



Measuring CLT Performance

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Why Are We Interested in Measuring the Performance of CLTs?

To assess whether we are hitting our organizational goals

- **Provide high quality service**
 - customer satisfaction
 - clients (residents, applicants, service recipients)
 - funder satisfaction
- **Efficiency of delivery**
 - time
 - money

Other reasons to measure

- To improve quality, quantity, and efficiency of goods and services delivered
- To support advocacy efforts
- To help secure funding (grants/donations/loans)
- Because people require us to (funders, regulators, etc.)

Who's the Audience for All This Measurement?

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Internal Audiences: Accountability

- These folks inside our organizations need to need to make sure we are doing our job:
 - Staff
 - Board
 - Residents/people we serve
 - Membership
 - building trust and showing transparency

External Audiences

Accountability

- These folks want to make sure we are abiding by the law and wisely using the funds given to us:
 - Regulators
 - Funders
 - Larger community
 - neighborhood
 - city
 - county
 - region

External Audiences

Telling Our Story

- These are the folks who we want to support us based on compelling stories about our work:
 - Potential buyers/renters
 - Funders
 - Policy makers
 - Elected officials
 - Larger community
 - neighborhood
 - city
 - county
 - region

What Are the Core Areas of CLT Focus?

And what are the ways we can measure our performance in those areas?

Protecting long-term affordability of housing

- **Ways to measure**

- Compared to market-rate housing
- Compared to median income
- Need for continuing infusions of subsidy to maintain affordability
- Demonstrating how subsidy works harder over time

Serving people who can't afford market-rate housing

- **Ways to measure**

- median income of persons served (compared to area median income)

Providing opportunities for wealth building

- **Ways to measure**

- return on equity investment (down payment from own funds), as compared to
 - market-rate housing
 - stock market
 - rental housing

Providing high quality, energy efficient housing

- **Ways to measure**
 - energy efficiency
 - green building practices
 - cost of maintenance over time

Maximizing homeowner/tenant success

- Rates of foreclosure and default (compared to market-rate)
- Rates of eviction (compared to market rate)
- For some things, it can be hard to tie success to living in a CLT home:
 - change in educational attainment
 - change in income

Other things we could try to measure

- **Homeowner engagement** – looking at factors which could include:
 - participation in committees, board of directors, social events, trainings,
 - participation in larger community
- **Return on Investment (ROI)**
 - for CLT itself
 - for funders

Striking a balance

- **Minimizing the burden of data collection**
 - Not having to track a lot more information than you would otherwise need to for your day to day work
- **Capturing the data you need/want to measure in order to report out to key internal and external audiences**

Weaver Reporting Module

DEMOGRAPHICS

STANDARDIZED REPORTS

- **Race:** percentage representation by program area and age
- **Hispanic Status:** percentage representation by program area and age
- **Skills:** listing of contacts by skill area
- **Accessibility:** (1) listing of all contacts with accessibility needs (alphabetical); (2) listing of all contacts grouped by accessibility needs
- **Language:** (1) report that lists names associated with each language (and degree of fluency); (2) report that lists all contacts in need of language translation services, determined by (a) primary language other than English, and (b) low degree of fluency in English.
- **Education:** percentage by educational level