

# SUCCESS MEASURES®

## DATA COLLECTION TOOLS BY CATEGORY

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## COMMUNITY AND RESIDENT ENGAGEMENT MEASUREMENT TOOLS

The Success Measures Community and Resident Engagement Tools highlight the social cohesion that results from resident participation in community and civic life. The tools look at ways residents develop leadership skills and work together on important community issues, as well as how nonprofit organizations are working collaboratively to address community needs.

Tool Title	Description
<b>Accountability to Community</b>	Documents perceptions about resident and stakeholder involvement in organizational decision-making and leadership's responsiveness to community members.
<b>Awareness of Community and Organization's Effort</b>	Documents residents' definitions of their neighborhood or community and awareness about organization's programs and community-building efforts.
<b>Capacity for Collective Action – Short Version</b>	Documents perceptions about how residents and community-based organizations work together to resolve issues or achieve change. ( <i>Short version</i> )
<b>Capacity for Collective Action</b>	Documents perceptions about how residents and community-based organizations work together to resolve issues or achieve change.
<b>Civic Engagement and Political Participation</b>	Documents involvement in community affairs, activities, and organizations
<b>Evidence of Influence: Initiative Activity Summary</b>	Documents the activities and events related to a specific issue or initiative and any change in responses from government, public officials, or other organizations.
<b>Evidence of Influence; Media Coverage Summary</b>	Documents the print, television, radio, and web-based media coverage of an organization's initiatives and messages.
<b>External Perception of the Community</b>	Documents perceptions about safety, services, homes, resident involvement and changes in the community.
<b>Leadership Development</b>	Documents participant's assessment of leadership development training and leadership capacity and skills before and after training.
<b>Organizational Influence: Issues, Campaigns, Initiatives, or Actions</b>	Provides format to guide discussion about how individuals involved in an organization's campaign, initiative, or action feel about its effectiveness.
<b>Organizational Influence: Issues, Campaigns, Initiatives, or Actions</b>	Provides discussion questions to explore how individuals involved in a specific-issue advocacy campaign, initiative, or action feel about its effectiveness.
<b>Organizations' Perceptions of Collaboration Effectiveness</b>	Documents assessment of effectiveness, accomplishments, and future improvements for cross-organizational collaboration.
<b>Participation in Community Organizations</b>	Documents the types of community organizations or activities, and the level of resident participation in them. ( <i>This tool documents up to two organizations; to add more organizations, use Participation in Community Organizations –Module: Additional Organizations.</i> )
<b>Participation in Community Organizations – Module: Additional Organizations</b>	Module for adding additional organizations to Participation in Community Organizations.
<b>Participation in Community Organizations – Summary</b>	Documents community participation in meetings, events and other organization activities. (Includes worksheet to track detail.)

<b>COMMUNITY AND RESIDENT ENGAGEMENT, page 2</b>	
<b>Representation of Community Interests: Media Interview Guide</b>	Provides interview questions to learn about the types of information sources the media rely on when covering local issues or problems
<b>Representation of Community Interests: Organization Staff and Board Focus Group</b>	Provides discussion questions to explore perceptions about the effective representation of neighborhood or community issues.
<b>Resident Confidence in the Community</b>	Documents attitudes and perceptions about a neighborhood and its future.
<b>Resident Satisfaction with Neighborhood</b>	Documents concerns and satisfaction with a variety of quality-of-life factors in a neighborhood.
<b>Resident Satisfaction with Neighborhood – Short Version</b>	Documents concerns and satisfaction with a variety of quality-of-life factors in a neighborhood. <i>(Short version)</i>
<b>Sense of Community</b>	Documents relationships and communication with neighbors and participation in community activities.
<b>Sense of Community – Short-Version</b>	Documents relationships and communication with neighbors and participation in community activities. <i>(Short version)</i>
<b>Sense of Social Cohesion</b>	Documents feelings of belonging, trust, and reliance within neighborhood.
<b>Sense of Social Cohesion – Short Version</b>	Documents feelings of belonging, trust, and reliance within neighborhood. <i>(Short version)</i>
<b>Social Connectedness</b>	Documents interaction with and reliance on neighbors and sense of community connection.
<b>Social Networks and Informal Exchange – Connections</b>	Documents feelings about and levels of connection to social networks.
<b>Social Networks and Informal Exchange – Transactions</b>	Documents participation in informal non-monetary transactions such as bartering or exchanging goods or services.

## COMMUNITY REVITALIZATION MEASUREMENT TOOLS

The Success Measures Community Revitalization Tools provide an inventory of the physical conditions of communities in both vacant and occupied properties, and document the changes in residents' quality of life. The tools focus on both residential and commercial areas that make up a vibrant community and address availability and access to amenities and services.

Tool Title	Description
<b>Block Conditions</b>	Documents overall physical conditions of the residential, commercial and public spaces in a block.
<b>Block Conditions – Short Version</b>	Documents some of physical conditions of the residential, commercial and public spaces in a block.
<b>Building Conditions</b>	Documents building conditions, including exterior, features, maintenance, and overall attractiveness.
<b>Built Environment: Block Conditions</b>	Documents physical conditions on specific parcel, including vacant lots, cleanliness, and public infrastructure.
<b>Community Space</b>	Documents physical conditions of community space and vacant land at the parcel level.
<b>Duration of Residence and Resident Stability</b>	Documents the length of time and reasons why people have lived in a neighborhood, community or housing unit.
<b>Duration of Residence and Resident Stability – Census Data</b>	Documents Census data on the length of time people have lived in current housing unit.
<b>Extent to Which Local Businesses Meet Basic Community Needs</b>	Documents whether residents can obtain needed goods and services from local businesses.
<b>External Perception of the Community</b>	Documents perceptions about safety, services, homes, resident involvement and changes in the community.
<b>Neighborhood Security – Residential</b>	Documents perceptions of safety and security at a neighborhood or community level.
<b>Neighborhood Security – Residential – Short Version</b>	Documents perceptions of safety and security at a neighborhood or community level (short version),
<b>Non-Residential and Mixed-Use Property – Vacant Property Only</b>	Documents physical conditions of vacant non-residential and mixed-use properties.
<b>Non-Residential Property</b>	Documents physical conditions of non-residential and mixed-use properties by parcel.
<b>Participation in Community Organizations</b>	Documents the types of community organizations or activities, and the level of resident participation in them. <i>(This tool documents up to two organizations; to add more organizations, use 'Participation in Community Organizations – Module – Additional Organizations'.)</i>
<b>Participation in Community Organizations – Module: Additional Organizations</b>	Module for adding additional organizations to Participation in Community Organizations.
<b>Participation in Community Organizations – Summary</b>	Documents community participation in meetings, events and other organization activities. (Includes worksheet to track detail.)
<b>Perception of Neighborhood - Housing Quality</b>	Documents perceptions of condition and appearance of homes.
<b>Perception of Neighborhood – Physical Conditions</b>	Documents perceptions about the physical appearance of a neighborhood, including housing, community facilities, streetscape, commercial areas and green spaces
<b>Quality of Life</b>	Documents satisfaction with community life.
<b>Renter Interest in Purchasing a Home – Module</b>	Documents reasons why renters have or have not purchased a home in their community. <i>(Module can be added to any tool.)</i>

