Capacity-building for small and mid-sized housing and shelter providers:

Needs, priorities, and recommendations

September, 2023

Project partners:

City of Bellingham
Planning & Community Development

Whatcom Community Foundation

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Executive Summary

The City of Bellingham (COB) and Whatcom Community Foundation (WCF) (the project partners) recognize that recent years have brought tremendous strain to organizations and staff providing housing and shelter services in Bellingham, and simply maintaining existing capabilities has been a challenge for many. At the same time, the need for shelter and services has grown. Capacity support is clearly a need.

The COB has committed $200,000 from general funds to a capacity-building initiative, focused on supporting organizations that are getting ready to or are in the process of expanding capacity, including expanding the capacity of new staff to maintain and strengthen existing housing programs. As a precursor to developing a capacity-building program, the project partners teamed up to assess the capacity-building needs of small-to-mid-sized nonprofit organizations working in this sector, to better understand the key operational challenges that organizations are facing, and to gather input on what kinds of supports would help to sustain and/or expand their capacity to deliver housing and shelter services.

The insights gained from this interview/survey process will be used by the project partners to:

- Enhance organizational resources and supports
- Share information about needs and priorities with other funders
- Educate policy makers about the issues that participant organizations are working to address and the kinds of challenges that they are facing

Process

Nine small-to-mid-sized organizations were identified by the project partners, and lead staff from each organization were invited to participate (See Appendices A and B). To encourage the free flow of information and ideas, a third party was hired to conduct the interviews and to collect and interpret the survey data. Interview questions were circulated to participants in advance (see Appendix C), with the request that participants gather input from their teams in advance of the interviews. Hour-long interviews were conducted in June, 2023.

A confidential follow-up survey—including ideas generated during the interviews—was conducted in July, 2023. There were both open-ended questions, and quantitative questions (rankings or ratings on a 5-point scale). Some of the survey questions included participant suggestions from the interviews. While some of these suggestions may not be actionable within the current regulatory environment, and some of them may not fit within a government-funded capacity-building initiative, they were included in an effort to inform longer-term conversations among policymakers as well as public and private funders in the region.

Context

The organizations interviewed in this project are working during a time of multiple, complex, sustained pressures. Interviews and survey responses echoed these trends, and the challenges they present:

- **Increases in homelessness and housing instability.** According to the *2023 Point in Time Count Report*[1], there was a roughly 27% increase in homelessness from 2022 to 2023, including among seniors, families with children, veterans, and people with illnesses or disabilities.
- **Low housing inventory and rapidly rising housing costs**. The cost of rent in Bellingham has increased 22% since 2020. The median rental price for a one-bedroom unit has ranged from a low of $900 in August 2018 to a high of $1,483 in April 2023[2].
- **Stabilization assistance that was available during the pandemic has ended.**

How these trends are playing out for participating organizations:

- **Significant increases in waiting lists for housing:** As one organization put it, "Our waiting list is four times longer than it was before COVID".
- **Overtaxed emergency resources related to lack of other housing options**: People end up lingering in crisis shelters or hotels because there isn't enough transitional, supportive, or affordable long-term housing. As one organization put it, "We're doing a lot more rapid rehousing, but that relies on units that don't exist, and clients are staying in hotels way longer because there's no place for them to go – this isn't a great solution at scale."
- **An increase in the complexity of needs among the people they serve:** Several organizations report an increase in mental health challenges, substance use (including new types of street drugs), dual diagnosis (substance use and mental health challenges), and medical fragility.
- **Financial stress:** Inflation and higher costs of living mean that grant funding, contract dollars, and housing vouchers don't go as far as they used to.
- **Declining availability of volunteers.** One organization lost 80% of its volunteers because of the social-distancing requirements and other challenges of the pandemic.

> Needs are increasing, not just in volume but in type – our population is more medically fragile than ever, mental health challenges and needs are skyrocketing, not just among unsheltered folks but among working individuals in this society. And if *we're* stressed and tense, folks who are actively living in a state of survival and trauma, are 100 times more stressed and vulnerable, and we're not addressing that on a large scale.
>
> ~ Executive Director, shelter organization

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[1] 2023 Point in Time Count Report, reports that there was a roughly 27% increase in people counted, from 832 people counted in 2022 to 1,059 counted in 2023. https://www.whatcomcounty.us/DocumentCenter/View/75702/2023-PIT-Count-Report?bidId=

[2] According to Zumper.com monthly Seattle metro report, cited here: https://www.bellinghamherald.com/news/local/article275466481.html.

Summary of key findings:

- Eight of the nine participating organizations are planning to or are in the process of expanding their capacity.

- The top five priorities for capacity-building investments among the participating organizations are the following:

    o Investments in staff compensation and staff wellness

    o Investments to expand capacity through new staff positions

    o Investments in technology (ie, computers, software subscriptions)

    o Investments in operations and admin (policies/procedures, HR or financial systems, etc.)

    o Staff training and professional development

- It's worth noting that most organizations have an expansive definition of what is required for capacity-building. This may be related to the multiple stressors that organizations have been navigating in recent years. Some organizations voiced both tremendous commitment AND the observation that their organizations were stretched very thin, and workload is not sustainable at current staffing levels. Their focus is very much on both *maintaining* current capacity (sometimes called stabilization by funders and policy makers) as well as *expanding* capacity. There is widespread recognition among participants that a stable foundation is necessary for them to successfully expand their capacity.

- In addition, while most of the organizations are focused on some form of expansion to meet increased demand and more complex needs, their definition of expanding capacity is not limited to more beds, facilities, or housing. It includes supportive services, a holistic approach to care, and investing in staffing in terms of things like compensation, employee wellness plans, training and professional development, sustainable caseloads, four-day workweeks, and other staff-friendly policies.

Recommendations:

In formulating recommendations within the context of finite resources (the pilot phase of the COB's capacity-building initiative with a known commitment of $200,000), preference was given to recommendations that would meet tangible needs and priorities, are cost-effective, and—where possible—would meet multiple goals.

The set of recommendations included at the end of this report focuses on technical assistance opportunities and priorities, community-based training and professional development opportunities, and small-to-midsized direct grants (estimating a range of $5,000 to $35,000).

A set of considerations for larger-scale, longer-term investments in capacity is also included.

Strengths and challenges: high-level themes

In addition to the challenges that organizations are facing (as described in prior sections), several other themes emerged. While each organization has its own unique mission and approach, several themes were shared by multiple organizations:

- **Staffing challenges[3] and strengths:** Several organizations discussed the challenges of hiring and retaining staff, as well as the tremendous sense of commitment among staff. There was a lot of conversation about how to support staff in this challenging and sometimes difficult work, so that they have the tools, skills, knowledge, and support they need to do their jobs well. Several organizations noted a very challenging labor market, and the difficulty of competing with larger healthcare organizations in terms of compensation and benefits, especially with the ever-rising costs of health insurance.

- **"Our model is great, but small by definition".** Many of the small-to-mid-sized organizations in this project face a paradoxical challenge: their size allows them to be nimble and responsive, and their smaller-scale models are integral to their success. (For example, compared to larger congregate settings, a residential property with eight bedrooms that allow for privacy and a sense safety is seen as more supportive to mental health stability, the needs of families, and individuals with health conditions.)

- **Big-picture, solutions-oriented focus:** Although there is, of course, a strong focus on addressing the urgent, immediate needs of clients, most organizations are also expressing an interest in more systemic, longer-term solutions, such as programs that interrupt generational patterns of homelessness or create pathways out of poverty.

- **Holistic approach to clients**: Recognizing the complex needs that some clients face, organizations are focused on connecting clients to a range of services (legal assistance, health care resources, behavioral health resources) and to things like stabilization funds that help prevent a return to homelessness (for example, moving expenses or an unexpected car repair).

