Creating a Data Collection Tool for Habitat for Humanity MetroWest/Greater Worcester

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By:
Samuel Casey
Vincent Lucca
Sean McAllen
Troy Sullivan

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Report Submitted to:

<u>Project Sponsor</u>
Molly Pietrantonio
Habitat for Humanity MetroWest/Greater Worcester

<u>WPI Faculty Advisors</u>
Professor Laura Roberts
Professor Robert Krueger
Worcester Polytechnic Institute

Appendix:

Appendix A: Abstract

Our team worked with Habitat for Humanity MetroWest/Greater to construct a data collection tool. Prior to the creation of this tool, Habitat MW/GW had trouble communicating with its partnered families. This tool will enable the Habitat MW/GW to improve its relationship with families and convey the effectiveness of their organization to funders. Through research, and by interviewing philanthropists and partner families, our team was able to craft a tool that will fit the needs of all parties involved.

Authorship

Appendix	Primary Author	Primary Editor
TOC	Drafted by All	Edited by All
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B: Introduction	Drafted by All	Edited by All
Authorship Page	Casey/McAllen	Edited by All
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C.6 Manual Design	Drafted by All	Edited by All
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Appendix B: Introduction

Housing costs have increased greatly since the late 1980s, while median national income growth among lower income families has remained stagnant (Joint Center for Housing Studies (JCHS, 2018). This has created a growing housing affordability issue, exacerbated by federal policy moving away from public sector housing assistance in the same time period. Homeownership began to steadily fall throughout the 1980s. Government policy cut funding in areas such as housing subsidies and public housing rehabilitation (Moore & Hoban-Moore, 1990). These funds would have been allocated to provide housing assistance for low-to-moderate income citizens (Moore and Hoban-Moore, 1990). Prior to these legislative acts, the Federal Government provided almost all housing support for low and low-to-moderate income families (Moore and Hoban-Moore, 1990).

When federal policy began to move away from supporting public housing, the affordable housing situation grew into the all-time-high of cost-burdened households in the United States that exists today(JCHS, 2018). The Federal Government withdrawing direct support for affordable provisions in the housing sector has drastically increased the role that nonprofit organizations have had to play in alleviating the burden of rising housing costs (JCHS, 2018; Moore and Hoban Moore, 1990). One local nonprofit organization with a mission to fulfill the need for affordable housing is Habitat for Humanity MetroWest/Greater Worcester (Habitat MW/GW). Habitat MW/GW provides homeownership opportunities to residents in 42 cities and towns in the MetroWest/Greater Worcester region of Massachusetts (Habitat MW/GW, n.d.).

Habitat MW/GW finds that communication between the organization and partner families falls off after the families become homeowners, making it difficult to collect data. This data could be used to determine if their partner families are leading successful lives, as well as demonstrate the success of Habitat MW/GW's program as a whole. Data and feedback are vital for the growth of an organization like Habitat MW/GW because regular feedback from constituents will help them improve their services they provide. (Morley, Vinson, & Hatry, 2001).

Nonprofit organizations like Habitat MW/GW have recently been pressed to prove the success of their programs to donors. Individuals and organizations who donate their money wish to see that the recipients use it successfully (Thompson, 2011). As such, Habitat MW/GW is exploring new methods with data collection tools such as surveying in order to gather information about their partner families. Surveys are effective data collection tools that can be used to fulfill this need (Iarossi, 2006). They are great when wanting to make inferences about a population. (Powell & Hermann, 2000).

The goal of this project is to develop a data collection system for Habitat for Humanity MetroWest/Greater Worcester. The system will help Habitat MW/GW make internal improvements as well as prove their success to funders. The objectives are to develop the data collection tool, to pilot the tool, and to create a user manual on the future use and modification of said tool for Habitat MW/GW. We found our system was successful since we improved response rates and got valuable responses from partnered families.

In the following chapters we present the background, methodology, findings, and conclusions and recommendations. The background will elaborate on our problem and the motivation behind our project. The methodology chapter will justify what we did and how we did it. The findings will make meaning from the data we collected. And the conclusions and recommendations chapter will summarize our findings, and offer advice for the project currently and in the future.

Appendix C: Background

Nonprofit housing assistance organizations have become increasingly vital for the housing of low income individuals nationwide. Today, nonprofits are being pressed to demonstrate success in achieving their mission to foundational funding sources. In this chapter, we first explain the past and current affordable housing trends in the United States of America. Section 2 addresses how nonprofit organizations are alleviating the burden of rising housing costs in the country. Section 3 goes in depth about our sponsor, Habitat for Humanity MetroWest/Greater Worcester, and the process to become a partner family. Section 4 describes the justification of a nonprofit's need to measure their success. Section 5 highlights how measuring success is possible through the use of surveys and databases and section 6 describes steps and details in creating our manual for Habitat for Humanity to administer surveys in the future.