<b>COMMUNITY REVITALIZATION, page 2</b>	
<b>Representation of Community Interests: Community Resident Focus Group</b>	Provides discussion format and questions to explore most important community issues.
<b>Representation of Community Interests: Community Resident Survey</b>	Documents the most important community issues.
<b>Reputation of Schools – Module</b>	Documents residents' assessments of schools (pre-school through college) in the community. ( <i>Module can be added to any tool.</i> )
<b>Resident Confidence in the Community</b>	Documents attitudes and perceptions about a neighborhood's future.
<b>Resident Experience in the Community</b>	Documents activity involvement, services, safety, changes in community, and household composition,
<b>Resident Satisfaction with Neighborhood</b>	Documents concerns and satisfaction with quality-of-life factors in a neighborhood.
<b>Resident Satisfaction with Neighborhood – Short Version</b>	Documents concerns and satisfaction with quality-of-life factors in a neighborhood. ( <i>Short version</i> )
<b>Residential Property</b>	Documents physical conditions of residential property at the parcel level.
<b>Residential Property – Vacant Property Only</b>	Documents conditions of vacant residential properties at parcel level.
<b>Sense of Community</b>	Documents relationships and communication with neighbors and participation in community activities.
<b>Sense of Community – Short Version</b>	Documents relationships and communication with neighbors and participation in community activities. ( <i>Short version</i> )
<b>Sense of Social Cohesion</b>	Documents feelings of belonging, trust, and reliance within neighborhood.
<b>Sense of Social Cohesion – Short Version</b>	Documents feelings of belonging, trust, and reliance within neighborhood. ( <i>Short version</i> )
<b>Sense of Well-Being</b>	Documents feelings of satisfaction and connection in community.
<b>Social Connectedness</b>	Documents interaction and relationships with neighbors.
<b>Vacant Land</b>	Documents physical conditions of abandoned vacant land at the parcel level.
<b>Vacant Land Analysis</b>	Documents staff analysis of vacant land.
<b>Vacant Non-Residential and Mixed-Use Property Analysis</b>	Documents staff analysis of vacant non-residential and mixed-use property.
<b>Vacant Residential Property Analysis</b>	Documents staff analysis of vacant residential property
<b>Visual Assessment of Housing Quality – Exterior and Interior</b>	Documents visual assessment of both exterior and interior housing conditions.
<b>Visual Assessment of Housing Quality – Short Version, Exterior</b>	Documents visual assessment of only exterior housing conditions.
<b>Visual Attractiveness of Neighborhood</b>	Documents observations about the overall physical conditions and visual attractiveness of a neighborhood.

**ECONOMIC DEVELOPMENT  
MEASUREMENT TOOLS**

The Success Measures Economic Development Tools assess the impact of job training and readiness programs on residents and the community. The feedback can help inform residents' expectations of their current community and assist in marketing efforts toward potential future residents.

<b>Tool Title</b>	<b>Description</b>
<b>Attitudes Toward Entrepreneurship</b>	Documents attitudes about entrepreneurship.
<b>Employment and Income from Job Training</b>	Documents job placement, retention, employment stability and wage progression among training participants.
<b>Extent to Which Local Businesses Meet Basic Community Needs</b>	Documents whether residents can obtain necessary goods and services from local businesses and service providers.
<b>Skills Acquisition – Basic Job Readiness</b>	Documents and calculates changes in participant's skill levels, job readiness, income levels, and employment status after participating in training program.
<b>Skills Acquisition – Basic Job Readiness Assessment</b>	Documents assessment by program staff or joint staff/participant of participant's skill levels and job readiness.
<b>Trainee Expectations of Job Training and Placement</b>	Documents trainee's expectations of job training/placement, employment readiness, and skill area challenges.
<b>Trainee Mid-Point Evaluation of Job Training and Placement</b>	Documents trainee's mid-point perceptions of job training/placement programs and changes in employment skills.
<b>Trainee Post-Training Evaluation of Job Training and Placement</b>	Documents trainee's post-training perceptions of job training/placement programs and changes in employment skills.



**FINANCIAL EDUCATION AND CAPABILITY  
MEASUREMENT TOOLS - ADULT**

The Success Measures Financial Education and Capability Tools document changes in consumers' financial attitudes, behaviors, and resilience resulting from a broad array of financial capability programs. Examples of programs included are financial coaching, financial education, housing, foreclosure mitigation, credit counseling, and asset-building efforts, such as Individual Development Accounts.

<b>Tool Title</b>	<b>Description</b>
<b>Asset Cushion - Access to Resources</b>	Documents access to and use of credit cards, debit cards, and pre-paid cards.
<b>Asset Cushion – Health Care and Will</b>	Documents access to and use of health care, and use of a will to plan for disposition of assets.
<b>Asset Cushion – Insurance and Safeguards</b>	Documents access to and use of insurance.
<b>Asset Cushion – Status</b>	Documents use of credit, cash, and savings vehicles.
<b>Attitudes Toward Credit and Debt – Importance</b>	Documents feelings about taking on debt for personal expenses, having good credit, and paying back loans.
<b>Attitudes Toward Credit and Debt - Information</b>	Documents source of information about credit and debt, knowledge about and satisfaction with personal credit score.
<b>Attitudes Toward Credit and Debt – Self-Assessment</b>	Documents attitudes about credit and debt, avoiding debt, and confidence in paying bills on time.
<b>Attitudes Toward Entrepreneurship</b>	Documents attitudes about entrepreneurship.
<b>Attitudes Toward Financial Situation - Future</b>	Documents attitudes or expectations for changing or improving financial future.
<b>Attitudes Toward Financial Situation - Security</b>	Documents definition of and feelings about financial security.
<b>Attitudes Toward Having Enough</b>	Documents assessment of financial stability and feelings about sharing with others.
<b>Attitudes Toward Homeownership</b>	Documents attitudes about homeownership.
<b>Attitudes Toward Saving – Importance</b>	Documents motivations and goals for saving, including lifecycle events.
<b>Attitudes Toward Saving – Information and Planning</b>	Documents methods for obtaining information about saving and personal plans and timeframe for saving
<b>Attitudes Toward Saving – Self Assessment</b>	Documents feelings about and ability for saving.
<b>Attitudes Toward Spending - Importance</b>	Documents key monthly expense and personal prioritization of items.
<b>Attitudes Toward Spending – Self-Assessment</b>	Documents respondent's feelings about being a smart spender.
<b>Attitudes Toward Use of Financial Resources - Importance</b>	Documents attitudes about financial investment activities and different forms of payment.
<b>Attitudes Toward Use of Financial Resources – Information</b>	Documents source of information about financial resources and ability to explain financial resources to friends.
<b>Attitudes Toward Use of Financial Resources – Insurance</b>	Documents attitudes about having various forms of insurance for oneself and family.

