementation of RSC) at property/ corporate/ regional levels.
- Third party services may be provided for one owner or for multiple
- Third party organization would gain certification (not the owner)

**\*\* THERE IS ALSO A STREAMLINED THIRD PARTY OPTION \*\***



- Approximately 50 questions in the application (regardless of the RS Model). These can be found on the CORES website along with our scoring rubric.
- Variety of formats: Text Boxes, Drop Down, Select All, Requested Documents, Required Documents
- Most questions deal with an organization's demonstrated process and approach to RS Coordination
- There are **9 threshold/minimum requirements** that come from the Framework for a System of Resident Services Coordination
- The cost for the five year Certification is \$5,500

# 9 CORES Threshold Requirements



- 3+ Years of Experience as a Multifamily Housing Provider (Direct or Hybrid)
  - For Third Party Model, must have 3 years experience as third-party provider
- Must fit one of the models: Direct or Hybrid or Third Party
- 3+ of Experience with Resident Services Coordination
- Corporate level support for resident services functions & RS Coordinator Staff & Coordination at more than one property
- Strategies for addressing low participation rate of residents
- Use 4 Key Property-Level Documents/Tools: (1) Community Scan, (2) Resident Opportunities & Priorities Assessment, (3) Property Services Plan, and (4) Resident Indicators & Analysis Report



# 4 Key Documents/Tools Required for CORES



COMMUNITY SCAN

Update every 6 yrs



RESIDENT  
OPPORTUNITIES &  
PRIORITIES ASSESSMENT

Update every 3 yrs



PROPERTY SERVICES  
PLAN

Update every 3 yrs



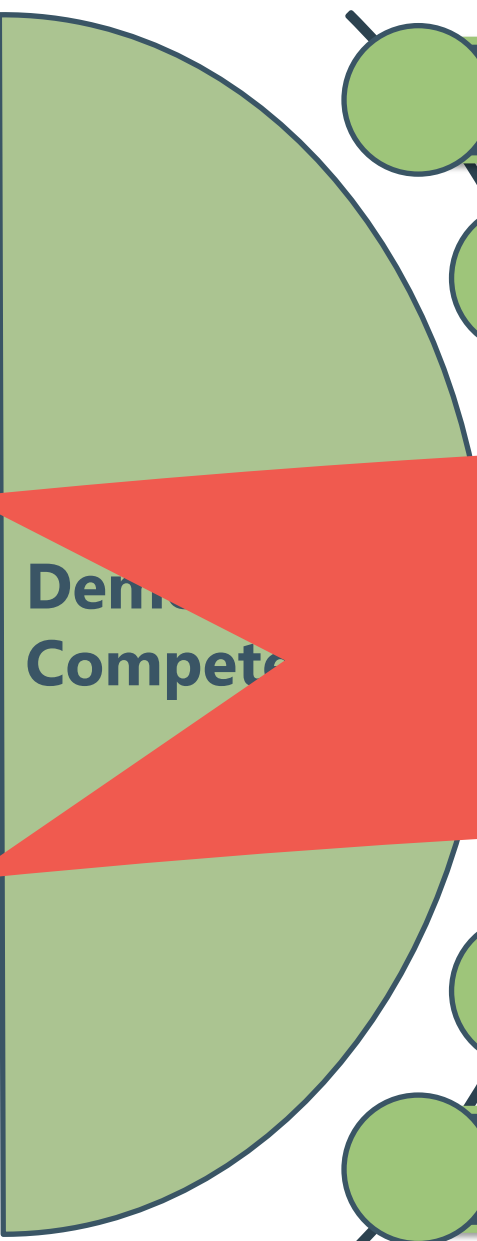
RESIDENT INDICATORS &  
ANALYSIS REPORT

Update annually

All four documents should be from the same **one** selected property

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Demand  
Compete



Organizational Structure - Resident Services as a Part of Business Model & Mission