Appendix C.1: The Affordable Housing Trend in the United States

Homeownership rates of young adults in America have been declining since 1988 (JCHS, 2018) In addition, renters are now spending significantly more of their income on housing than in previous decades. The growing difference between the growth of rent and home prices coupled with minimal income growth of low to moderately low income renters and homeowners makes every dollar earned valuable. That being said, individuals are becoming more hard pressed to find adequate affordable housing (JCHS, 2018). Primarily, this chapter focuses on past and present housing affordability trends that have led to housing becoming more expensive and unaffordable for those of low to moderately low income ranges. Other topics include federal policy dating back to the 1980s that alleviated government responsibility to provide adequate low income housing, and policy as recent as 2018 that cuts funds to would-be low income housing support.

Appendix C.1.1: Housing Affordability Down, Cost of Living Up

Over the past 30 years, the median price of all forms of housing and overall cost of living has increased, while income growth among low-to-moderate income families has stayed the same (JCHS, 2018). From 1990-2016, the national median rent cost rose 20% faster than inflation and median home purchase prices rose 41% faster than inflation (JCHS, 2018). Furthermore, the bottom quartile household median income has increased only 3% from the late 1980s to 2016 (accounting for inflation) (JCHS, 2018). As housing costs of both owned and rental forms have increased, those with lower incomes do not have the accompanying income growth to financially contend which can be visualized in Figure 1 below.

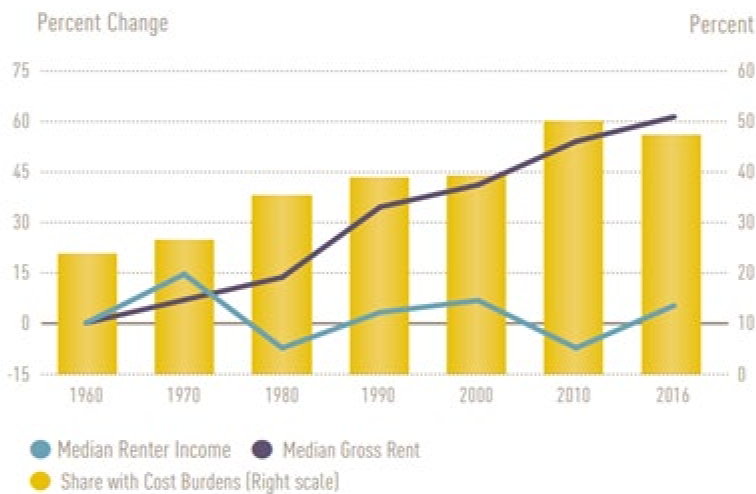

Figure 1: Median Gross Rent Price and Median Renter Income Growth from 1960-2016 (JCHS, 2018)

As a result of the housing affordability decline, the number of families who spent more than 30% of their income on housing has increased (JCHS, 2018). A family that spends more than 30% of household income on housing is considered to be housing cost-burdened (JCHS, 2018). Cost-burdened families experience foreclosure and evictions more often and are at a higher risk of living in high poverty neighborhoods (Bostic & Lee, 2008). In 2016, 38.1 million households nationwide were cost-burdened (JCHS, 2018). This same statistic has risen by 6.5 million households since 2001. Also, the total number of cost-burdened renters has doubled since the 1960s. At that time, 23.8% of renters were cost-burdened, compared to 47.5% in 2016 (JCHS, 2018). Median rent payments rose 61% between the years of 1960 and 2016, while the median income of a renter grew only 5% (see Figure 1). This growing disparity between housing costs and household income applies to more than just renters. During the same time period, home values have increased 112%, while homeowner income has only risen 50% (JCHS, 2018). In short, housing expenses are growing, requiring a greater percentage of an individual's income in order to afford it. Because of this, the increasing amount of cost-burdened families are statistically left in unfavorable living situations.

Another indicator of living expense is the Consumer Price Index (CPI). The CPI is used by the Bureau of Labor Statistics to measure the average change of prices paid for consumer goods over time by urban consumers (Consumer Price Index, 2018). The CPI demonstrates the change in costs of normal goods, demonstrating the growth in overall living costs. The consumables that the CPI encompasses include food, durable goods, and services such as transportation and medical care (Consumer Price Index, 2018). In Figure 2, the 12-month percent change in CPI over the past 10 years shows a rising cost of consumable goods, as the CPI increased approximately 2% from each prior year dating back to 2010. One product that demonstrates the rising CPI is gasoline. In 2016, gas prices averaged $2.13 per gallon. At the end of 2018, gas prices surged to $2.73 per gallon (Brown, 2019). These increases in the prices of consumable products means the United States is continually becoming more expensive to live in. This exacerbates the existing housing affordability issue, as individuals are having to allocate more money and resources towards everyday goods, leaving less money to afford housing.