<b>FINANCIAL EDUCATION AND CAPABILITY – ADULTS, page 2</b>	
<b>Attitudes Toward Use of Financial Resources – Self-Assessment</b>	Documents feelings about investing and satisfaction with current investments.
<b>Bill Payment Behavior - Future</b>	Documents thoughts about managing possible future inability to pay all bills on time.
<b>Bill Payment Behavior - Past</b>	Documents how situation in the past year was managed when bills could not be paid on time.
<b>Bill Payment Behavior – Types and Methods</b>	Documents the types of regular bills received and how they are paid.
<b>Building and Managing Credit – Credit Cards</b>	Documents how credit cards are used and paid, and how late fees or inability to pay bills on time are managed.
<b>Building and Managing Credit – Credit Report and Score</b>	Documents familiarity with credit score or report and whether there has been a filing for bankruptcy in the past ten years.
<b>Building and Managing Credit – Debit Cards</b>	Documents how debit cards are used and why used instead of other methods of payment.
<b>Building and Managing Credit – Prepaid Cards</b>	Documents how prepaid cards are used and why used instead of other payment methods.
<b>Communally Held Assets – Contributions</b>	Documents the level and type of contributions to any communally held assets.
<b>Communally Held Assets - Ownership</b>	Documents level and type of partial ownership in any communally held assets.
<b>Experience with Counseling Services</b>	Documents satisfaction with and outcomes of counseling services; anticipated future experiences; and understanding of financial topics.
<b>Family and Household Dynamics – Behaviors – Adults and Children</b>	Documents existence of a financial plan and how the household makes financial decisions together.
<b>Family and Household Dynamics – Behaviors – Adults No Children</b>	Documents existence of financial plan/goals and how the household manages the financial plan together.
<b>Family and Household Dynamics – Handling Finances</b>	Documents who the household financial decision maker is and level of satisfaction with the decisions.
<b>Family and Household Dynamics – Self-Assessment – Adults with Children</b>	Documents a self-assessment of the household’s ability to talk about financial matters and involve children in the decision making.
<b>Family and Household Dynamics – Self-Assessment – Adults with No Children</b>	Documents a self-assessment of the household’s ability to discuss financial matters.
<b>Financial Education – Part 1</b>	Documents financial training or education classes taken and any financial counseling received from the organization.
<b>Financial Education – Part 2</b>	Documents financial education training or counseling received elsewhere.
<b>Financial Support of Others</b>	Documents regular or occasional financial support for others.
<b>Household Composition</b>	Documents the size and characteristics of household and its members.
<b>Income and Expenses - Expenses</b>	Documents expenses for individual or household.
<b>Income and Expenses – Income</b>	Documents income for individual or household.
<b>Managing Debt – Other Loans</b>	Document how other types of loans are paid and how they are managed if payments cannot be made on time.
<b>Managing Debt – Residential Loans and Rent</b>	Documents how rent or residential loans are paid and they are managed if payments cannot be made on time.
<b>Managing Debt – Strategies</b>	Documents feelings about taking on debt and how it is managed.



<b>FINANCIAL EDUCATION AND CAPABILITY – ADULTS, page 3</b>	
<b>Managing Debt – Vehicle and Student Loans</b>	Documents how vehicle and student loans are paid and how managed if payments cannot be made on time.
<b>Net Worth – Assets</b>	Documents current assets for individuals or households.
<b>Net Worth – Liabilities</b>	Documents current liabilities for individuals or households.
<b>Predictability of Income and Expenses</b>	Documents the predictability of income and expenses from month to month.
<b>Response to Financial Change - Future</b>	Documents how a sudden change in future financial situation might be managed.
<b>Response to Financial Change - Past</b>	Documents how a significant change in financial situation has already been managed.
<b>Saving Behavior – Bank Accounts</b>	Documents the household experience, use, and deposits to checking and savings accounts.
<b>Saving Behavior – Bank Accounts – Interview</b>	Interview about the household experience, use, and deposits to checking and savings accounts.
<b>Saving Behavior – How Often and Where</b>	Documents schedule, amount and location of savings.
<b>Saving Behavior – Reasons</b>	Documents motivations and goals for saving.
<b>Sense of Well-Being</b>	Documents feelings about community and relationships.
<b>Social Networks and Informal Exchange – Connections</b>	Documents strength of personal and professional networks, and behaviors regarding money with those networks.
<b>Social Networks and Informal Exchange – Transactions</b>	Documents participation in informal, non-monetary exchanges of goods and services, such as bartering.
<b>Spending Behavior – Payment Methods</b>	Documents whether expenses are paid by credit, check, or other means.
<b>Spending Behavior – Shopping and Lending</b>	Documents shopping (coupons, sales) and lending behaviors.
<b>Spending Behavior – Tracking and Planning</b>	Documents how spending is planned and tracked.
<b>Status of Mortgage</b>	Documents home mortgage situation, payment history and actions taken in response to delinquency and/or financial counseling.
<b>Strategic Use of Formal Financial Resources – Accounts</b>	Documents use of formal financial resources such as checking/savings accounts and credit cards.
<b>Strategic Use of Formal Financial Resources – Alternatives</b>	Documents use of alternative financial services such as payday loans or rent-to-own facilities.
<b>Strategic Use of Formal Financial Resources – Investments</b>	Documents method and schedule for investments, and the reasons if investments are not used.
<b>Training and Educational Attainment – Children</b>	Documents participation in and plans for children’s education.
<b>Training and Educational Attainment – Status and Aspirations</b>	Documents experience and future goals for training and education.
<b>Wealth Creation Through Homeownership</b>	Worksheet to calculate home equity as a measure of wealth.