Staffing Infrastructure, Capacity, Training, Support, and Accountability

# Resident-Centered Engagement and Programming

able Properties

Shape

Development and Management of Partnerships

Use of Data to Track and Understand Impact of Programming

Approaches to Sustainably Funding Resident Services

# The Value of CORES Certification



**CORES**

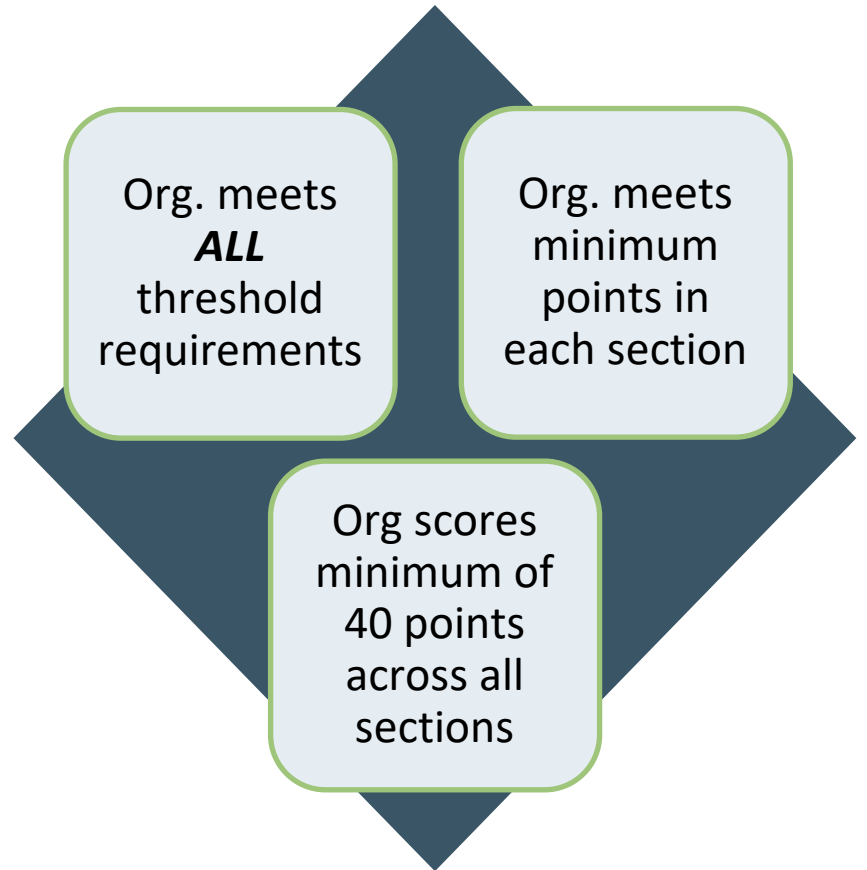
Certified Organization for Resident  
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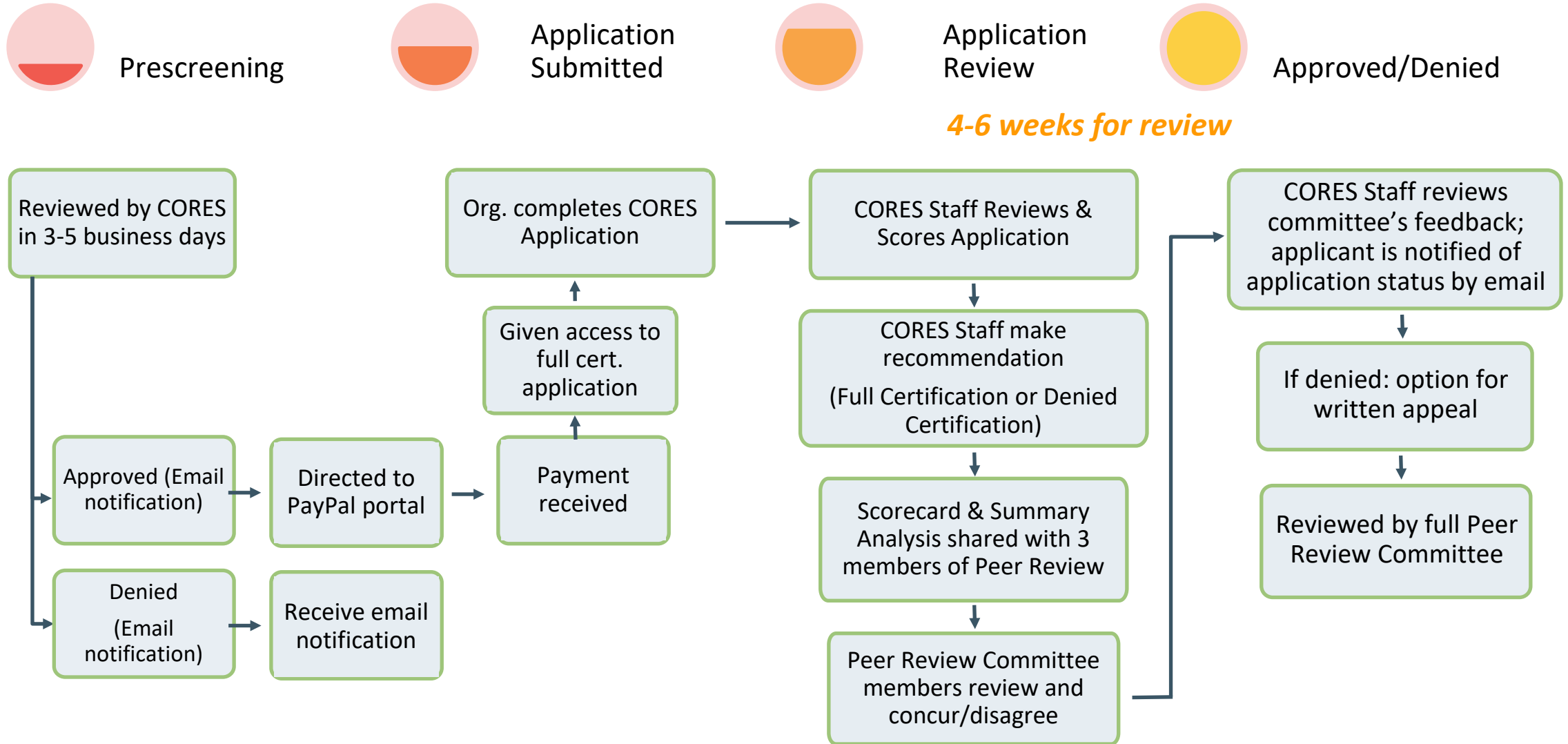
# CORES Rubric Score Cards



Certification Rubrics						
Applicant must achieve the minimum points in each section (as applicable to their service delivery model) and must score a minimum of 40 points total across all sections.						
	DIRECT Model Applicant		HYBRID Model Applicant		THIRD PARTY Model	
	Total Points Available	Req. Points to Pass each section	Total Points Available	Req. Points to Pass each section	Total Points Available	Req. Points to Pass each section
<b>A. Portfolio Profile (#1)</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>1</b>
<b>B. Resident Services Coordination</b>	<b>19</b>	<b>13</b>	<b>22</b>	<b>13</b>	<b>26</b>	<b>17</b>
<i>Resident Services Coordination</i>	11	7	13	8	17	12
<i>Resident Services Coordinators (RSC)</i>	4	3	3	2	4	2
<i>Resident Services Systems</i>	4	3	6	3	5	3
<b>C. Utilizing Information about Residents &amp; the Community</b>	<b>9</b>	<b>4</b>	<b>9</b>	<b>4</b>	<b>9</b>	<b>4</b>
<i>Larger Community/Neighborhood Assessment</i>	4	2	4	2	4	2
<i>Resident Data</i>	5	2	5	2	5	2
<b>D. Resident Services Program Plan</b>	<b>16</b>	<b>10</b>	<b>17</b>	<b>9</b>	<b>17</b>	<b>9</b>
<i>Program Implementation</i>	7	5	8	5	8	5
<i>Partnerships</i>	4	2	4	1	4	1
<i>Resident Engagement</i>	5	3	5	3	5	3
<b>E. Funding &amp; Sustainability of Resident Services</b>	<b>4</b>	<b>2</b>	<b>4</b>	<b>2</b>	<b>3</b>	<b>2</b>
<b>F. Evaluation of Program Success (Impact)</b>	<b>6</b>	<b>3</b>	<b>6</b>	<b>3</b>	<b>5</b>	<b>3</b>