- **Moving toward 'healing-centered engagement':** Each organization uses different language, but there is a shared focus on personalized approaches to care, values-based decision-making, trauma-informed care, quality over quantity, client-centered advocacy, and working with clients to imagine futures where people are not just surviving but thriving.

- **Cautious approach to expansion:** Several participants voiced a concern that funders seem to have an appetite for building facilities, but have less appetite for investing in the kinds of supportive services that are crucial to addressing the complex needs of individuals and families who are navigating housing insecurity and homelessness. Even as organizations are expanding their facilities, they voice concerns about how they will fund the necessary services.

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[3] More info on nonprofit workforce shortages here: 2023 Nonprofit Workforce Survey Results
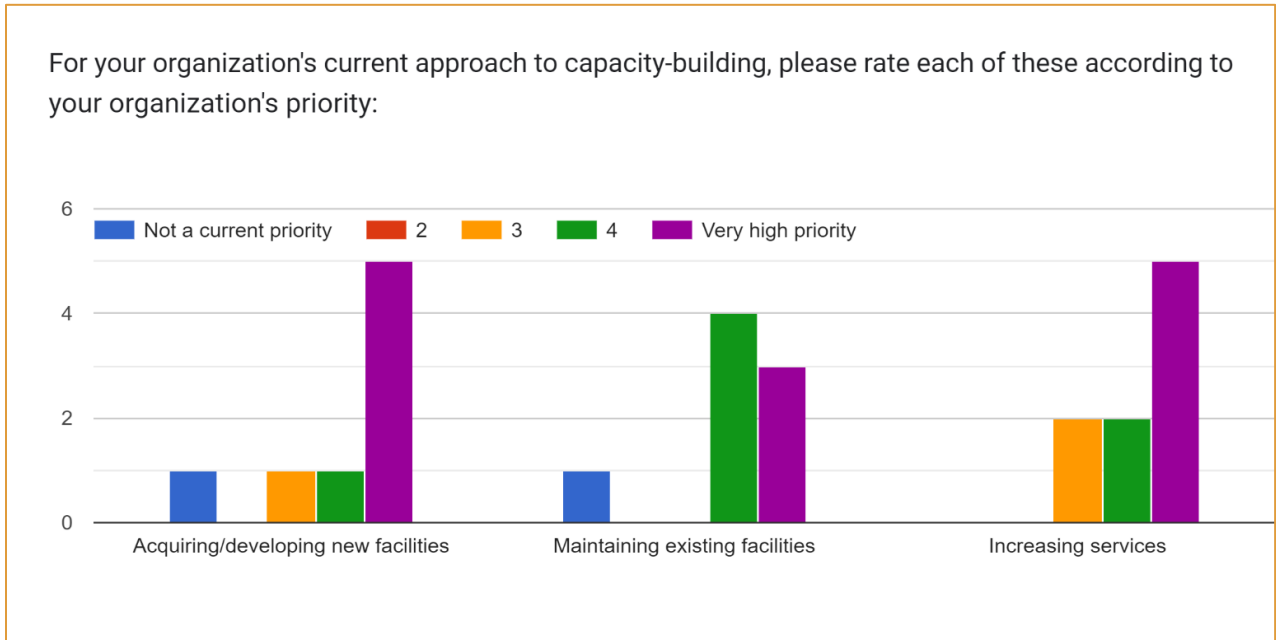
- **Need for updated technology and related training/customization:** Many organizations described old computers and outdated software that require cumbersome workarounds. Those with newer systems indicate that they need investments in training and/or customization.

- **Inadequate coordination and collaboration across organizations:** As one participant put it, "It can be really stressful for our advocates to bear witness to a client getting a closed door when we direct them to a resource, or we get the referral back. People have multiple needs, and we have to work together better to meet those needs."

- **Leadership staff have a complex portfolio of responsibilities:** Particularly in the smaller organizations, the executive director might be covering HR, finance, fundraising, grant-writing, tech, and project management.

See Appendix D for information on indicators of organizational health.

Expanding capacity: level of interest and priorities

Of the nine organizations participating in this process, eight indicated that they are planning to or are already working to expand within the next two years. One organization was unsure.

Balancing priorities: Project partners were interested in how organizations were balancing priorities among developing new facilities, maintaining existing facilities, and increasing services.

For your organization's current approach to capacity-building, please rate each of these according to your organization's priority:

Meeting needs across the Housing Spectrum: Participants were asked where their plans for expanding capacity fell on the Housing Spectrum[4]. Because many of the interviews uncovered a strong focus on supportive services, that topic was also included in the survey question.

What are your organization's priorities for expanding capacity?
Please check all that apply:

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[4] From Understanding the Housing Spectrum and Its Impact on Health

Priorities for organizational capacity-building over the next two years:

Survey question: Imagining that there is an organizational capacity-building fund with finite resources, please consider which of the following areas would be your highest priority over the next two years. Please rate each accordingly.

Responses. The top five priorities for capacity-building investments among the participating organizations are:

- o Investments in staff compensation and staff wellness
- o Investments to expand capacity through new staff positions
- o Investments in technology (ie, computers, software subscriptions)
- o Investments in operations and admin (policies/procedures, HR or financial systems, etc.)
- o Staff training and professional development

Participant comments related to capacity-building:

- I'd like to see capacity-building funding to bridge your current budget and your anticipated budget, with some check-points along the way.

- There's an enormous gap in planning and prep for expansion, before you see income from your services related to that expansion until they're launched. Need to understand the true cost workforce-wise, cost wise.

- Bridge funding would help get staff in place for set-up costs (furnishings, staffing, training, hiring process) - depends on the project, but two months of operating costs would be useful.

> If we're running as an efficient, effective organization, then by definition, we don't have staffing or the expansion potential to be able to grow, because it's so much work; and often, it's a multi-year effort which doesn't fit neatly into the annual funding calendar.
>
> ~Executive Director, housing organization

Staffing needs and priorities

Three of the top five capacity-building priorities specifically relate to staffing:

- o Investments in staff compensation and staff wellness
- o Investments to expand capacity through new staff positions
- o Staff training and professional development (see section below)

As mentioned earlier, several organizations discussed the challenges of hiring and retaining staff, as well as a strong focus on investing in staff so that they have the tools, skills, knowledge, and support they need to do their jobs well. Participants also described the need to expand staffing as a crucial foundation for expanding organizational capacity.

In addition, several organizations noted challenges related to their size and/or being relatively young as an organization:

- The executive-director-of-all-trades: in some of the smaller organizations, the E.D. is the only person handling administrative functions, from grant-writing to fundraising to HR to operations.
- Reliance on volunteers or very-part-time contractors for key operational functions (such as bookkeeping, grant-writing, or fundraising).
- As one participant noted, some of the younger and smaller organizations have had less time to invest in organizational systems, and have less experience navigating the complexities of government contracting and reporting.

Priorities for expanding staff roles, in ranked order:

1. Fundraising
2. Financial Management (incl. grants/contracts management)
3. Project Management
4. Case Management
5. Behavioral and/or mental health specialists

While these were the top areas of capacity-building interest in terms of staffing overall, individual organizations also had specialized needs in property management/maintenance, administrative staff, and communications.

Compensation and staff wellness

While staff compensation and staff wellness have been identified as strong priorities among participating organizations, an analysis of compensation levels and staff wellness programs is beyond the scope of this project.

> Burnout is huge and real. Nobody's talking about how we prevent trauma and reduce harm among our staff. Why aren't we talking about that in our community and in our government contracts? We're losing professionals from the sector because of burnout, and we're losing institutional knowledge because they're not being supported adequately.
>
> ~Executive Director, housing and shelter organization

Capital investment needs (excluding new facilities)

Some of the capital investment needs are fairly specific to a particular organization's situation (such as commercial washing machines, desks for new staff, and a transport van). That said, a need for technology investments are a common priority, and participants shared their frustrations with outdated/inadequate computers, phone systems, and software.