**FINANCIAL EDUCATION AND CAPABILITY  
MEASUREMENT TOOLS – YOUTH (Ages 14-24)**

<b>Tool Title</b>	<b>Description</b>
<b>Asset Cushion – Access to Resources (Youth)</b>	Documents access to and use of credit cards, debit cards, and pre-paid cards.
<b>Asset Cushion – Funds Set Aside by Others (Youth)</b>	Documents whether, and how much, there are financial assets being set aside by others for the respondent.
<b>Asset Cushion – Health Care (Youth)</b>	Documents access to and use of health care and health insurance.
<b>Asset Cushion (Youth)</b>	Documents use of cash, bank/savings accounts, and credit cards.
<b>Attitudes Toward Credit and Debt – Importance (Youth)</b>	Documents attitudes about taking on debt for personal expenses, having good credit, and paying back loans.
<b>Attitudes Toward Credit and Debt – Information (Youth)</b>	Documents source of information about credit and debt, knowledge about and satisfaction with personal credit score.
<b>Attitudes Toward Credit and Debt – Self Assessment (Youth)</b>	Documents feelings about credit and debt, avoiding debt, and confidence in paying bills on time.
<b>Attitudes Toward Financial Situation – Future (Youth)</b>	Documents attitudes and expectations for changing or improving financial future.
<b>Attitudes Toward Financial Situation - Security (Youth)</b>	Documents definition of and feelings about financial security.
<b>Attitudes Toward Owning Your Own Business (Youth)</b>	Documents attitudes of those who are entrepreneurs.
<b>Attitudes Toward Saving – Importance (Youth)</b>	Documents motivations or goals for saving, including lifecycle events.
<b>Attitudes Toward Saving – Information and Planning (Youth)</b>	Documents methods for obtaining information about saving and personal plans and timeframe for saving.
<b>Attitudes Toward Saving –Self-Assessment (Youth)</b>	Documents feelings about saving and personal ability to save.
<b>Attitudes Toward Spending – Importance (Youth)</b>	Documents key monthly expenses and personal prioritization of expenses.
<b>Attitudes Toward Spending – Self-Assessment (Youth)</b>	Documents satisfaction with spending behavior, and how to increase that satisfaction.
<b>Attitudes Toward Use of Financial Resources – Acceptability (Youth)</b>	Documents attitudes toward and knowledge about different types of financial services and vehicles.
<b>Attitudes Toward Use of Financial Resources – Importance (Youth)</b>	Documents attitudes about importance of certain financial investment activities and acceptability of different forms of payment.
<b>Building and Managing Credit – Credit Cards (Youth)</b>	Documents how credit cards are used and paid, and how late fees or inability to pay bills on time are managed.
<b>Building and Managing Credit – Credit Report and Score (Youth)</b>	Documents familiarity with credit score/report, frequency of checking it, and knowledge about how to improve it.
<b>Building and Managing Credit – Debit Cards (Youth)</b>	Documents how debit cards are used and why used instead of other methods of payment.
<b>Building and Managing Credit – Prepaid Cards (Youth)</b>	Documents how prepaid cards are used and why used instead of other payment methods.
<b>Civic Engagement and Political Participation (Youth)</b>	Documents involvement in community affairs, neighborhood activities, and nonprofit organizations.
<b>Educational Attainment and Training (Youth)</b>	Documents current levels and future goals and savings for education and training.
<b>Family and Household Dynamics – Behaviors (Youth)</b>	Documents whether there are financial plans/goals and how the household manages them together.

<b>FINANCIAL EDUCATION AND CAPABILITY – YOUTH, page 2</b>	
<b>Family and Household Dynamics – Handling Finances (Youth)</b>	Documents who the household financial decision maker is and level of satisfaction with the decisions.
<b>Family and Household Dynamics – Self-Assessment (Youth)</b>	Documents how well the household is able to talk about financial matters.
<b>Financial Education - Part 1 (Youth)</b>	Documents financial training or education classes taken and any financial counseling received from the organization
<b>Financial Education - Part 2 (Youth)</b>	Documents financial education training or counseling received elsewhere.
<b>Household Composition (Youth)</b>	Documents composition of household and characteristics of household members.
<b>Income and Expenses – Income (Youth)</b>	Documents income for individual or household respondents.
<b>Income and Expenses – Expenses (Youth)</b>	Documents expenses for individual or household respondents.
<b>Managing Debt – Other Loans (Youth)</b>	Documents having other debt, how other types of loans are paid, and what is done if payment cannot be made on time.
<b>Managing Debt – Rent, Utilities and Food (Youth)</b>	Documents how rent, utility, and food costs are paid and what is done if payment cannot be made on time.
<b>Managing Debt – Vehicle and Student Loans (Youth)</b>	Documents how vehicle and student loans are paid and what is done if payment cannot be made on time.
<b>Peer-Friend Dynamics – Current (Youth)</b>	Documents frequency and content of talks with friends about money, and the financial behavior of closest friends
<b>Peer-Friend Dynamics – Prospective (Youth)</b>	Documents attitudes about social spending on a limited budget and anticipated reactions in various scenarios.
<b>Peer-Friend Dynamics – Prospective (Youth)</b>	Documents attitudes about social spending on a limited budget and anticipated reactions in various scenarios.
<b>Predictability of Income and Expenses (Youth)</b>	Documents the predictability of income and expenses from month to month.
<b>Response to Financial Change (Youth)</b>	Documents past or anticipated future response to a significant change in financial situation.
<b>Saving Behavior – Bank Accounts (Youth)</b>	Documents use of checking and savings accounts and how funds are deposited.
<b>Saving Behavior – How Often and Where (Youth)</b>	Documents schedule and location of savings and whether someone else is contributing to the savings.
<b>Saving Behavior—Reasons (Youth)</b>	Documents the motivations and reasons for saving practices.
<b>Sense of Well-Being (Youth)</b>	Documents perceptions of community, activities, and friendships.
<b>Social Networks and Informal Exchange – Connections (Youth)</b>	Documents strength of personal networks, and behaviors regarding money with those networks including borrowing or lending.
<b>Social Networks and Informal Exchange – Transactions (Youth)</b>	Documents participation in informal, non-monetary exchanges of goods and services, such as bartering.
<b>Spending Behavior – Payment Methods (Youth)</b>	Documents whether expenses are paid by cash, credit, check, or another means.
<b>Spending Behavior – Shopping and Lending (Youth)</b>	Documents shopping behaviors sales, comparison shopping, coupons and whether funds are loaned to others.
<b>Spending Behavior – Tracking and Planning (Youth)</b>	Documents how spending is tracked and planned.
<b>Strategic Use of Formal Financial Resources - Accounts (Youth)</b>	Documents use of formal financial resources such as checking/savings accounts and credit cards.
<b>Strategic Use of Formal Financial Resources – Alternatives (Youth)</b>	Documents use of alternative financial services such as payday loans or rent-to-own facilities.

**GREEN MEASUREMENT TOOLS  
HOMES AND COMMUNITIES**

The Success Measures Green Homes and Communities Tools assess resident renter and homeowner attitudes and behaviors related to environmentally sustainable development practices; interest levels in adopting energy saving and sustainable household management practices are also measured. Energy and water usage savings, achieved through green building renovation and resident education, are captured for single and multifamily properties.