# CORES Application & Review Process



# Mapping the Framework for a System of Resident Services Coordination to the CORES Application

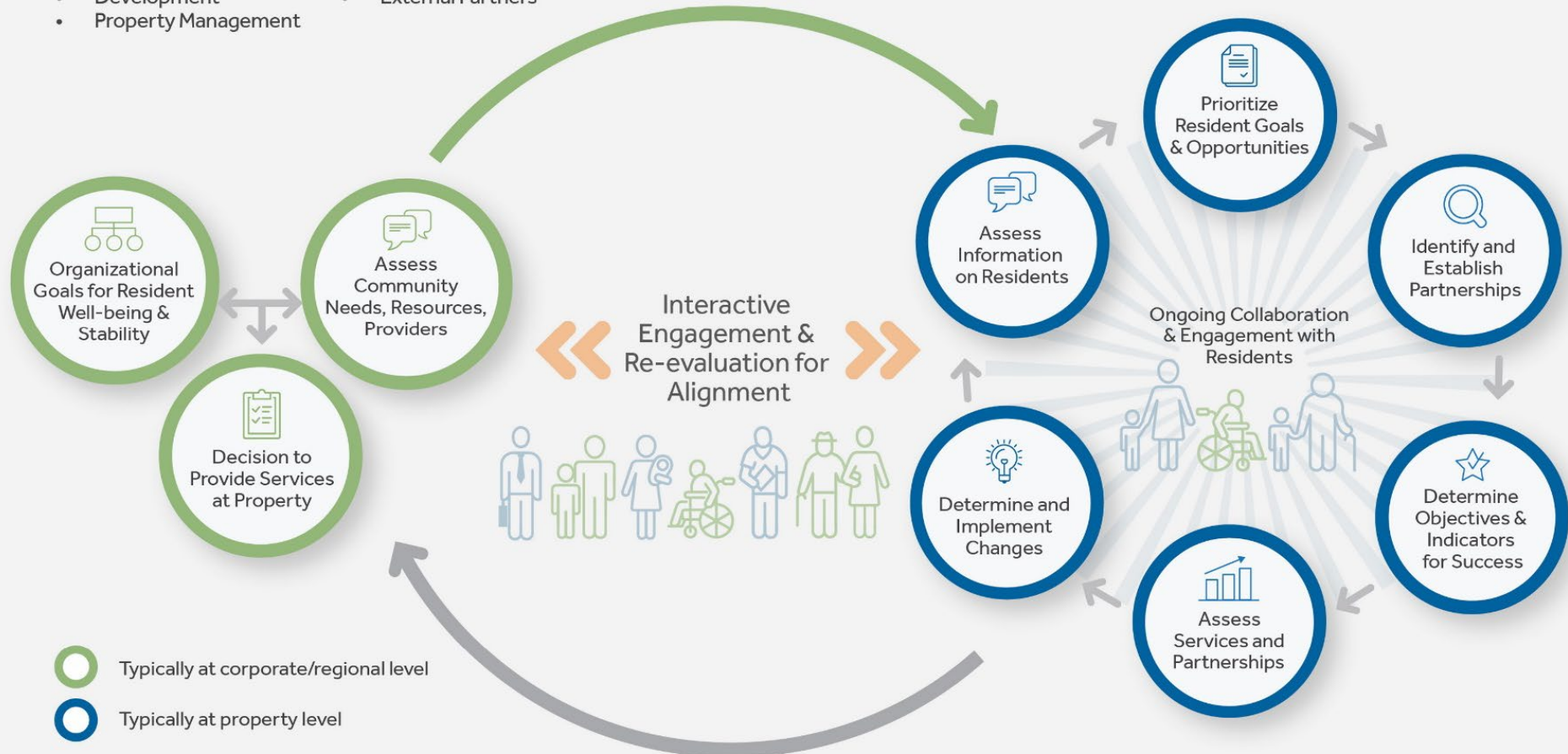
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# Framework for a System of Resident Services Coordination

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# Walking Through the Framework



## Potential Sources of Community Level Data:

- **Direct Resident & Community Input/Feedback**
- **Market Analysis**
- **Local Resource Listings**
- **National Council on Aging**
- **Local Government Agency/Partner**
- **Local, State, or Regional Collaborative**
- **Community Health Needs Assessments**
- **Aunt Bertha or Local 211s**
- **American Community Survey /Census Data**
- **Enterprise 360 Report\* NO LONGER AVAILABLE**
- **Opportunity Atlas**
- **500 Cities Project**
- **Distressed Communities Index**
- **Nation Builder – Voter Registration data**

# Required Documents for CORES



## Documents:

- Organizational Chart\*
- Privacy Protocols for Storing Data Electronically
- RSC Job Description \*
- Organizational Goals, Theory of Change, or Logic Model
- Example Completed Community Scan \*

Items with "\*" are **THRESHOLDS**





# Building, Operating and Evaluating Programs



## Understanding Impact:

- Engagement & Feedback from Residents
- Property and Program Impact Reports
- Partner Data