Please rate each of the following topics according to your organization's priorities:
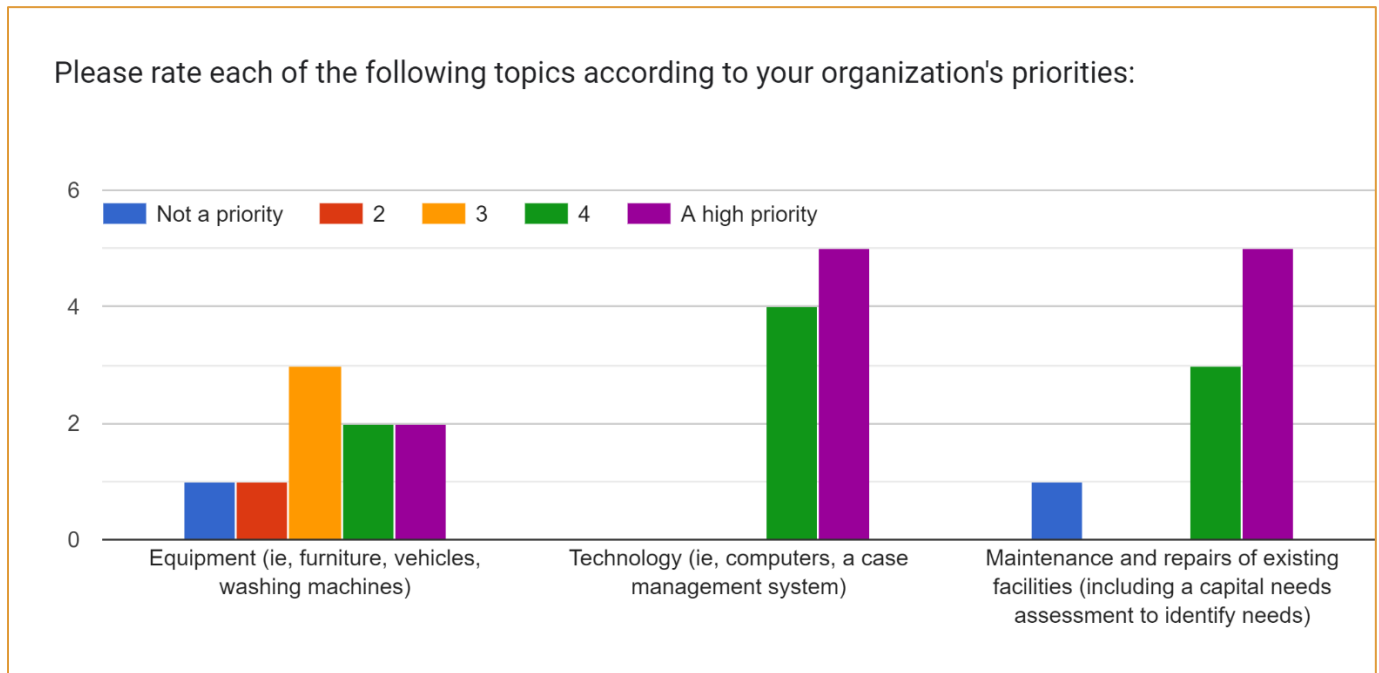
Several participants are very interested in needs assessments. Comments:

- Any additional focus on the technical side of capacity building would be so helpful - identifying networking needs and infrastructure changes that many smaller and mid-size organizations without a full IT department would otherwise struggle to identify and implement.

- I am especially motivated by the notion of a capital needs assessment to help us root out deferred maintenance issues that may not be on our radar, and to help us see around corner as much as possible.

- Learning to understand and implement a capital needs assessment and maintenance/management plan are the skills we have sorely needed this past year.

- The maintenance of our current aging facilities is a big hill to climb…We are seriously having to look at if we have capacity to continue maintaining them without a clear path to access funds.

- Our agency sometimes struggles with funding due to unforeseen costs that have arisen, particularly this year in regards to appliances breaking down and emergency repairs on the plumbing, heating, and cooling systems.

Training and professional development

Overall, there's a very high interest in support for training and professional development (seven of nine organizations rated this a 4 or 5). Several organizations also noted that funding for training is scarce. Some organizations are creative in their approach, such as finding free resources and holding staff-led lunch-and-learns, and some are able to make small investments or participate in state-provided training. Several organizations voiced appreciation for a recent de-escalation training provided by the County, and they are interested in similar community-based workshops.

At least two of the participating organizations already offer community-based trainings on client-related topics, and there may be an opportunity to engage those organizations as a resource for workshops.

Priorities for training in client-related topics

According to survey results, these are the top four areas of interest in client-related topics, in order of priority (at least seven organizations gave a rating of 4 or 5):

- Diversity, equity, and inclusion (seven of nine organizations rated this a 5)
- Client advocacy
- Trauma-informed care
- Maintaining appropriate and accurate client records and program data

There was also strong interest in the following topics, in order of priority:

- Conflict resolution
- Mental health first aid
- Harm reduction models and approaches
- De-escalation

Priorities for training/technical assistance in operations-related topics

According to survey results, these are the top four areas of interest in operations-related topics, in order of priority:

- Diversity, equity, and inclusion (coaching and technical assistance)
- Program evaluation / data collection
- Grant-writing / fundraising
- Technology (ie, Salesforce, other platforms)

There was also strong interest in the following topics, in order of priority:

- Strategic planning facilitation
- Nonprofit financial management
- Human Resources
- Policies and procedures

Preferred formats

According to survey results, these are the preferred formats for training and professional development (at least eight of nine organizations gave a rating of 4 or 5):

- Consulting or technical assistance to acquire and apply specific knowledge
- Community workshops (open to people from multiple organizations)
- Individual coaching for leaders and managers
- Regional or national conferences
- Workshops tailored to our organization

There was also strong interest in:

- Peer-learning groups (with a strong preference for facilitated vs. self-directed sessions)
- A healing fund for staff (self-directed, trust-based stipends to mitigate stress/burnout)

Training budgets

In estimating a realistic budget for training / professional development / tech assistance that would serve the organization's needs over a 12-month period, training budgets ranged from $150/employee to $7000/employee, with most responses falling between $500-$2000/employee. The overall average was $1960/employee. Comments make it clear that each organization took different approaches to assessing and quantifying their budgets, which explains some of this range.

Interest in a regional certification program

Related to the topic of training and professional development, a question was added to the follow-up survey to gauge interest in a topic that has been under discussion among COB and Whatcom County staff.

QUESTION: "Would a Whatcom County certification process with an associated series of client-focused / professional development trainings be of value to your agency and these staff? Please indicate yes/no/maybe, and share your initial thoughts on this idea."

See Appendix G for responses.

Peer learning and networking

Interviews revealed a strong interest in rebuilding and strengthening relationships across organizations, given staff turnover and the lingering effects of isolation during the pandemic. Several people said things like "I wish I could hear about how other organizations are handling _____". In discussing the idea of peer learning sessions, some also offered expertise that they'd be willing to share (such as employee wellness and retention; organizational culture; approaches to case management).