<b>Tool Title</b>	<b>Description</b>
<b>Community Green Interest – Basic Set</b>	Documents basic environmental issues in order to add specific topic modules.
<b>Modules</b> <ul style="list-style-type: none"> <li>➤ <i>Energy Use</i></li> <li>➤ <i>Environmental Clean-up and Beautification</i></li> <li>➤ <i>Environmental Pollution</i></li> <li>➤ <i>Environmentally Friendly Transportation</i></li> <li>➤ <i>Green Space</i></li> <li>➤ <i>Local Food Production</i></li> <li>➤ <i>Organizational Effectiveness</i></li> <li>➤ <i>Specific Environmental Issues</i></li> </ul>	
<b>Community Green Interest – Full Set</b>	Documents full set of environmental issues questions, including basic set and all specific topic modules.
<b>Community Green Interest – Focus Group</b>	Provides discussion format and questions to explore most important green issues of interest t to a particular community and responsiveness of organization to these issues.
<b>Homeowner Attitudes: Green Features</b>	Documents a homeowner's interest in the home's green environmental features pre- and post- purchase.
<b>Homeowner Behavior: Core Green Features</b>	Documents core environmental features such as recycling, energy use and water use.
<b>Homeowner Behavior: Exterior Specialized Green Features –Basic Set</b>	Documents basic exterior green features in order to add specific topic modules.
<b>Modules</b> <ul style="list-style-type: none"> <li>➤ <i>Energy-Efficient Lighting</i></li> <li>➤ <i>General Questions</i></li> <li>➤ <i>Green Decks and Porches</i></li> <li>➤ <i>Green Shingles and Roofing</i></li> <li>➤ <i>Native Landscaping</i></li> <li>➤ <i>Rain Barrels</i></li> <li>➤ <i>Siding</i></li> <li>➤ <i>Solar Panels</i></li> </ul>	

<b>GREEN HOMES AND COMMUNITIES, page 2</b>	
<b>Homeowner Behavior: Interior Specialized Green Features – Basic Set</b> <hr/> <b>Modules</b> <ul style="list-style-type: none"> <li>➤ <i>Energy-Efficient Appliances</i></li> <li>➤ <i>Energy-Efficient Lighting</i></li> <li>➤ <i>Floor Finishes</i></li> <li>➤ <i>General Questions</i></li> <li>➤ <i>Heating and Cooling</i></li> <li>➤ <i>Low VOC Paint</i></li> <li>➤ <i>Recycling Systems</i></li> <li>➤ <i>Water-Conservation Devices</i></li> </ul>	Documents basic interior green features in order to add specific topic modules.
<b>Multifamily Energy Use and Savings</b>	Worksheet to calculate multifamily energy use and savings
<b>Multifamily Water Use and Savings</b>	Worksheet to calculate multifamily water use and savings.
<b>Single Family Energy Use and Savings</b>	Documents resident’s energy cost compared to prior housing and interest in reducing energy use and provides worksheet to calculate energy use savings over time.
<b>Single Family Water Use and Savings</b>	Worksheet to calculate single family water use and savings
<b>Single Family Water Use and Savings</b>	Worksheet to calculate single family water use and savings.
<b>Tenant Attitudes: Green Features</b>	Documents a resident tenant’s attitudes about environmental features in the rental property. .
<b>Tenant Behavior: Core Green Features</b>	Documents core environmental features in rental unit, such as recycling, energy usage and water usage
<b>Tenant Behavior: Interior Specialized Green Features –Basic Set</b> <hr/> <b>Modules</b> <ul style="list-style-type: none"> <li>➤ <i>Appliances</i></li> <li>➤ <i>Energy-efficient interior lighting</i></li> <li>➤ <i>General questions</i></li> <li>➤ <i>Heating and Cooling</i></li> <li>➤ <i>Problems or Concerns</i></li> <li>➤ <i>Recycling Systems</i></li> <li>➤ <i>Floor Finishes</i></li> <li>➤ <i>Volatile Organic Compounds</i></li> <li>➤ <i>Water-Conservation Devices</i></li> </ul>	Documents basic rental unit interior green features in order to add specific topic modules.

**GREEN MEASUREMENT TOOLS  
ORGANIZATIONS**

<b>Tool Title</b>	<b>Description</b>
<b>Green Organization Benefits: Employees</b>	Documents organization's assessment of impact of green practices on employees' attitudes and behaviors and the benefits to the organization.
<b>Green Organization Benefits: External Recognition</b>	Documents organization's assessment of external stakeholders' perceptions, benefits, or challenges regarding organization due to green practices.
<b>Green Organization Benefits: Funding</b>	Documents organization's assessment of the benefits and challenges of fundraising or fee-for-service efforts as impacted by organization's implementation of green components.
<b>Green Organization Benefits: Residents and Participants</b>	Documents organization's assessment of impact of their green practices on the attitudes and behaviors of people they serve and on community building efforts.
<b>Green Organization: Employee Questionnaire</b>	Documents employee assessment of internal organizational green practices and of green programs offered to community.
<b>Green Organization: External Stakeholders Questionnaire</b>	Documents external stakeholder assessment of organization's green practices and activities.
<b>Green Organization: Participant Questionnaire</b>	Documents program participant assessment of organization's green programs and services offered.
<b>Green Organization: Resident Questionnaire</b>	Documents resident assessment of organization's green practices and green features of organization's housing.
<b>Green Works and Practices of the Organization</b>	Documents why and how certain green practices and programs were implemented at organization and other green affiliations and involvement.



## HEALTH MEASUREMENT TOOLS

The Success Measures Health Tools evaluate the health-related outcomes of a wide range of affordable housing, neighborhood revitalization, workforce development, supportive service, community engagement and related community benefit programs. Included are tools for collecting both primary and secondary health-related data on individual health status, attitudes, behaviors and influences, as well as community environmental factors, demographics, and social factors.

Tool Title	Description
<b>INDIVIDUAL AND COMMUNITY HEALTH STATUS</b>	
<b>Individual Health Status</b>	
Medical Conditions	Individual's self-reports about their health history, long-term health conditions, and acute health events. (Survey)
Disease Management	Individual's self-reports about how they are managing specific chronic diseases, receiving care, and controlling adverse health episodes. (Survey)
Overall Health	Individual's self-reports about their overall health, emotional well-being, and physical condition including height and weight. (Survey)
Health Metrics	Records objective measurements of the health of individuals that result from a specific medical test, such as blood pressure, cholesterol, or hemoglobin. (Tracking secondary data)
<b>Community Health Status</b>	
Community Morbidity	Records the incidence of specific infectious diseases in a neighborhood or geographic area. (Tracking secondary data)
Community Mortality	Records the death rates due to specific causes in a neighborhood or geographic area. (Tracking secondary data)
Medical Visit Metrics	Records the number of hospital admissions, emergency room treat-and-release visits, and health clinic visits for specific medical conditions. (Tracking secondary data)
<b>INDIVIDUAL HEALTH BELIEFS AND ATTITUDES</b>	
<b>Attitudes and Discussions About Health</b>	
Views on Health	Individual's self-reports about influences on their health, their willingness to discuss health topics, and the similarity of their attitudes to family and friends. (Survey)
Health Discussions with Household Members	Individual's self-reports about the importance and frequency of other household members' discussions on specific health topics. (Survey)
Health Discussions with Friends	Individual's self-reports about the frequency of talking with close friends about specific health topics, including eating habits, mental health, and death. (Survey)
<b>Views on a Healthy Lifestyle</b>	
Views on Eating	Individual's self-reports about their attitudes toward healthy foods and balanced meals. (Survey)
Views on Physical Activity	Individual's self-reports about their attitudes toward being physically active. (Survey)
Views on Alcohol, Tobacco, and Drug Use	Individual's self-reports about their beliefs and attitudes toward secondhand smoke, alcohol, tobacco and marijuana, and prescription drugs. (Survey)
Views on Relaxation and Stress Management	Individual's self-reports about their views on stress and the effectiveness of specific stress-reducing activities, (Survey)