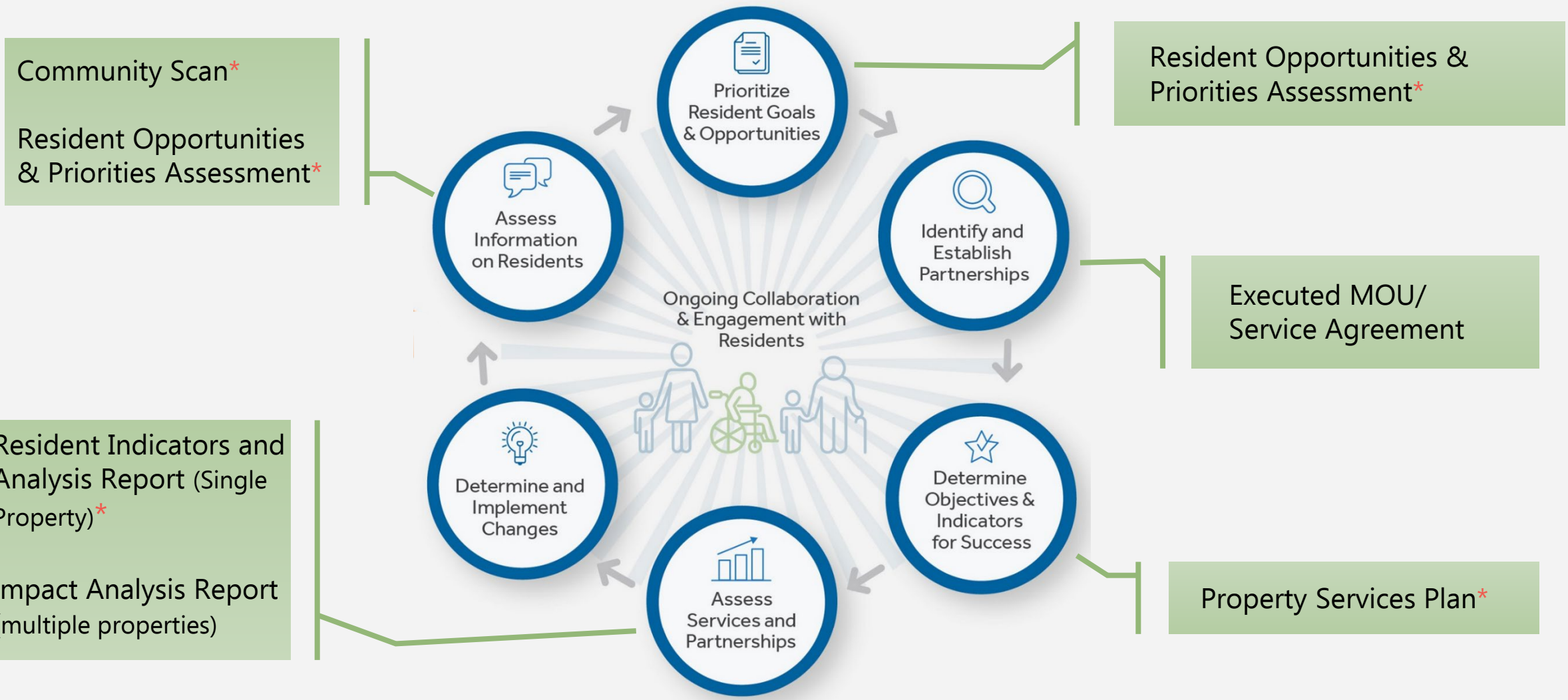


## Prioritizing Resident Goals & Opportunities:

- Property Demographics
- Direct Resident Feedback, Input, Collaboration
- Partner Data



# Required Documents for CORES





# Workshopping Session

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2. Application Eligibility/Threshold Requirements
3. Four Key Documents – Deeper Review
4. Application Process
5. Other?

