

# Conveying Your True Impact

Using Quantitative and Qualitative Evaluations to Tell Your Story to Key Stakeholders

*Housing California Annual Conference – April 12, 2012*



# Agenda

- Welcome, overview of session objectives and panelist introductions
- Presentation on impact assessment methodology and findings
- What is the value of this research?  
Discussion on the importance of telling your story locally, to funders and nationally
- Open Q&A
- Concluding thoughts

# Session Objectives

- Describe a variety of approaches to display the impact of affordable housing, using both quantitative and qualitative measures
- Present the methodology and findings from a multi-pronged impact assessment conducted by the Cabrillo Economic Development Corporation
- Discuss how this type of assessment can influence funding and policy decisions
- Inspire others to think about new ways to tell their own story of impact

# Panelist Introductions

- Jill Fioravanti, Director of Organizational Planning, Cabrillo Economic Development Corporation (moderator)
- Kirk Lesh, Economist, California Lutheran University Center for Economic Research and Forecasting
- Alexander Russell, Board President, Housing Opportunities Made Easier
- Nancy Conk, Chief Executive Officer, Cabrillo Economic Development Corporation
- Alex Sasayama, Public Affairs and Communications Advisor, NeighborWorks® America
- Dave Brown, Executive Director, National NeighborWorks® Association

# CEDDC Organizational Overview



Incorporated in 1981

Community development corporation  
serving Ventura and Santa Barbara  
Counties

FY 2012: approx. 90 employees, \$7.6M  
budget

Major business lines:

- *Real estate development & construction*
- *Property management*
- *Home ownership education, counseling and lending*
- *Community building and neighborhood revitalization*

# Impact Assessment Background

- Conducted in Spring/Summer 2011, commemorating CEDC's 30<sup>th</sup> anniversary
- Incorporated three evaluation components:
  1. Contribution to the local economy and local job creation
  2. Impact on the social and financial condition of individuals and families living in CEDC rental and for-sale homes and/or served by our NeighborWorks® HomeOwnership Center
  3. Role in shaping local housing policy and public perceptions of affordable housing
- Involved working closely with a local university (California Lutheran University, CLU) and a local housing advocacy organization (Housing Opportunities Made Easier, HOME)

# Part 1: What is CEDC's Impact?

Impact on the economy & jobs:  
methodology and approach

Impact on social and financial well-being:  
methodology and approach

Findings: economic and social/financial  
impact assessments

Impact on housing policy and public  
perception of affordable housing

# CEDC's Impact on the Local Economy and Jobs: Methodology and Approach

- Presenter: Kirk Lesh, CLU Center for Economic Research and Forecasting (CERF)
- Presentation points:
  - CERF's approach to evaluating economic impact
  - The use of IMPLAN as an economic modeling tool
  - Overview of direct, indirect and induced economic impact as channels to generate economic activity
  - CEDC's economic drivers compared to that of other housing organizations



# CEDC's Impact on Families' Social and Financial Well-Being: Methodology and Approach

- English and Spanish surveys distributed to:
  - All families living in CEDC's affordable rental homes (approx. 640 households)
  - All families who purchased a home (CEDC developed and other new or existing homes) in the last seven years
  - A subset of households who received homebuyer education or counseling services from CEDC's HomeOwnership Center (HOC) since 2008
- Incentives offered to encourage higher response rates
- CEDC's Property Managers were instrumental in increasing rental tenant responses

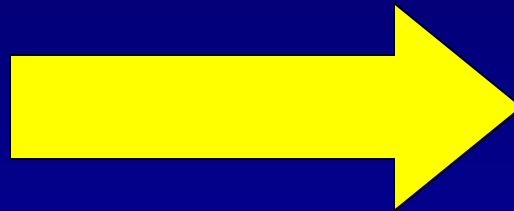
# CEDC's Impact on Families' Social and Financial Well-Being: Methodology and Approach