<b>INDIVIDUAL HEALTH BEHAVIORS</b>		<b>HEALTH, page 2</b>
<b>Health Knowledge and Use of Health Care</b>		
Health Care Knowledge	Individual's self-reports about their sources for health-related advice, their level of trust in specific sources, and their confidence participating in their own health care. (Survey)	
Use of Health Care Services	Individual's self-reports about their use of or inability to use different health-care settings and providers, including alternative and complementary care, (Survey)	
Health Insurance	Individual's self-reports about having or not having private or public health insurance coverage for themselves or their children and the impact on their health. (Survey)	
<b>Participation in a Healthy Lifestyle</b>		
Eating Behavior	Individual's self-reports about past and present eating habits related to fruits and vegetables, cooking meals at home, community gardens, packaged foods, and the potential for changing habits. (Survey)	
Physical Activity Behavior	Individual's self-reports about their level of physical or recreational activities and exercise, including barriers to these activities. (Survey)	
Alcohol, Tobacco and Drug Use Behavior	Individual's self-reports about consuming alcohol, smoking tobacco, and using prescription drugs in a way not directed by a doctor. (Survey)	
Relaxation and Stress Management Behavior	Individual's self-reports about what specific activities they do to reduce stress or take time for themselves. (Survey)	
<b>Care Giving and Receiving</b>		
Caring for Others	Individual's self-reports about providing care for someone with long-term illness, disability, or advanced age. (Survey)	
Receiving Care from Others	Individual's self-reports about receiving help from others with errands, household chores, or personal care. (Survey)	
<b>INDIVIDUAL FACTORS AND INFLUENCES RELATED TO HEALTH</b>		
<b>Individual Factors</b>		
Individual Demographics - Health	Individual's self-reports about personal or household characteristics, including age, gender, race, ethnicity, first language, and sexual orientation. (Survey)	
Housing Costs	Individual's self-reports about renting or owning their home, satisfaction with available housing, and ability to meet housing and utility expenses. (Survey)	
Financial Stability	Individual's self-reports about their financial situation, financial security and access to banks and credit. (Survey)	
Food Security	Individual's self-reports about having enough to eat, ability to afford balanced meals, and using food stamps or food pantries. (Survey)	
Functional Status	Individual's self-reports about how physical or mental health issues might limit their ability to carry out daily personal, household or social activities. (Survey)	
Interest in Education and Training	Individual's self-reports about recent educational or training classes they have attended and their interest in or barriers to furthering their education.	
Employment and Workforce Development	Individual's self-reports about their current or past employment status and their interest in or barriers to job training, workforce education, or finding a job. (Survey)	
Personal Traits	Individual's self-reports about their own feelings of self-confidence, level of curiosity, and responses to change. (Survey)	
Social Support and Safety	Individual's self-reports about their social networks and feelings of safety in their home and community. (Survey)	
Housing Stability	Individual's self-reports about the length of time they have lived in the community and in their current home, the number of times they have moved, and whether they rent or own their home. (Survey)	

<b>HEALTH, page 3</b>	
<b>Use of Community Services and Amenities</b>	
Use of Amenities	Individual's self-reports about using or barriers to using amenities near home, including retail, financial, classes, and community infrastructure or transportation. (Survey)
Use of Community Services	Individual's self-reports about using or barriers to using community services, such as financial assistance, job or business training, social services, and schools. (Survey)
<b>Social and Cultural Contexts</b>	
Social Connections	Individual's self-reports about personal connections and proximity to friends and families, satisfaction with the amount of time spent with them, and feelings of comfort with other people. (Survey)
Cultural Context	Individual's self-reports about how their religion, faith, or belief system impact their health care experience, where they seek health care services and their interaction with health care professionals. (Survey)
<b>Influences on Individual</b>	
Influences on Individual's Views on Health	Individual's self-reports about how close friends or household members influence their own feelings about health and health topics, where they get trusted health information, and where they seek medical care. (Survey)
Influences on Individual's Eating	Individual's self-reports about the influence on their own eating habits by household members and close friends. (Survey)
Influences on Individual's Physical Activity	Individual's self-reports about the influence on their own physical activity by household members or close friends. (Survey)
Influences on Individual's Alcohol and Tobacco Use	Individual's self-reports about their own acceptance of smoking and drinking, and the status of the smoking and drinking habits of household members. (Survey)
<b>COMMUNITY ENVIRONMENTAL FACTORS RELATED TO HEALTH</b>	
<b>Housing Conditions</b>	
Interior of Residence: Resident Perception	Individual's self-reports about the features and condition of their single or multifamily residence including safety, comfort, electrical systems, and eco-friendly features. (Survey)
Interior of Residence: Expert Assessment	Building expert's assessment of the condition of owned or rented residential units, including infrastructure, electrical and HVAC systems, hazards, and childproofing. (Expert Assessment)
Exterior of Residence: Resident Perception	Individual's self-reports about the upkeep and condition of their residence's exterior (single-family house or multifamily building), including yard, paint, lighting, fencing, fire escapes, and eco-friendly features. (Survey)
Residential Building Exterior and Site: Expert Assessment	Building expert's assessment of exterior elements of residential buildings, including structural and site hazards, drainage problems, ground erosion; appropriate safety features, and access for the disabled. (Expert Assessment)
Multifamily Common Areas: Resident Perception	Individual's self-reports about the upkeep and condition of the common areas of their multifamily building, such as lobbies, halls, ceilings and floors, exit signs, walkways and steps, smoking areas and litter. (Survey)
Multifamily Common Areas and Building Systems: Expert Assessment	Building expert's assessment of common areas, mechanical systems, exit signage, trash collection, smoke detectors, peeling paint, and elevators. (Expert Assessment)
Housing in the Community	Records observations at the parcel level of residential building conditions, such as roof, gutters, foundation, fence, driveway, attractiveness, maintenance and security. (Observation)
<b>Land Use and Physical Features</b>	
Design and Management: Key Informant Interview	Describes land use patterns and environmental characteristics, such as walkability, green space, resident interaction and safety, pollution, and storm and waste water. (Interview)