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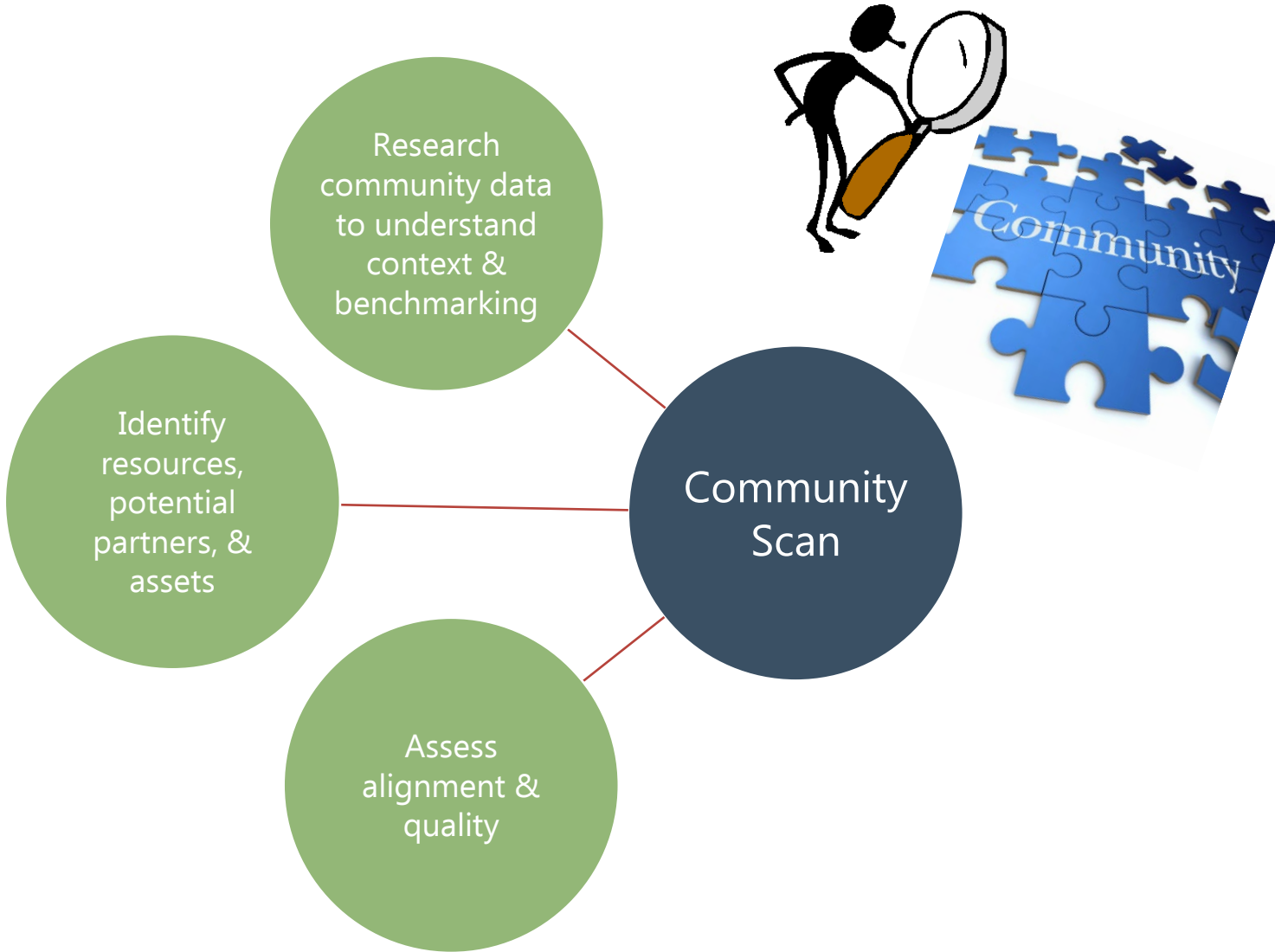
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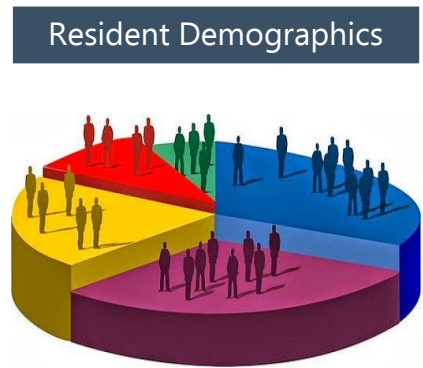
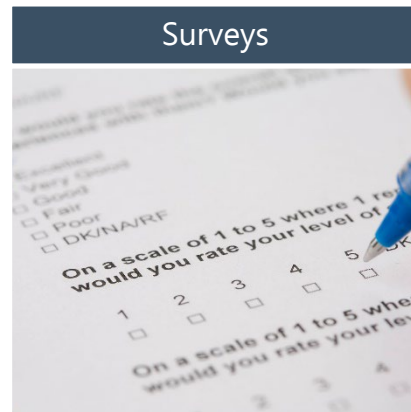
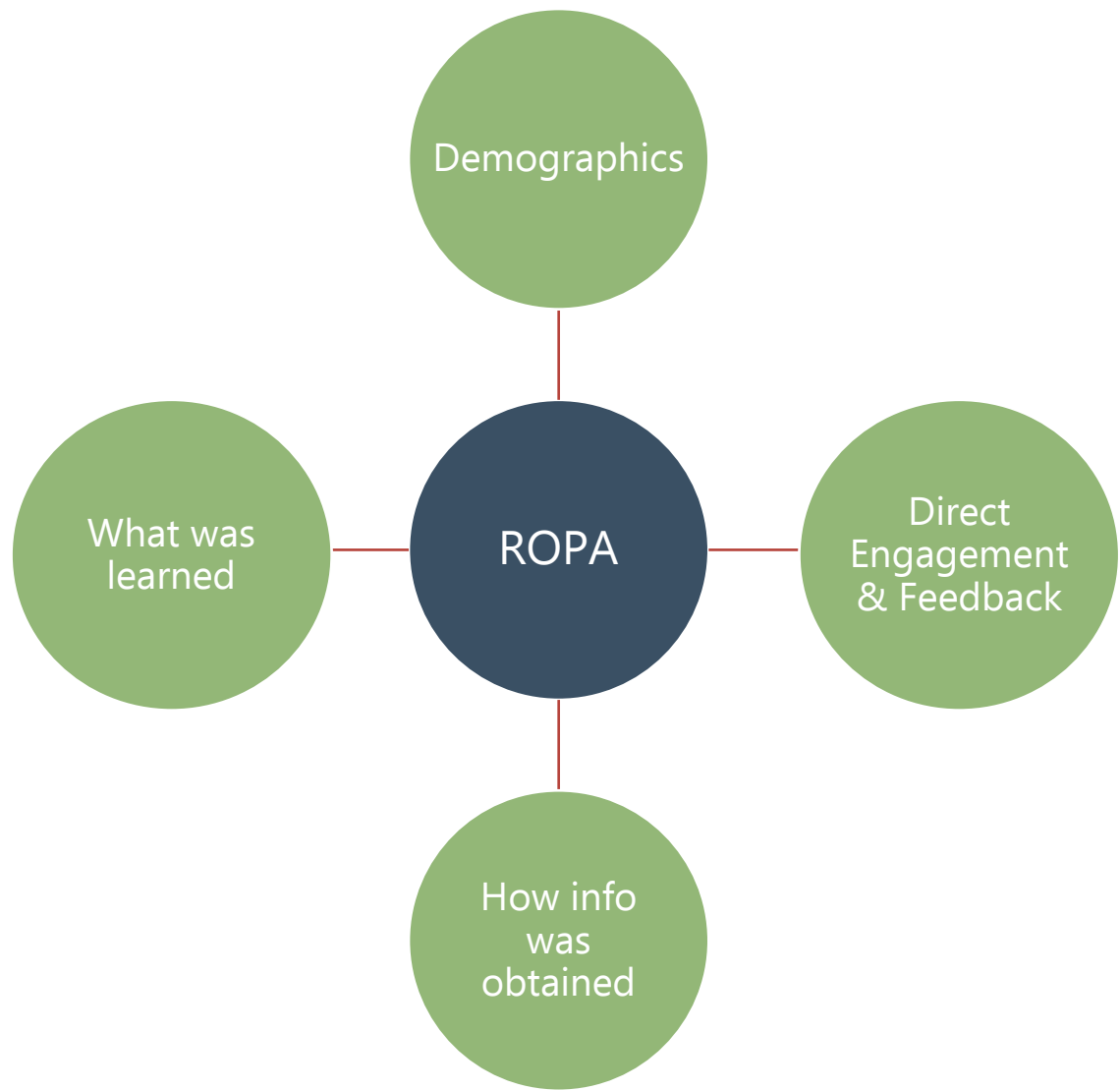
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# Community Scan