- Survey design built upon previous impact assessments and questions available through Success Measures, and aimed to address change in condition as well as current status
- Open- and closed-ended questions around:
  - Goals for the future
  - Neighborhood condition and safety
  - Neighborhood and community involvement
  - Financial management
  - Saving money
  - Education
- HOC survey included supplemental sections for renters and homeowners

# CEDDC's Annual Economic Impact

For Every  
**\$1.00**

Spent in  
Operating  
and Capital  
Expenses



CEDDC Generates

**\$1.37**

In Economic  
Impact

# CEDC's Economic Impact

## Other Findings:

- Approximately \$14 million in economic output is generated annually for Ventura County
- 780 jobs were created in 2011 due to new construction
- The taxes generated by annual economic activity of CEDC almost entirely offsets its annual total property tax exemption

# CEDC's Impact on Rental Clients

*Survey sent to CEDC's 646 rental households (293 responded):*



- Over half (54%) of respondents with school-age children say their children's grades have improved since moving into a CEDC home
- Seventy percent (70%) say they hope their children will obtain a graduate degree
- The majority (52%) of respondents say their confidence in helping their children reach their goals has increased

# CEDC's Impact on Rental Clients

- More than two-thirds (68%) of respondents say their current neighborhood's physical condition is better than their previous neighborhood
- Seventy-two percent (72%) of respondents say their current home is in better condition than their previous home
- More than three quarters (77%) of respondents with children believe their children are safe in their current neighborhood; 66% believe their children are safer now than before

*How would your life be different if you had not moved into a CEDC home?*

*"I would be paying much higher rent; neighbors would be louder and less considerate; I would not feel safe in my surroundings."*

# CEDC's Impact on Homeownership Clients

*Survey sent to 530 households recently served by the CEDC NeighborWorks® HomeOwnership Center (83 households responded):*

- Almost half of respondents (47%) claimed an increase in confidence about their financial situation since receiving HOC services
- Eighty-nine percent (89%) said their understanding of the home purchasing process had increased since receiving HomeOwnership Center services
- More than three-quarters of respondents (77%) had clearly defined financial goals for their family's future

# CEDC's Impact on Homeownership Clients



"We never thought that we would have our own house, but with [the] HOC's services it was possible. Thanks a lot."  
– HOC Client

"CEDC helped us get a modification on our home loan that helped us stay in our home, and we are forever grateful for this." – HOC Client



# Impact on Public Policy and Perceptions of Affordable Housing

- Presenter: Alexander Russell, Board President, Housing Opportunities Made Easier (HOME)
- Presentation Points:
  - Background on HOME and the annual Ventura County Housing Conference series
  - Survey questions and distribution methodology
  - Policy survey: findings and takeaways

# Impact on Public Policy and Perceptions of Affordable Housing

## Housing Opportunities Made Easier (HOME)

- **Mission:** create a positive environment for workforce housing development in Ventura County through programs designed to educate and engage members of local communities

## Annual Ventura County Housing Conference

- Hosted by HOME, Cabrillo Economic Development Corporation, & the Ventura County Economic Development Association
- Purpose: Provide a forum for stakeholders to discuss key housing-related issues, share ideas, and provide solutions to problems that impede affordable housing
- Average attendance: 235 people

# Impact on Public Policy and Perceptions of Affordable Housing

## Survey

- HOME/CEDC conducted an online survey (Aug. 2011) to determine the impact that the housing conference series has had on public policy and perceptions of affordable housing
- 10 questions
- Mix of closed and open-ended questions
- Average number of respondents per question:  
~ 50

# Impact on Public Policy and Perceptions of Affordable Housing

## Survey Results: What is the most significant community or policy outcome of the conference series?

- Keeping affordable housing on the radar of policymakers/implementers
  - “People that I have served on panels with have called elected officials when an important vote was coming up.”
  - “I always get new perspectives to consider at these conferences, which help me evaluate policies and projects that come before me on the Ventura Planning Commission.”
- Debunking myths
- Creation of the Ventura County Housing Trust Fund

# Impact on Public Policy and Perceptions of Affordable Housing

## Takeaways

Difficult to quantify effect of advocacy on public policy but ...