<b>HEALTH, page 4</b>	
Environmental Metrics	Records the quality of the environment, including air, soil, and water, in a neighborhood or other geographic area. (Tracking secondary data)
Land Use and Maintenance	Records observations at block level of land use and maintenance, condition of structures, vacant properties, public infrastructure, barriers, safety, and cleanliness. (Observation)
Traffic and Pedestrian Safety	Records observations of vehicular and pedestrian flow at the block level, such as traffic signals, speed bumps, parking rules, bicycle lanes, sidewalks; accessibility ramps, and crosswalks. (Observation)
<b>Community Services and Amenities</b>	
Availability and Quality of Amenities: Key Informant Interview	Records availability and quality of recreational, transit, retail, social and wellness facilities in the community. (Interview)
Accessibility and Perception of Amenities	Individual's self-reports about the quality, accessibility, and welcoming environment at recreation, transit, libraries, wellness and community programs and facilities near where they live. (Survey)
Services and Trainings in the Community: Available Data	Records the availability and quality of workforce trainings, financial services; and social services.(Tracking secondary data)
Services and Trainings in the Community: Key Informant Perception	Describes the availability and quality of trainings and financial and social services. (Interview)
Services and Trainings in the Community: Resident Perception	Individual's self-reports on ease and comfort level when accessing banking, job training, or child care services in the community. (Survey)
<b>COMMUNITY DEMOGRAPHICS AND SOCIAL FACTORS RELATED TO HEALTH</b>	
<b>Population Characteristics</b>	
Community Demographics - Health	Records the demographic composition of the community on health-related factors, including race, age, ethnicity, income, employment, and educational attainment. (Tracking secondary data)
<b>Social Factors</b>	
Community Social Cohesion	Individual's self-reports about their community's social connections, neighborly support, common values and willingness to participate. (Survey)
<b>AVAILABILITY, QUALITY, AND CULTURAL SENSITIVITY OF HEALTH CARE SERVICES</b>	
<b>Availability and Quality of Health Care</b>	
Availability of Hospital and Health Care Services	Records availability and quality of hospitals, clinics, medical and dental services, and pharmacies. (Tracking secondary data.)
Availability and Practices of Primary Care Services: Key Informant Interview	Describes the cultural sensitivity, responsiveness, coordination of care and challenges of available health care services. (Interview)
Features and Barriers in Health Care System: Key Informant Interview	Describes the systemic factors that promote or limit access to health care; integration of different types of health care and the availability of health care insurance. (Interview)
<b>Cultural Sensitivity and Interaction with Health Care Providers</b>	
Accessibility of Health Care Services	Individual's self-reports on the accessibility, convenience, and quality of services for themselves and their children at their most frequently used health care facility. (Survey)
Cultural Sensitivity of Health Care Practices	Individual's self-reports on the welcoming environment, cultural sensitivity, and accommodation to preferred language of their most frequently used health care facility. (Survey)
Interaction with Health Care Providers	Individual's self-reports about the comfort and quality of their interaction with a health care professional when getting a medical opinion. (Survey)
<b>COLLABORATIONS &amp; PARTNERSHIPS</b>	
Satisfaction with Collaborative Partnerships	Member's self-reports on their levels of satisfaction with the capacity, commitment, leadership, communication and benefits of collaborative. (Survey)

## HOUSING MEASUREMENT TOOLS

The Success Measures Housing Tools look at the experience of resident renters or homeowners, in both multifamily and single family housing. The tools capture feedback on the benefits of living in safe, affordable, quality housing, as well as the local economic impact of construction and rehabilitation. Physical conditions of properties, as well as overall enhanced community features such as safety and availability services are addressed.

Tool Title	Description
Attitudes Towards Homeownership	Documents attitudes about homeownership.
Average Community Property Values from Published Sources	Worksheet to track published property value records and calculate change percentages.
Duration of Residence and Resident Stability	Documents the length of time and reasons why people have lived in a neighborhood, community or housing unit.
Duration of Residence and Resident Stability - Census Data	Worksheet to track Census data on the length of time people have lived in current housing unit.
Economic Impact of Homeownership New Construction and Rehabilitation	Worksheet to estimate the local economic impact of homeownership construction or rehabilitation.
Economic Impact of Multifamily Rental Housing New Construction and Rehabilitation	Worksheet to estimate the local economic impact of multifamily rental housing construction or rehabilitation projects.
Homeowner Attitudes Toward Green Home	Documents a homeowner's interest in the home's environmental features pre- and post- purchase.
Homeowner Behavior – Core Green Features	Documents core environmental features such as recycling, energy use and water use.
Homeowner Behavior: Exterior Specialized Green Features - Basic Set	Documents basic exterior green features in order to add specific topic modules.
<i>Modules available for add-on.</i> <ul style="list-style-type: none"> <li>➤ <i>Energy-Efficient Lighting</i></li> <li>➤ <i>General Questions</i></li> <li>➤ <i>Green Decks and Porches</i></li> <li>➤ <i>Green Shingles and Roofing</i></li> <li>➤ <i>Native Landscaping</i></li> <li>➤ <i>Rain Barrels</i></li> <li>➤ <i>Siding</i></li> <li>➤ <i>Solar Panels</i></li> </ul>	
Homeowner Behavior: Exterior Specialized Green Features – Full Set	Documents full set of specialized exterior environmental features, including basic set and all topic modules.
Homeowner Behavior: Interior Specialized Green Features – Basic Set	Documents basic interior green features in order to add specific topic modules.
<i>Modules available for add-on.</i> <ul style="list-style-type: none"> <li>➤ <i>Energy-Efficient Appliances</i></li> <li>➤ <i>Energy-Efficient Lighting</i></li> <li>➤ <i>Floor Finishes</i></li> <li>➤ <i>General Questions</i></li> <li>➤ <i>Heating and Cooling</i></li> <li>➤ <i>Low VOC Paint</i></li> <li>➤ <i>Recycling Systems</i></li> <li>➤ <i>Water-Conservation Devices</i></li> </ul>	
Homeowner Behavior: Interior Specialized Green Features – Full Set	Documents full set of specialized interior environmental features, including basic set and all topic modules.
Individual Property Values	Worksheet to record changes in individual property values.



<b>Monthly Housing Costs and Affordability – Owner-Occupied</b>	Worksheet to calculate monthly homeownership costs and income and make affordability comparisons.
<b>HOUSING, page 2</b>	
<b>Monthly Housing Costs and Affordability – Owner-Occupied</b>	Worksheet to calculate monthly homeownership costs and income and make affordability comparisons.
<b>Monthly Housing Costs and Affordability – Renter-Occupied</b>	Worksheet for residents or program staff to calculate monthly rental housing costs and income, and make affordability comparisons.
<b>Perception of Neighborhood - Housing Quality</b>	Documents perceptions of condition and appearance of housing quality.
<b>Personal Effectiveness and Stability</b>	Documents how access to affordable housing affects a resident’s personal identity, expectations, and behavior.
<b>Property Maintenance and Management</b>	Documents responsiveness of management and the condition and repair of units.
<b>Property Maintenance and Management – Short Version</b>	Documents responsiveness of management and the condition and repair of units. (Short version.)
<b>Renter Interest In Purchasing a Home - Module</b>	Documents level of interest and reasons
<b>Residential Property</b>	Documents physical conditions of residential property at the parcel level
<b>Residential Property – Vacant Property Only</b>	Documents conditions of vacant residential properties at parcel level.
<b>Status of Mortgage</b>	Documents home mortgage status and management, including payment, delinquency, and financial counseling history.
<b>Visual Assessment of Housing Quality – Exterior and Interior</b>	Documents visual assessment of exterior and interior housing conditions. .
<b>Visual Assessment of Housing Quality – Exterior and Interior</b>	Documents visual assessment of exterior and interior housing conditions.
<b>Visual Assessment of Housing Quality – Short Version, Exterior</b>	Documents visual assessment of only the exterior components of housing conditions.
<b>Visual Assessment of Housing Quality – Short Version, Exterior only</b>	Documents visual assessment of exterior housing conditions only.
<b>Wealth Creation Through Homeownership</b>	Worksheet to calculate home equity as a measure of wealth.