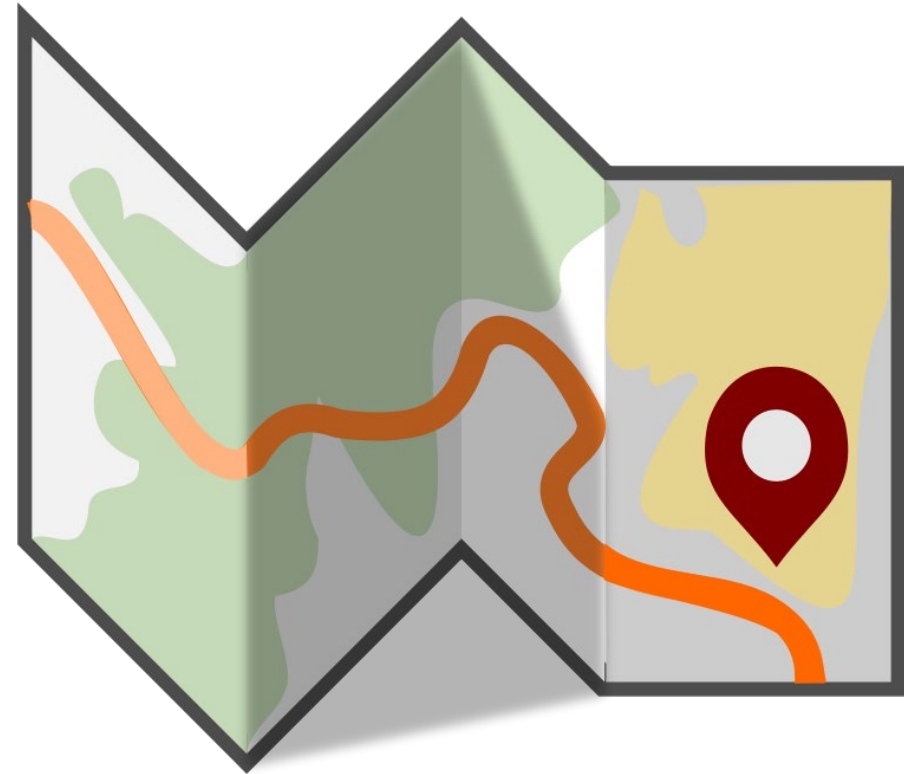


# Resident Opportunities & Priorities Assessment



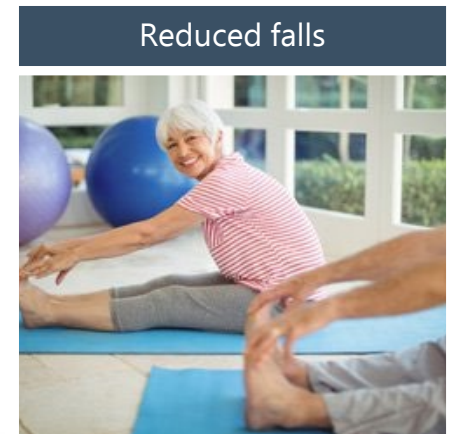
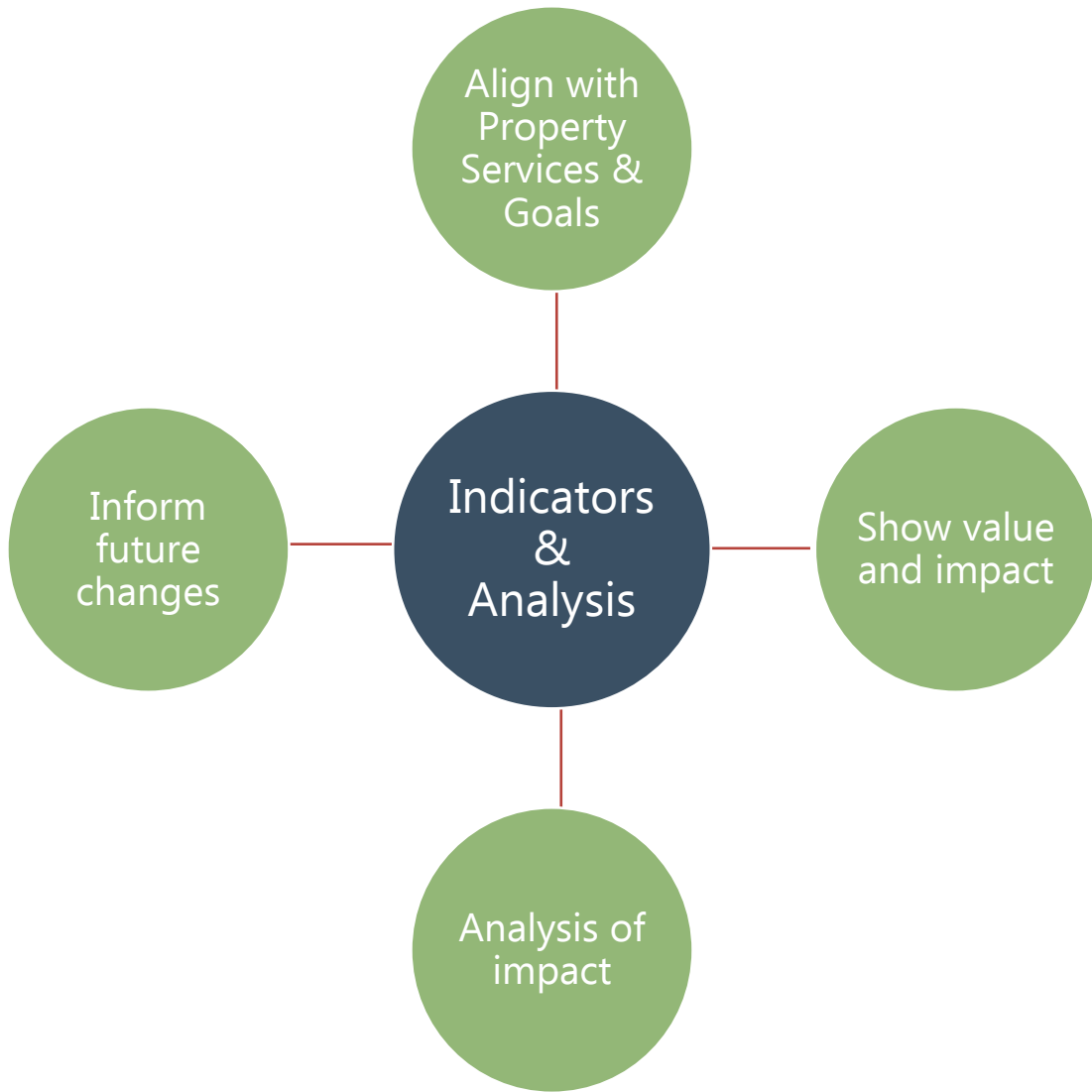