- Keeping affordable housing on the radar of policymakers makes a difference in effecting change
- With community education, public-private partnerships can be created that move affordable housing forward

## Part 2: What is the value of this research?

- Refining our message: telling our story from the CDC perspective
- Making a case: the value that funders place on impact data
- Sending a message: the importance of impact data in national affordable housing advocacy

# Refining Our Message: Telling Our Story from the CDC Perspective

- Presenter: Nancy Conk, Chief Executive Officer, CEDC
- Presentation Points:
  - Our message must resonate beyond the altruistic
  - Affordable housing is “a good investment,” not just “a good cause”
  - Hard data has the potential to influence a variety of stakeholders
  - Data alone cannot tell our story

# Refining Our Message: Telling Our Story from the CDC Perspective

- Child poverty increased 7% in California between 2001-2010
- CEDC's impact study demonstrated that the majority of children (54%) were doing better in school after moving into an affordable home
- The study also evidenced that 70% of residents hoped their children would one day attain a graduate degree
- There is a strong link between a good start in life and self-sufficiency later in life





# Making a Case: The Value that Funders Place on Impact Data

- Presenter: Alex Sasayama, NeighborWorks® America (NWA)
- Presentation Points:
  - Background on NWA
  - Overview of Organizational Underwriting
  - Role of qualitative and quantitative data in consideration for operational funding

# What is Organizational Underwriting?

- Organizational Underwriting (OU) is the process that NeighborWorks<sup>®</sup> America uses to determine the level of our investment in NeighborWorks<sup>®</sup> organizations.
  - Financial assistance - expendable
  - Technical assistance

# Organizational Underwriting

## Guiding Principles

- Decisions are not based on a simple ranking of applications.
- Decisions are based on all available information.
- Decisions are grounded in an assessment of the whole organization.
- Decisions are considered in the context of the conditions and needs of the community and the organization's history and stage of development.

# Organizational Underwriting Evaluation Process

- Used by District as well as national initiative staff
- Staff evaluate the NWO plans and other submitted OU information as well as consider the performance of the organization as reported by the NWO during the year:
  - *OAD Reviews*
  - *Quarterly Production Reports*
  - *Annual Survey*
  - *Pipeline Survey*
  - *Community-Level Outcomes Survey*
  - *Financial Audit Reviews*
  - *Initiative Reports*
  - *District Experience*

# Sending a Message: Impact Data and National Affordable Housing Advocacy

- Presenter: Dave Brown, National NeighborWorks<sup>®</sup> Association (NNA)
- Presentation Points:
  - Background on NNA, PLACE
  - FY 2012 Platform: Home Matters
  - The importance of data in national advocacy and lobbying
  - What's next: PLACE and messaging the greater impact of affordable housing



# Home Matters.

Investing in creating homes means investing in America:  
our jobs, our health, our economy, our education.

# Q&A and Open Discussion

# Wrap-Up – Considerations for...

- Community development corporations and housing organizations:
  - How can you better tell your story of impact, through quantitative and/or qualitative data?
  - Who can you partner with (universities, advocacy groups) to assist you?
- Funders:
  - What value do you place on impact data in making your funding decisions?
  - Are there opportunities to support your grantees in conducting impact assessments?



# Wrap-Up – Considerations for...

- Advocates:
  - What kind of data would aid you in making your case?
  - Who can you work with to gather this type of information?
- Local government staff:
  - How can this type of economic and jobs data inform your work?
  - How can CDCs and housing organizations work together to use impact assessments to revitalize communities?

Please complete the following sentence on the index card provided:

“If I could have asked one question or said one thing in regards to what I just heard, it would be...”

# Contacting Us

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*bringing community home*