The follow-up survey included questions about what topics would be of interest, and these are the top five (at least seven of nine organizations gave a rating of 4 or 5):

- Accessing new revenue streams (developing earned income, identifying new funding sources)
- Pooling resources for contracted services (ie, IT support, bookkeeping, etc.)
- Case studies of successful projects (ie permitting, funding, project management)
- Holistic approaches to homelessness and poverty
- Strengthening case management practices

There was also strong interest in these topics (six of nine organizations gave a rating of 4 or 5):

- Understanding the resources available to clients: getting to know partner org's and staff
- Strengthening organizational culture

Elements that would make people more likely to attend:

- Collaborative presentations (multiple speakers on a theme, a lightly moderated conversation with time for Q&A and peer discussions)
- A goal-oriented approach, with topics available in advance
- Strong facilitation and a clear/organized structure
- Some time for networking among agencies, and across levels of experience and expertise
- Ongoing input from organizations about topics of interest
- Higher level discussions about capacity building, grant and contract management
- Learning about the work of other organizations and ways to collaborate
- Honest conversations and sharing of resources

Frequency and logistics:

- Six participants preferred a quarterly schedule; three participants preferred monthly
- Snacks and coffee were suggested
- While virtual meetings may be more convenient, several people indicated that they appreciate the benefits of meeting in person at least some of the time

Regional network and regional advisory groups

Several participants expressed a desire to rebuild connections among peer organizations, particularly given staff turnover across the sector, and the isolating effects of the pandemic. Needs and interests can be grouped into several categories:

- **Sharing knowledge and expertise:** There was a lot of curiosity about things like "How are other organizations handling hiring and staff retention in this market?" or "I'd love to know how they navigated the permitting process for that project".

- **Learning together:** There were several positive comments about the County's recent de-escalation training, and a recognition that community workshops have multiple benefits: developing skills and knowledge, strengthening the relationships among organizations, and stretching training dollars.

- **Clarifying what resources are available to clients:** to facilitate more coordinated efforts in meeting the needs of clients on an individual level.

- **Contributing to a more coordinated, systemic response** to homelessness and housing instability. One participant illustrated this point with some examples:

> "Years ago, the prosperity summit was convened to get a comprehensive look at how poverty was impacting our community and bridges to prosperity. I believe that this convening, data gathering and planning summit resulted in some clear recommendations, pilot projects and shared understanding of the issue. WITH the voice of those impacted included. I still see the results of this work present in org programs and positions today. The opioid summit was just convened with a similar feel to it. I would like to see a comprehensive housing summit to build shared understanding in a rather complex system. But if we had a guiding document and research assessment it could hopefully cut down on some of the duplicative meetings and set a path forward."

The survey also included questions about increasing participation in regional advisory groups.

See appendix F for further comments and suggestions.

Working with regional funders

In the interview process, several organizations suggested opportunities for regional funders to strengthen their approach to partnering with housing and shelter providers. While the experiences of individual organizations are varied, several themes emerged:

- **Participants indicate that the application, contracting, permitting, and reporting processes are often cumbersome, outdated, difficult to parse, and/or costly to navigate (in terms of both time and money):**
  - According to several participants, reporting requirements for the COB exceed what is required from State or County funders, and audits are required by the COB at lower level of funding compared to State or County funders.
  - As one participant said, "Some of the [COB]'s contract terms make me reluctant to accept money from the [COB], and the level of compliance monitoring that is more burdensome than what is required for their state funding."
  - According to another participant, "We get NOFA's from the County, but it can be hard for us to parse out if we're actually eligible." (This was a common theme: difficulty in making sense of the technical language of grant eligibility requirements, and a related need for technical assistance.)
- **Participants have had uneven experiences working with the municipal partners:**
  - Five of the participating organizations expressed frustration with a lack of transparency, assistance, and trust. One participant characterized the relationship this way: "It's easy to find out what WON'T work; it's harder to find out what WILL work within existing zoning requirements and funding restrictions."
  - On the other hand, two of the participants noted that City and County staff were helpful in the conceptual phase of developing their projects, and were instrumental in suggesting or connecting them to additional funding sources.
- **A strong desire for a more collaborative, transparent, and solution-oriented partnership with the COB.**
  - As one participant requested, "Please listen to service providers and what they put forth in terms of cost and necessary supports it takes to really run and manage [a program or facility], with approaches that are trauma-informed and have a healthy and thriving staff. This takes a significant investment in staff wellness, supportive schedules, family-flexible workplaces, supportive administrative staff, and training to maintain quality of programs."
- **A range of insights and recommendations for a better-coordinated and more holistic approach to homelessness and housing insecurity** (see Appendix E).

As one participant noted, municipal funders are not immune to staffing challenges:

- "It seems like every funder's staff is short-staffed to administer their programs, which affects us, but it's worth noting that better staffing to support speedy permitting and administration of other programs would be helpful."

The survey included follow-up questions, with priorities rated on a five-point scale.

These are the top priorities for technical assistance (at least seven of nine organizations gave a rating of 4 or 5):

- Technical assistance with strategizing how to capture more indirect costs within programs (all nine organizations were interested in this)
- Government Funders 101: An introductory session on partnering with municipal funders, norms and expectations, processes, opportunities, and where to get answers to questions
- Technical assistance in accessing state and federal funding
- Regular info sessions or office hours with COB or County staff about funding opportunities, contracts, permitting, etc.

While some of the following ideas – which were generated in the interview portion of this project – may not be actionable by municipal funders in the current regulatory environment, we included them in the survey to gather information for longer-term conversations among regional public and private funders about how to support this sector.

There was strong interest in all of these suggestions (at least seven of nine organizations gave a rating of 4 or 5)

- Where possible:
    - increase indirect reimbursement rate to reflect actual indirect costs
    - offer exemptions or alternatives to audit requirements for organizations with smaller budgets
- Where not required by state/federal restrictions:
    - streamline the application process
    - streamline reporting requirements
    - minimize constraints on funding
    - invest in unrestricted operating support
    - shift toward trust-based grant-making (see info about one model here: https://satterberg.org/trust-based-philanthropy/)

> If our government is going to rely so heavily on nonprofits and various agencies to do this work, then they need to be equally invested in making sure that these organizations can do this work sustainably.
>
> ~Executive Director, housing and shelter organization

See Appendix E for further comments and suggestions.

Recommendations for consideration

If there were no constraints on funding, the top recommendations would include bridge funding for staff expansion, including the possibility of multi-year commitments, and investments in staff compensation and wellness. However, in the context of a pilot year of an initiative with a known budget of $200,000, the following criteria were used to formulate recommendations:

- They address specific needs and shared priorities that were identified by participants (such as those outlined in the previous sections on staffing, capital investments, training and professional development, and peer learning and networking)
- They support multiple goals, where possible (for example, professional development opportunities that also help strengthen connections among organizations and between grantees and funders, as a foundation for a higher level of coordinated responses across the sector)
- They are cost-effective, given finite resources (by pooling resources and/or relying on internal staff, where appropriate, and by focusing on tangible, small-to-midsized direct grants that would meet specific needs of participating organizations)

At the end of this section, there is also a set of recommendations to consider for longer-term, larger-scale capacity-building investments.

Technical assistance opportunities and priorities

These technical assistance recommendations focus on efforts that COB and/or County staff could pursue, primarily using internal resources.

- **Pilot a series of information sessions related to government funding**
  - Government Funding 101: An introductory session on partnering with municipal funders, norms and expectations, processes, opportunities, and where to get answers to questions
  - How to track indirect costs effectively and capture those costs for reimbursement
  - Accessing funding from local, state, federal, and other sources (including existing funds that some organizations are not familiar with, including, notably, the COB's Emergency Repairs program)
  - An information session on the COB's Prevention of Homelessness initiative
  - These sessions could alternate with regular office hours with COB or County staff about funding opportunities, contracts, permitting, Q&A on projects, etc.
- **Strengthen partnership approaches with grantees and contractors**
  - Re-examine application process as well as audit and other reporting requirements to identify opportunities to streamline process and reduce demands on time and resources
  - Develop outreach strategies to help organizations connect with other funding sources, and understand their eligibility for various State, County, and COB programs.

- Develop case studies to illustrate successful projects, including timelines, budgets, and funding partners (building or renovating facilities)
- Consider funding administrative time and/or expertise that is needed to comply with reporting requirements.