# Property Services Plan

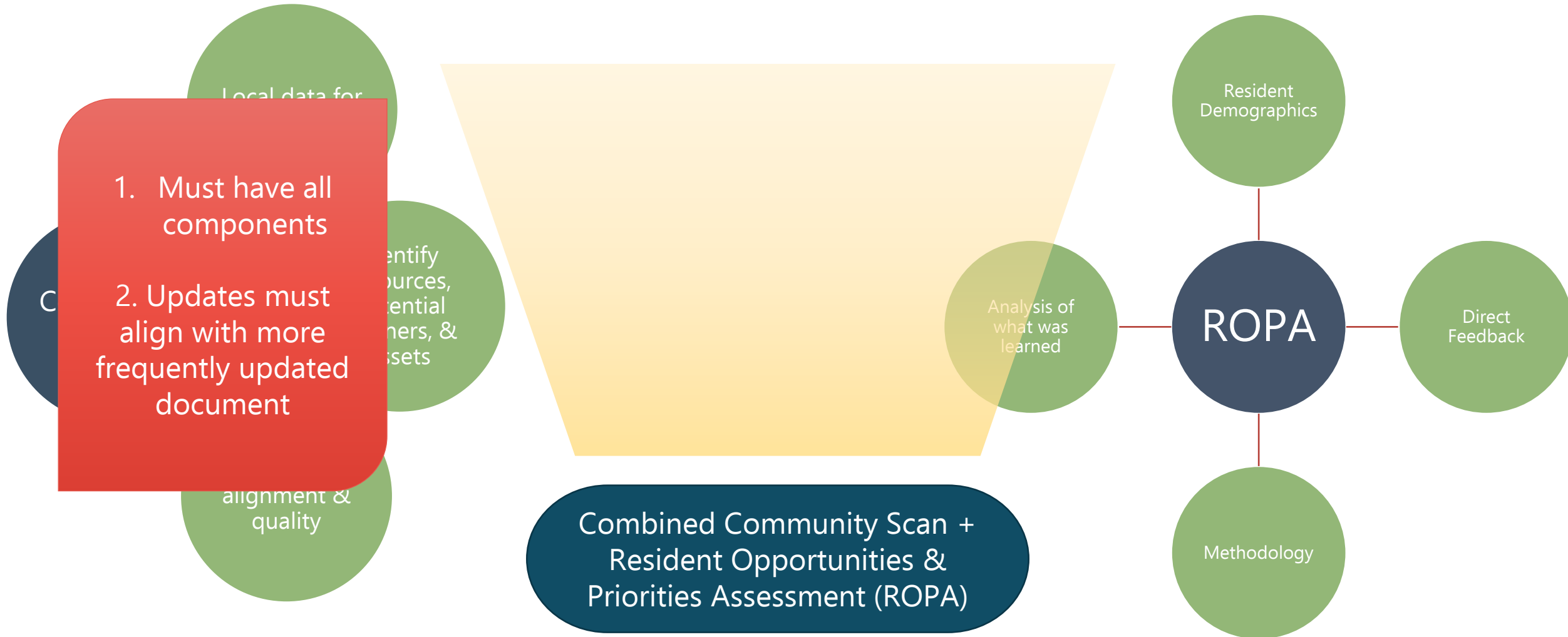




# Resident Indicators & Analysis Report



# Alternative Formats





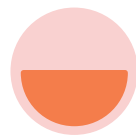
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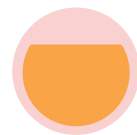
# CORES Application & Review Process