**RESIDENT SERVICES  
MEASUREMENT TOOLS**

The Success Measures Resident Services Tools document feedback from residents who participate in a range of programs including health, recreation, education, job training, financial capability, and youth after-school initiatives. The tools measure the outcomes of these programs and may also track participation.

Tool Title	Description
Apartment Community Facilities	Documents satisfaction, use, and value of facilities in apartment community.
Apartment Community Facilities and Programs	Documents satisfaction, use, and change observed or expected in apartment community's facilities and programs.
Apartment Community Programs - Basic Set	Documents basic assessment regarding apartment community programs in order to add specific topic modules.
<b>Modules</b> <ul style="list-style-type: none"> <li>➤ Apartment Community Program Template</li> <li>➤ Apartment Community Programs: Activities for Seniors</li> <li>➤ Apartment Community Programs: Breakfast Program for Children</li> <li>➤ Energy Efficiency: Recycling</li> </ul>	
Apartment Community Programs - Full Set	Documents full set of information and assessments regarding apartment community programs.
Early Learning Program Participant Form	Tracks identifying information and assessment details of child enrolled in early learning program.
Financial Capability Survey	Documents issues relating to household composition, income, credit and debt, and savings.
High School Student Program Participant Form	Tracks identifying information, assessment, indicator, and event details of high school student participant.
Housing Stability Tracker	Tracks details related to housing transitions.
Job Training Program Graduate Survey	Documents satisfaction with job training program and general information about current employment.
Job Training Program Participant Form	Tracks job training program participant information and details of post-program employment.
K-8 Student Program Participant Form	Tracks identifying information, assessment, indicator, and event details of K-8 student program participant.
Personal Effectiveness and Stability	Tracks how access to affordable housing affects a resident's personal identity, expectations and behavior, and ability to function in situations of daily living.
Property Maintenance and Management - Short Version	Documents responsiveness of management and the condition and repair of units. (Short version.)

<b>RESIDENT SERVICES, page 2</b>	
<b>Quality of Life</b>	Documents feelings about appearance, services, and safety in community.
<b>Quality of Life: Tenants</b>	Documents satisfaction level, neighbor interaction, maintenance, and safety issues in apartment community and neighborhood, with specific topic modules to add.
<p><i>Modules</i></p> <ul style="list-style-type: none"> <li>➤ <i>Apartment Community and Neighborhood Change</i></li> <li>➤ <i>Water and Energy Use</i></li> </ul>	
<b>Resident Leadership Development Tool</b>	Documents identifying and household information, as well as participant's assessment of leadership history, skills, and accomplishments.
<b>Senior Program Participant Form</b>	Tracks identifying information and involvement in activities by senior program participant.
<b>Sense of Community</b>	Documents the extent to which respondents know and communicate with their neighbors and participate in community activities.
<b>Sense of Community – Short Version</b>	Documents the core information regarding the extent to which respondents know and communicate with their neighbors and participate in community activities. ( <i>Short version.</i> )
<b>Sense of Well-Being</b>	Documents feelings about community and relationships.

## ROLE OF INTERMEDIARIES MEASUREMENT TOOLS

The Success Measures Role of Intermediaries Tools evaluate the outcomes of services provided by community development intermediaries, including technical assistance, training, lending, field-building initiatives, policy, and advocacy. This group of tools is specifically designed for local, regional, and national intermediaries and related organizations such as loan funds, credit unions, or others directly providing financial or technical services to organizations.

Intermediary Self-Assessment Tools	Description
<b>Development and Dissemination of New Solutions</b>	Documents assessment of intermediary's contributions to community development field through new or existing products, services, or solutions.
<b>Expansion of Services</b>	Documents an intermediary's increase in services related to existing geography, populations, and language offerings.
<b>Expansion of Services to New Areas</b>	Documents an intermediary's expansion of services, products, or methods of delivery to new geographies or populations.
<b>Funding for Community Development</b>	Documents intermediary's role in expanding support for the community development field by generating or leveraging funding.
<b>Innovative Alliances Within the Field</b>	Documents intermediary's engagement in new partnerships and collaborations to strengthen the community development field.
<b>Intermediary Governance</b>	Documents assessment of intermediary's governing body including skills, diversity, engagement, activities, and succession planning.
<b>New Products and Services</b>	Documents intermediary's consideration and development of new financial, training, or TA products and services.
<b>Operational Efficiency of an Intermediary</b>	Documents efficiency of operations within an intermediary organization.
<b>Organizational Culture</b>	Documents key components of organizational culture, such as adaptive capacities, collaboration, values, and leadership's entrepreneurial spirit.
<b>Policy Capacity</b>	Documents an intermediary's involvement in policy work.
<b>Policy Impact</b>	Documents an intermediary's local, state and national policy impacts and education efforts for the general public and policymakers.
<b>Program Management and Delivery</b>	Documents organization's capacity to manage, expand, and fund its projects, programs, and services.
<b>Recognition by Others</b>	Documents how intermediary's work has been recognized by media and other organizations.
<b>Strategic Alliances Outside the Field</b>	Documents an intermediary's use of strategic alliances with those outside the community development field.
<b>Strategy and Planning</b>	Documents an organization's strategic decision making, planning, and relationship building.
<b>Strength of Internal Plans and Systems</b>	Documents role and strength of organization's key plans, systems, and activities, both internal and external.
<b>Transfer of Information, Knowledge, and Skills</b>	Documents an intermediary's enhancement and strengthening of the community development field by sharing knowledge and best practices.

ROLE OF INTERMEDIARIES, page 2	
Assessment of Intermediary by Organization Served Tools	Description
Development and Dissemination of New Solutions	Documents assessment of intermediary's contributions to community development field through new or existing products, services, or solutions.
Impact of Intermediary's Funding and Financing	Documents organization's assessment of intermediary funding, financing, and resulting impacts.
Impact of Intermediary's Technical Assistance	Documents organization's assessment of intermediary's technical assistance and the resulting impacts.
Impact of Intermediary's Training	Documents organization's assessment of intermediary's training and the resulting impacts.
Satisfaction with Intermediary Services	Documents levels of satisfaction with types of services organization received from intermediary.

Tools are available through subscription to the Success Measures Data System.  
 For further information, consult our website or contact us directly:

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*Success Measures, operating as a social enterprise at NeighborWorks America, is a community development evaluation group offering evaluation planning and consulting services, technical assistance, 350 measurement tools, and technology.*