- **Offer one-on-one technical assistance sessions on reimbursement rates**, and strategies for capturing indirect costs. 100% of participants said they'd be interested in technical assistance on how to capture more indirect costs within programs. One caveat here is that some participants indicated that they are reluctant to ask questions because they've either experienced resistance or lack of responsiveness from government employees, and/or they are concerned that their lack of knowledge will reflect poorly on their organization. It may be worth having a skilled third party provide these sessions.

Community-based training and professional development opportunities

There is strong support for additional community-based workshops, and a peer-learning series would be a complementary strategy to both share knowledge and strengthen connections among organizations in the sector. These are also cost-effective strategies, given limited resources.

- **Pilot a series of community-based workshops and peer-learning gatherings.** For example, one approach could be a nine-month series over 12 months, balancing a mix of facilitated peer learning (such as moderated panel discussions), third-party trainers, and technical assistance sessions with funders.
  - **Priority peer-learning topics:**
    - Accessing new revenue streams (developing earned income, identifying new funding sources)
    - Pooling resources for contracted services (i.e., IT support, bookkeeping, etc.)
    - Case studies of successful projects (i.e., permitting, funding, project management)
    - Strengthening case management practices
    - Holistic approaches to homelessness and poverty
  - **Priority client-related topics for community workshops:**
    - Diversity, equity, and inclusion (seven of nine organizations rated this a 5)
    - Client advocacy
    - Trauma-informed care
    - Maintaining appropriate and accurate client records and program data
  - **Priority operations-related topics for community workshops:**
    - Program evaluation / data collection
    - Grant-writing / fundraising

> There's a gap for how nonprofit leaders connect across all of the different service sectors. It can feel competitive. We need some vehicle for shared learning, and we need to rebuild the network post-covid. There's been turnover in the field, and things have changed in the environment that we need to have a coordinated response to.
>
> ~ Executive Director, housing organization

- o **Logistical considerations:**
    - ▪ Make the schedule of dates and topics available well in advance.
    - ▪ Include strong facilitation and networking time into the design of the series,
    - ▪ Evaluate each session to help shape future sessions.
    - ▪ Consider incorporating one or two of the technical assistance information sessions into the series.
    - ▪ See peer learning and networking section for more detailed information about what approaches would make participants more likely to attend.

Small-to-midsized direct grants (estimating $5,000 to $35,000)

Eligible projects could include:

- **Equipment:** While there are certain shared priorities among the participating organizations, there are also a range of unique needs for each organization (for example, several organizations need new computer equipment; one organization needs commercial washing machines; another needs desks and office equipment for new staff positions).

- **Needs assessments:** As mentioned in the section on Capital Investment Needs, there is a strong interest in funding for needs assessments, including:
    - o Capital needs assessments
    - o Technology needs assessments (for equipment, software platforms, phones, etc.)
    - o Assessments of financial and other administrative systems

- **Technical assistance:** Several organizations indicated that they would need an external party to support some areas of capacity building, either because of lack of time and/or lack of internal expertise. Topics of interest would likely include:
    - o Reviewing and updating policies and procedures, in general and to include a DEI lens. (A related question from one participant: "Could policy review and development be done across multiple organizations to leverage the investment?")
    - o Customizing and getting training on software platforms (Salesforce, etc.)

- **Professional development:**
    - o Community-based workshops and peer learning gatherings will address some but not all needs for professional development and training. Some organizations will also be interested in funding for more specialized opportunities such as conference costs, executive coaching, mission-specific training, etc.

- **Employee wellness investments:**
    - o While it's not clear exactly what each organization might apply for, this is clearly a priority for most, if not all, of the participating organizations. Some of them are already making investments in terms of policies (family-friendly scheduling, four-day work weeks, equitable case-management systems); others have secured one-time funding for staff retreats and staff care.

Considerations for larger-scale, longer-term investments in capacity

Consider developing dedicated pools of funding for identified needs:

- Organization-based pools of flexible funding for client stabilization needs (for example, car repairs, a rental application fee, deposit assistance, moving costs, etc.). In one program example, the check is written directly to the appropriate company, and the expenditure is approved by the client advocate as well as the executive director. Clients' needs for these small but meaningful amounts has increased, and funds have been depleted. And, as on participant pointed out, "From an equity perspective, BIPOC clients tend to come in with fewer resources, and while there are a few resources out there (a church here, a church there), it's very time consuming and logistically challenging for clients to access small amounts of money".

- Expand pool of funding for housing subsidies and vouchers

- A pool of funding for employee wellness investments

- Improve accessibility (and awareness) of quick-response funding[5] for maintenance and repair of facilities. It is not clear if participants are aware of the COB's rapid response funding, if the process/timeline presents challenges, if the needs in question are eligible for this pool of funding, and/or if other emergency funding sources need to be identified. (Some of the needs articulated—such as an HVAC system failure—may have been for administrative facilities that are not eligible for this particular pool of funding.)

- A rapid acquisition fund for non-profit affordable housing and supportive housing developers (i.e., organizations that use an adult family home model in residential neighborhoods)

Consider opportunities for sharing or pooling resources among nonprofits in the region:

- Some of the participants indicated an interest in pooling funds to have part-time access to professional expertise that is currently difficult and/or expensive to secure, such as bookkeeping/accounting, grant-writing, and program evaluation. (On a related note, there is also frustration that some of their current approaches—whether it's through a part-time contractor, a volunteer, or staff—don't always have the necessary expertise related specifically to non-profit financial management or managing government contracts.)

- Secure more affordable audits and financial reviews.

- Investigate options for a pooled health insurance program for regional nonprofits.

- Consider investing in 'navigator-type' positions suggested by participants: a landlord liaison role, an affordable housing advocate, and resource navigators that would help clients with complex needs connect to the appropriate services.

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[5] The COB offers relatively rapid-response funding for emergency housing repairs, or emergency facilities repairs on buildings offering direct service to clients as either (potentially deferred) loans or recoverable grants. Most other housing repair & maintenance funding must be accessed via annual funding cycles. Upkeep of nonprofit administrative (non-direct service) facilities is not an eligible use of COB funds. https://cob.org/services/housing/funding-opportunities/partnerships-funding

Build toward multi-year grants for staff positions needed to expand capacity:

- With input from organizations, develop examples of what would be funded.
- Articulate priorities and criteria.
- Provide technical assistance and information sessions about the initiative.

Consider ways of creating a more comprehensive and coordinated response to the complex issues of homelessness and housing insecurity that organizations, funders, and policy makers are working to address.

While participants are certainly focused on maintaining and expanding the capacity of their individual organizations to meet community needs, they also discussed the challenges of policy and funding constraints, as well as a need for better coordination of efforts. They expressed an interest in seeing more comprehensive and coordinated strategies[6] on multiple levels: among service providers, in partnership with funders and policy makers, and across public/private/nonprofit sectors.

While it's beyond the scope of this project to make specific policy recommendations, participants raised several policy-related ideas that are worthy of further consideration. Here are a few examples, in the words of various participants:

- Our clients bring complex layers of need, and we can't separate out the various needs–housing, mental health, substance use supports–from housing. We need to continue to invest holistically in our programs, not just housing.
- We need, across organizations, to take a harm-reduction approach and we need to get aligned on that.
- At a community-wide, systems level, we've got to figure out a way to increase housing density and create more affordable housing. We can't continue to maintain strict ordinances and building codes that prohibit this and expect to make a dent in the issue of homelessness.
- We need to talk about relationships with for-profit landlords and property management companies, to help reduce the us-vs-them mentality, which isn't helpful. [We need to find] ways to involve all necessary stakeholders—clients, landlords, funders—in one conversation.
- Single adults make up 85% of the unsheltered population, but they have the least amount of resources available to them.
- We need to engage client voice in system-level planning.

More comments are included in Appendix E.