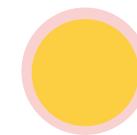
Prescreening



Application Submitted

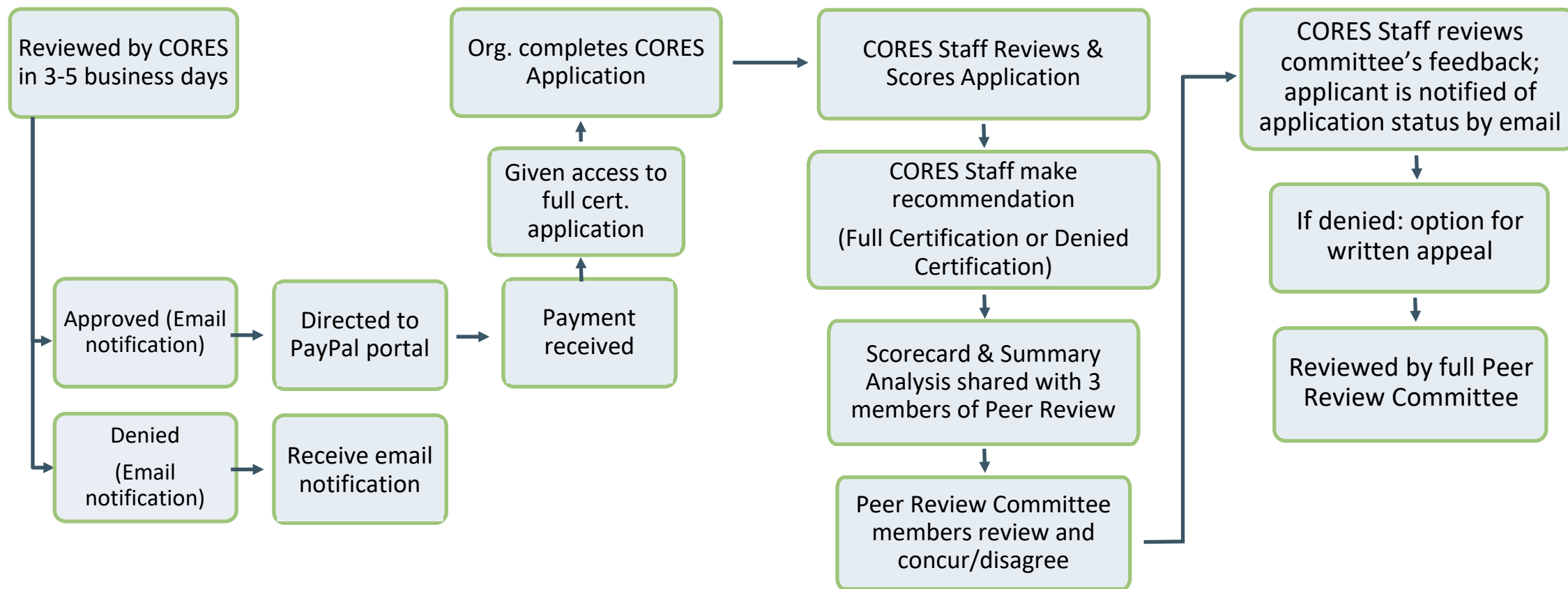


Application Review



Approved/Denied

*4-6 weeks for review*





## Resource Library & COVID 19 Resource Page

- ✓ Practitioner-Developed Templates and Tools
- ✓ New Research and Capacity-Building Resources
- ✓ Updated COVID-related guidance and relevant policy updates



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## Quarterly Newsletters & Webinars

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

<https://coresonline.org/newsletter>

# Resources for Practitioners



<https://coresonline.org/resources>

The screenshot shows the CORES website header with navigation links: About Us, Contact Us, Certified Organizations, and Newsletter Signup. Below the header are three icons: a checkmark for 'CORES', a pencil for 'Apply', and a lightbulb for 'Resources'. A red arrow points from the URL above to the 'Resources' icon. The main content area features a large photo of a diverse group of people, including children and adults. An orange text box over the photo reads: 'CORES organizations are invested in using housing as a platform for opportunity and have a record of providing robust resident services coordination in affordable housing communities.' Below the photo is a dark blue footer with the CORES logo and the text: 'Certified Organization for Resident Engagement & Services' and 'The CORES Certification recognizes owners and third party providers that have developed a robust commitment, capacity, and competency in providing resident services coordination in affordable housing communities.'

**COVID-19 Practitioner's Resource Page:**

<https://coresonline.org/covid-19-resources>

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FILTER BY:

**Keyword Search**

**SHOW RESULTS**

**Topic**

- Any -

**Type**

- Any -

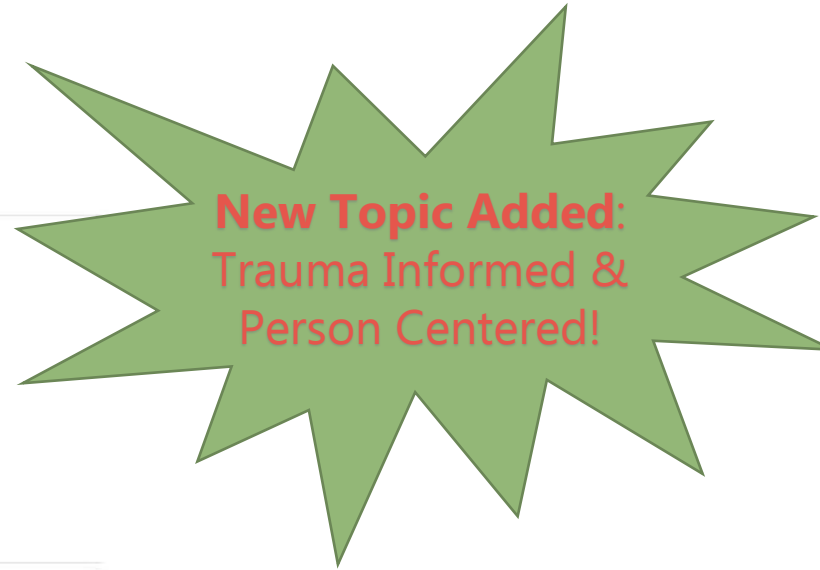
**Title**

A Culture of Caring: A Compendium of Self-Care Tools and Workforce Support Principles for Front-Line Staff in Service-Enriched Housing

ACF Early Childhood Self-Assessment Tool for Family Supportive Housing

Building Financial Capability: A Planning Guide for Integrated Services

- Any -
- Any -
- Capacity-Building Tools**
- Consent Forms/Tools
- CORES Guidance
- Training Resources
- Case Studies and Research
- Data Sharing
- Community Info/Data Sources
- Community Scans/Tools**
- Impact & Outcomes Resources
- Sample Job Descriptions
- Logic Models/Theories of Change
- MOUs
- Privacy Protocols/Privacy Guidelines
- Property Service Plans/Tools**
- Resident Engagement Tools**
- Resident Indicators & Analysis Reports**
- Resident Needs and Opportunity Scans/Tools
- Resident Surveys



Capacity-Building Tools	Research/Report, Toolkit	2015	Prosperity Now; HHS - Office of Community Services
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# Thank you for joining!



**Visit:** [www.CORESONline.org](http://www.CORESONline.org)

**Contact:** [cores@sahfnet.org](mailto:cores@sahfnet.org)

**For questions about Fannie Mae's Healthy Housing Rewards™ Initiative**

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

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