> This is hard, complex work, and it's not just about shelter…. You can't talk about shelter without talking about all of the other things that go into supporting an individual, their psycho-social needs, behavioral health, resource navigation.
>
> ~ Executive Director shelter organization

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[6] For an exploration of one city's approach, see this article in *Governing* on How Houston Cut Its Homeless Population by Nearly Two-Thirds

Appendix A: Interview and survey participants

Many thanks to the following people and organizations, who were generous with their time, perspectives, and insights as participants in this project:

- Adrienne Renz, Executive Director, DVSAS
- Alle Schene, CFO / Acting CEO, YWCA
- Ashley Buerger, Executive Director, Road2Home
- Ashley Thomasson, Executive Director, Lydia Place
- David Ellsworth-Keller, Homeownership Program Director, Kulshan Community Land Trust
- Dean Fearing, Executive Director, Kulshan Community Land Trust
- Devin Connolly, Executive Director, Interfaith Coalition
- Elizabeth Page, Executive Director, Sean Humphrey House
- Hannah Osborne, Executive Director, Sun Community Services
- Jason McGill, Executive Director, Northwest Youth Services

Appendix B: Invitation letter

April 24, 2023

Good Morning,

The City of Bellingham, Whatcom Community Foundation (WCF), and Shorthand Consulting have teamed up to assess the capacity-building needs of small-to-mid-sized nonprofit organizations providing housing and shelter services in Bellingham. We are inviting you to participate because your perspective and insights into your work would deepen our understanding of what is needed to better support the capacity of our housing organizations. The City has funding set aside for supporting capacity-building in the coming year and is committed to working collaboratively with other funders to develop a capacity-building program to assist organizations in an ongoing way.

If you accept this invitation, the process would involve committing time to think through a number of questions and discussing them with others on your leadership team. After internal preparations, you would meet with Sara Lawson of Shorthand Consulting for an interview to discuss your responses at a mutually agreeable time.

We recognize that recent years have brought tremendous strain to organizations and staff, and simply maintaining existing capabilities has been a challenge for many. Capacity support is clearly a need, and as a precursor to developing a program, we would like to hear about your key operational challenges and learn about the kinds of organizational supports that would help to sustain and/or expand your capacity to deliver housing and shelter services.

If you are interested in participating, Whatcom Community Foundation is pleased to provide a $1,000 grant to your organization in recognition of the time needed to thoughtfully engage in the process. Participation means thinking through questions provided ahead of time in consultation with your leadership team in preparation for the interview, engaging with Sara in the interview, and completing the follow-up survey. We expect your time commitment to be between 4 and 8 hours in May and/or June. Your responses will allow Sara to advise the City and other potential funders on how to strengthen support for housing provider capacity.

Please reply to Samya Lutz, slklutz@cob.org, by April 28 to let us know whether or not you want to move forward with this opportunity. Once we have confirmed your participation, you can expect an email from Sara Lawson about next steps.

Thank you,

Tara Sundin	Mauri Ingram	Sara Lawson
Samya Lutz	Pamela Jons	Shorthand Consulting
Planning & Community Development	Whatcom Community Foundation	

Appendix C: Interview questions

As you review and discuss these questions with your leadership team, please consider them within the following context:

- Please think about what is needed in the context of the current reality of today's laws and rules (for example, current zoning regulations, existing federal requirements for grant reporting, etc.).
- The focus of this conversation is on your specific organization and its capacity, not on the substance of housing or shelter work itself.
- For the first few questions, it may be useful to refer to the Organizational Capacity Framework[7] to fully consider the different facets of how your organization operates and what makes it effective. (Framework created by the Corporation for National and Community Service).

Key questions:

- What do you do really well? What are the key strengths of your organization that enable your best work, and need to be maintained?

- What are the biggest challenges or 'pain points' that you are facing as an organization? What's the impact of those challenges?

- What kinds of organizational supports have helped bolster your strengths, or would help to address your challenges, so that you could more easily *sustain* your organization's current level of facilities/services? Thinking of it another way, what, specifically, would you ask for in a funding proposal? (For example, training in X, equipment for Y, a qualified service provider for Z, etc. Please don't be limited by these examples, though.)

- To spark conversation among your team, imagine a scenario where your board of directors is discussing the feasibility of doubling or tripling your capacity over the next 3-5 years, to meet pressing needs in the community. What are the questions and concerns that would come to mind for you and your team? What would be the biggest priorities? What would be the biggest challenges?

- If your organization is considering or planning to *expand* your capacity, what kinds of supports would be most useful in advancing that effort? Thinking of it another way, what, specifically, would you ask for in a funding proposal, to be able to significantly expand your capacity (# of beds available, people housed, needed services offered, etc.)?

- Do you have any feedback on how the project partners and other funders could strengthen their approach to partnering with housing and shelter providers, in terms of enhancing capacity and/or minimizing barriers? If there are ways that they could better support your organization, what would be most helpful?

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[7] Framework created by the Corporation for National and Community Service

# Appendix D: Indicators of organizational health

Although this project was not designed to provide full organizational assessments, we included questions about two topics that can be considered indicators of organizational health.

Financial health: As one indicator of organizational health, we asked how much of a financial reserve each organization currently has (available funds to cover operating expenses, measured in terms of how many months the funds would cover, without any additional funding coming in).

[Propel Nonprofits](#), a Minneapolis-based nonprofit whose mission is to build financially healthy nonprofits that foster community vitality, explains how an operating reserve works:

> An operating reserve is an unrestricted fund balance set aside to stabilize a nonprofit's finances by providing a "rainy day savings account" for unexpected cash flow shortages, expense or losses. These might be caused by delayed payments, unexpected building repairs, or economic conditions. Reserves should not be used to make up for income shortfalls, unless the organization has a plan to replace the income or reduce expenses in the near-term future. In short, reserves should be used to solve timing problems, not deficit problems. A commonly used reserve goal is 3-6 months' expenses. At the high end, reserves should not exceed the amount of two years' budget. At the low end, reserves should be enough to cover at least one full payroll.

All organizations had at least one month of reserves, six organizations had at least three months of reserves.

Operating reserves, in months
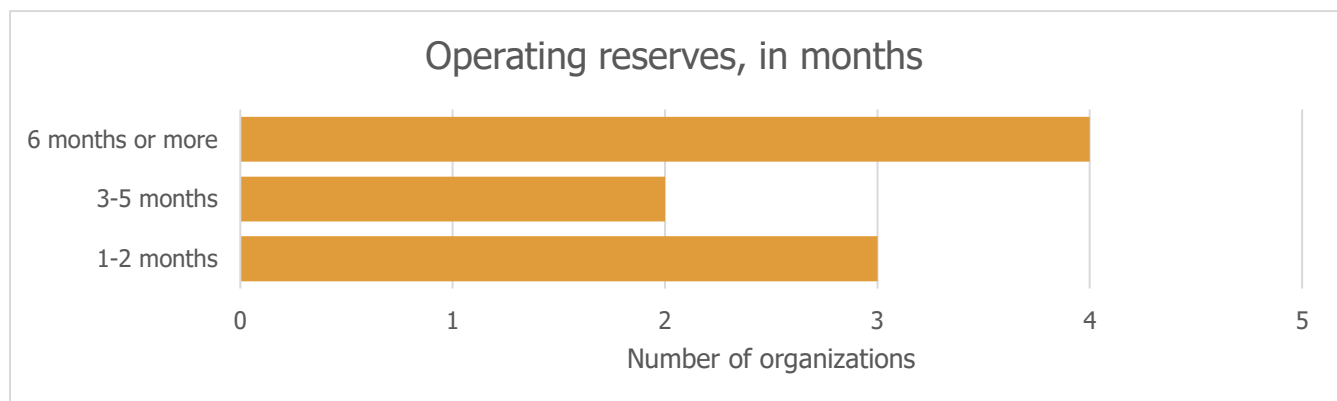
Board effectiveness It appears that boards are most effective in their financial and legal oversight, and slightly less effective in engaging in organizational strategy. Recruitment and onboarding appear to be the biggest board challenge for at least a couple of the participating organizations.

As another indicator of organizational health, how would you rate your board on the following:
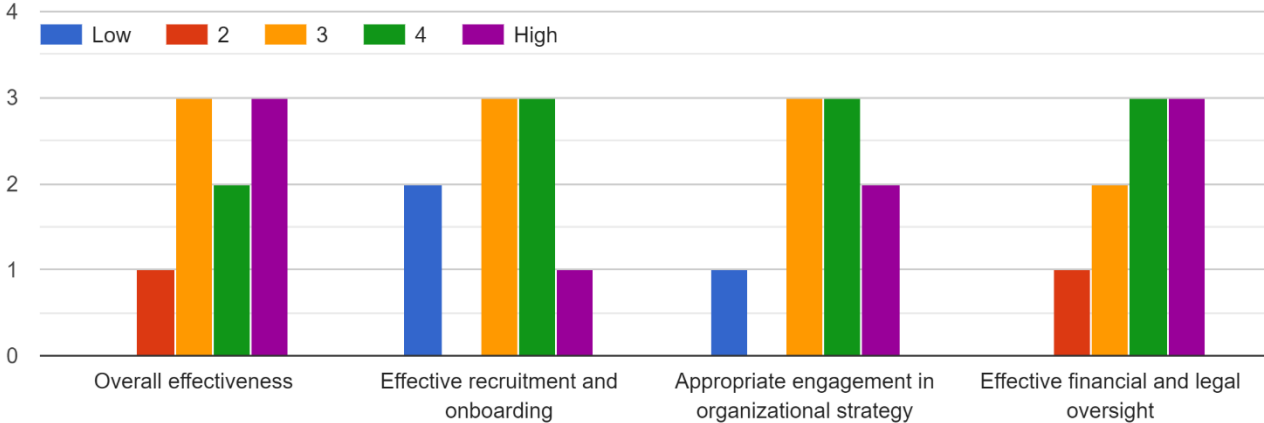
Appendix E: Feedback and suggestions on partnering with regional funders

These comments are a combination of quotes from interviews and written comments from the survey. They have been lightly edited for clarity and to remove potentially identifying information. They have been grouped into themes. (Naturally, some comments address multiple themes.) In this context, 'City of Bellingham', 'City', and 'COB' references are used interchangeably.

Comments related to applications, contracts, and reporting

- I would like to see audit requirements from the City that are in-line with state and federal funders. Current restrictive requirements de-incentivize partnering with the City of Bellingham.
- When we partner with the State, the contract terms feel very reasonable and I feel like we're being engaged as a partner. That is not the case with the City. The contract terms make me not want to take money from them. For example, we have to have a full audit (which is not required by the State or County) if we receive 50K of funding in 2 consecutive years. We were quoted 35K for an audit.
- Some processes are antiquated (for example, wet ink requirement for signing contracts).
- The process is very opaque for smaller organizations or newer staff – what's appropriate, how to request things.
- There is so much more paperwork required of clients, which isn't a trauma-informed approach.
- When a contract start date starts a month before a program start, it's not enough time for staffing up and training before doors open.
- It would be great to break down barriers to permitting. Mentoring from the City is key to expanding housing. This might be a government funding 201 workshop, along with accessible staff, continued mentorship.
- Support measuring outcomes – if proven results are a stipulation of funding, support the process of measuring outcomes.
- Simplify reporting requirements.
- Partial funding of a project should equal partial reporting. Can we report on success of a program as a whole even as a funder supports a percentage of that program? This would streamline and lead to better program evaluation and better use of staff time.
- It's challenging to keep up on changes to funding and reporting requirements – we have spent hours of staff time trying to figure this out and put square pegs into round holes. The funding has made a lot of things possible, but it's also made things more complicated: we have to use this pot of money within 3 months, that pot of money within 6 months, and each pot has different restrictions.
- At the State level, they implemented a new reporting system. The old system used to take 15 minutes; this year it took about 60-80 hours to upload multiple years of data into the new

system, and our CRM doesn't work with that system. It also sounds like they're not using the data that's getting uploaded.

- We use HMIS (homeless management information system, used across US) to track folks in our service area. Whatcom HMIS system doesn't coordinate with Skagit County, for example.
- Without the platforms for storing data and allowing interoperability across technology (payroll and timekeeping, donor management, client tracking etc) we cannot efficiently do our work or leverage our funding sources. With our technology costs, non-billable expenses (accounting, etc.) and our admin time, government contracts and most grants do not adequately pay for the actual expenses we accrue in making the programs we run possible.

Funding-related comments

- We get NOFA's from the County, but it can be hard for us to parse out if we're actually eligible.
- We started trying to pursue CDBG funds and it was really confusing. It was hard to determine if we would be a fit, and we couldn't get clarity on that from the planning department.
- Sustainability of funding for rent subsidies – rent has doubled, funding doesn't go as far, wages haven't increased to keep up with COLA and rent increases.
- Is there funding from VA for veterans?
- Is there funding available related to diversion programs associated with the new jail (justice dept initiative)? We would like to see dedicated beds for people coming from jail and/or having interactions w/ law enforcement, with appropriate supports in place (re-entry specialists and mental health professionals).
- We need to be willing to pay for substance use disorder specialists.
- Previously, rent subsidies were the easiest way to support stable housing, now there's such limited vacancy and rents are so high, so that's no longer the solution. We need more housing inventory.
- More section 8 housing vouchers - this has been critically essential for rapid rehousing.
- Landlord incentives in the face of so much competition for rentals.
- We would like to see funding for small repair loans to homeowners for repairs and improvements.
- It would be helpful if funders posted estimated dates for when next rounds of funding will be open (in the absence of that, we have to keep checking back, and we have enough to do)

Comments related to collaboration, trust, and partnership

- I appreciate the Executive Director roundtables [run by the Whatcom Community Foundation].
- Last year's de-escalation training… was awesome.
- The City made time to talk about our project in the idea phase – we didn't have to come to the table with the idea fully hatched.
- The new planning director is very accessible.

- I'd like to see more outward communication about program successes. There is so much good work that's happening, and the community doesn't know about it.

- Seems like there are several different housing groups out there that are all discussing housing – why is there more than one? We are spread thin. Seems like the same convo's, doesn't seem to lead to coordinated action.

- We've put so much money into housing as a community. We haven't solved the problem, but a lot has been happening: what is succeeding, and what are we learning? We need to have some appetite for risk, and to be willing to learn together. There's not a one-size-fits-all solution.

- I would enjoy a way to meet new funders to partner with as well as maintaining our current partnerships. Many partnerships develop from relationships. It would be great to meet new folks interesting in funding organizations.

- The City and County are great advocates for us to help us get to state-level funding sources. It may be that other organizations would benefit from a more concrete approach to helping us all access state and federal funds.

- Thank you to the City for their partnership with our organization - and this commitment to continuous improvement.

- I wish funders would respect our direct service expertise and leverage that, and our knowledge of the people we work with.

- City staff doesn't seem to trust our organization. Our opinions aren't trusted, and it seems like that's been a pattern for a long time, and that creates a lot of tension. Not all City staff, but it harms the partnership. We hear from the County, "you are the leaders in this work, you are the experts", and they show it by listening to us when we tell them if something is not going to work, and that we need to pivot to something else.

- We get feedback on what is NOT going to work, but it would be nice to have a conversation about what WOULD work (with current zoning, etc.). We are much more interested in finding solutions that work, and getting on a path to implementation. We see other organizations get projects approved and into development, and I know it takes a lot of work to get there. It's easy to find out what won't work, but it would be nice to work together on what would work.

- Listen to service providers and what they put forth in terms of cost and necessary supports it takes to really run and manage, that are trauma-informed and have a healthy and thriving staff. This takes a significant investment in staff wellness, supportive schedules, family-flexible workplaces, supportive administrative staff, and training to maintain quality of programs.

- I agreed to be a part of this to be a good partner, but I've been a part of things like this before and it turns out to be a waste of time because nothing different happens after the initial conversation.

- A landlord liaison role could break down some barriers and open up some new partnerships.

- It would be great if there were an affordable housing advocate who helps us work through the technical government language, and to see more of a customer service model to help us navigate the system.

- It's hard to not have a place to connect people that have concurrent issues, to support them in legal issues, behavioral health, substance use issues. It would be good to have a service contracted so that there's a soft handoff.

Policy-related comments

- This is hard, complex work, and it's not just about shelter. That's what our government partners are missing. You can't talk about shelter without talking about all of the other things that go into supporting an individual, their psycho-social needs, behavioral health, resource navigation.
- We need, across organizations, to take a harm-reduction approach and we need to get aligned on that. That way, people are more likely to not get kicked out of housing once they get it.
- Our clients bring complex layers of need, and we can't separate out the various needs– housing, mental health, substance use supports–from housing. We need to continue to invest holistically in our programs, not just housing.
- At a community-wide, systems level, we've got to figure out a way to increase housing density and create more affordable housing. We can't continue to maintain strict ordinances and building codes that prohibit this and expect to make a dent in the issue of homelessness. This is going to mean that single-family-home neighborhoods are going to need to expect and embrace change.
- We need to talk about relationships with for-profit landlords and property management companies, to help reduce the us-vs-them mentality, which isn't helpful. Finding ways to involve all necessary stakeholders - clients, landlords, funders – in one conversation.
- We need to engage client voice in system-level planning.
- Single adults make up 85% of the unsheltered population, but they have the least amount of resources available to them.
- Funding is really restrictive – the requirement of being homeless at the time of program entry in relation to the requirement of being homeless at the time of being moved into housing is problematic. This system makes people rely on emergency shelters. It is also not culturally responsive – we have had clients who are tribal members or in the Spanish or Russian-speaking communities out in the county where there is more of a culture of community support and taking each other in, and they may not have a roof over their head every night, but we see those populations bouncing around from friend to friend, and that makes them not eligible for housing placement.
- We would like to see a better vetting process of contractors. Maybe organizations can work with the City and County to vet contractors who are providing training and services, so that from an equity lens, providers are attending to how to engage respectfully with not just white folks who are experiencing homelessness, but BIPOC folks. There can be differences in how people with different identities and backgrounds show up, and we need to make sure we understand different behaviors so that we're not defining those behaviors as a threat to safety.

Appendix F: Participation in advisory groups

While it wasn't a primary focus of this project, we asked survey participants for their recommendations about how to encourage more participation in regional advisory groups. Here are their responses, lightly edited for clarity and to remove identifying information.

Question 1: Do you have specific recommendations about how existing advisory groups could be more accessible or open (such that participation would be easier)?

- I am new to my position, so I may not know about all existing advisory groups. Is there a place that these groups are advertised? I believe making a group as comfortable as possible helps the conversation grow. Less structure, more comfort amongst friends, more growth.

- I am not sure what advisory groups currently exist, but having costs low and making the group known openly through the Community Resource Network that is released every Friday by the Opportunity Council and through North Sound ACH's newsletter, as well as other common publications, would be a great start.

- Maybe routine monthly meeting schedules, either in person or online, and specific topics/focus areas identified? I am unsure if there is a master list anywhere of existing advisory groups and meeting times (that may be impossible) but maybe there could be a shared calendar that any of us could contribute known meeting dates to so that anyone who checked the calendar would be able to register and participate?

- Part of the issue is that a lot of advisory groups are siloed within the larger agencies and it can be harder for smaller organizations to engage with these groups whether due to staffing difficulties or because they aren't being considered as a larger part of the social work community due to their size.

- Every proposed solution or big idea in Whatcom County seems to default to large housing providers who then want everyone to adjust to their standards. Some of that is part of their own grant compliance…, but we have found it difficult to work with them even outside of those areas of concern. My recommendation would be to not put an advisory group in the hands of large providers, because to do so would stifle other voices in the room.

- As a home ownership program, it would be helpful if there were a facilitated group of home ownership providers. This could be for profit and non-profit. The general discussion could be collaborating on more home ownership opportunities county wide.

Question 2: Do you have specific recommendations about how existing advisory groups could be more effective (such that participation would be more worthwhile)?

- Build in a guest/client advisory panel, perhaps with issue-specific primers about what will be discussed, what has been attempted, opportunities, constraints, etc.

- I think sometimes less structure is more beneficial to learning. Having a casual conversation where folks are invited to come discuss a certain topic(s) and learn from each other, share experiences, etc., would be something our organization would enjoy participating in.

- We have SO much wisdom amongst individuals and throughout organizations in our community, it would be great to have a platform to pool ideas/info and share across the group. Having a variety of structured and unstructured opportunities for learning is helpful. Advisory groups could be a useful way for creating templates that I mentioned above, since in theory, they have experience in the topics they are advising, and tasking them with specific sticking points to problem solve as case studies could be really useful learning experiences.

- I don't have any advice on this one - the PAT group that I have observed seems bogged down with criticism and conflicting priorities - and also an incredibly diverse set of needs/organizations.

- Advisory groups can have meetings and make recommendations, but if those recommendations are not taken, it can feel disheartening and cause involvement in those groups to drop.

- There is a disconnect between the work on multi-family housing providers and home ownership providers. Often meetings seem specific to the work of multi-family providers. There is growing interest in the community to discuss home ownership as the lack of affordable homes is impacting our local economy. It would be great to have a group form to specifically focus on affordable home ownership.

- More coordination between groups. Lots of groups doing similar work but not coordinating/communicating.

- To strengthen ecosystem: a third party to facilitate community conversations/convenings re: action steps is not necessarily a skillset that is observed in community meetings. We need to stop talking in circles as a community and come up with some actual plans, to keep meetings on track, clarify action steps.

Appendix G: Considerations on a certification process

This question was included in the survey to gauge interest in a topic that has been under discussion among COB and County staff.

QUESTION: Would a Whatcom County certification process with an associated series of

Client-focused / professional development trainings be of value to your agency and these staff?

Please indicate yes/no/maybe, and share your initial thoughts on this idea.

RESPONSES:

- No, I do not think so at this time. We have annual training requirements for staff and Board that are required by *[identifying information removed re: narrow mission focus]*. Adding further training requirements that would potentially play into access to funding and resources would be an additional burden rather than a removal of any of the current burdens in the system.
- If these are generic and tailored to case managers, it would not be helpful. If they were specific to *[identifiable information removed re: narrow mission focus],* then yes.

- Maybe - I am curious about the certification and what would go into it. Need more info.
- Maybe. We would be open to exploring any opportunity for training. However, I take pause when hearing of a local certification process because I question the efficacy and worry about a number of implications such a process may have if adopted widely in the community. We see a lot of inner circle attitude in our community and my hope would be to see something that is actually useful and not tip toeing around agendas.
- Maybe. Being able to dictate which trainings my staff go to can be helpful as some are more applicable than others given the population that we serve. I currently have a series of trainings that staff are required to complete upon hiring, but from there, the process becomes far less centralized and trainings are assigned as deemed necessary.
- Maybe

- Yes. We still feel like we fly by the seat of our pants most of the time with regards to standards and ongoing training.
- Yes. I like this idea as I believe staff could benefit from trainings, but it could also be a way of having different organizations throughout the community combine and learn from one another (if the trainings were done together).
- Yes - that is a fascinating suggestion, and I can see so much potential to be gained - great idea!