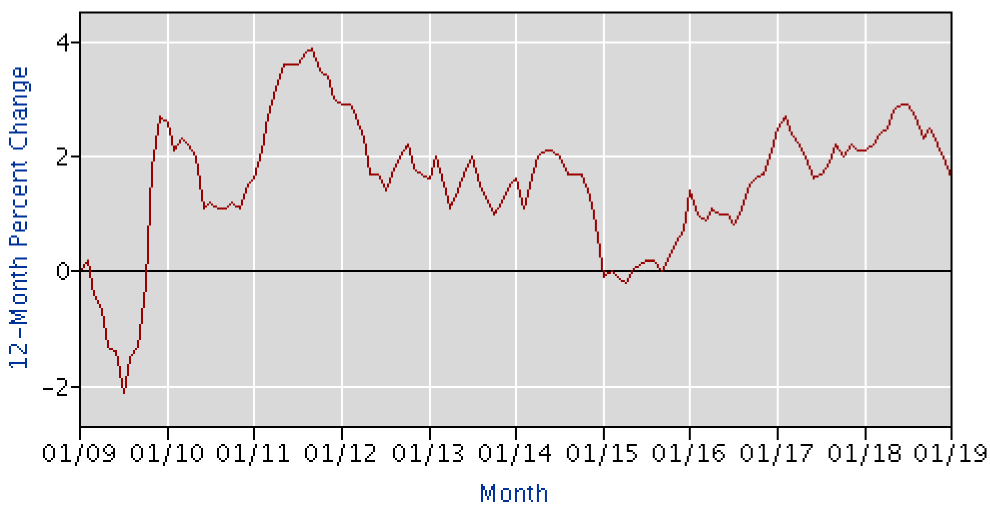

Figure 2: US Consumer Price Index 2009-2019 (Consumer Price Index, 2018)

The growing disparity between the price of housing and household income can be rooted to federal policy created in the mid-to-late 1980s, limiting the available homeownership opportunities for the population of low-to-moderate income citizens. This federal policy has much to do with the aforementioned trends of affordable housing loss, as well as housing opportunities for those of low to moderately low income ranges.

Appendix C.1.2: Federal Policy Affecting Low-Income Housing

As is stated in the Joint Center for Housing Studies at Harvard University, “increases in federal rental assistance have lagged far behind growth in the number of renters with very low incomes” (JCHS, 2018). In fact, federal policy has moved towards privatization of affordable housing through programs like Section 8 vouchers and community block grant funding. Section 8 vouchers are a way for the Federal Government to provide housing assistance through the distribution of rent vouchers to low income families so they can afford a rental unit through the private market (Housing Choice Vouchers Fact Sheet, n.d.). Community Development Block Grants are funds given to states and local communities to meet a broad range of development needs (Community Development Block Grant Program - CDBG, n.d.). Although research shows the largest issue plaguing first-time home buyers is down payments, only 50,000 households each year are aided with federal down payment assistance (JCHS, 2018).

The decline of housing affordability and government responsibility in providing for affordable housing needs can be traced back to the policies of the Ronald Reagan presidential administration (Moore & Hoban-Moore, 1990). In the late 1980s, homeownership was on a steady decline. While homelessness among the young population increased, rental housing stock declined so much that, “a majority of America’s 30 million tenant households lived in dwelling units acknowledged to be inadequate, substandard, over-crowded, or cost burdened” (Moore & Hoban-Moore, 1990). To further vex the issue, the Federal Government cut support for private housing subsidies, rehabilitation of public housing, and funds granted to local and state governments. The funding would have been used to give low-income families ownership opportunities, and give assistance to rehabilitate poor quality housing (Moore and Hoban-Moore, 1990). The number of low-to-moderate income families that would be eligible for housing aid per year was decreased, and rent prices were raised for tenants residing in federally-assisted housing. In 1970, low-cost rental units outnumbered low income renter households by 300,000: 6.5 million low cost rental units existed to house a population of 6.2 million low income renting households. After the shift in federal policy, these numbers transposed in 1985. The amount of low cost rentals fell to 5.6 million, while low-income renter households grew to 8.9 million, a shortage of 3.3 million units (Dreier, 2004). An example of federal policy removing support for housing affordability was the initiative to cut funding for the U.S. Department of Housing and Urban Development (HUD). In 1980, one year prior to Ronald Reagan's inauguration, funding levels for subsidized housing assistance reached $26.6 billion. By the time Reagan left office in 1989, that number was a mere $7.4 billion (Rubin, Wright, & Devine, 1992).

Today, the Federal Government still provides little assistance to low-to-moderate income families, as shown in Donald Trump's 2018 presidential budget where it is stated that: "[t]he budget devolves community and economic development activities to the State and local level, and redirects Federal resources to other activities" (America First, 2018). In 2018, the budget funding to HUD was cut by $6.2 billion (13.2% from 2017) (America First, 2018). These recent funding cuts to HUD include the elimination of funding for one of the longest standing programs of HUD, the Community Development Block Grant (CDBG). The CDBG provides grants to cities and communities to develop, "...decent housing and a suitable living environment...principally for low and moderate income persons" ("Community Development," n.d.). Beginning in fiscal year 2012 and extending through fiscal year 2016,the CDBG program used a total of $3.10 billion to invest in communities in each one of those years, and since 1974 has invested over a total of $144 billion in communities nationwide ("Community Development Block Grant Program," n.d. & Flores, 2017).

Distributed at both local and state levels, CDBG program funds are used for, "infrastructure, economic development projects, installation of public facilities, community centers, housing rehabilitation, public service...code enforcement, and homeowner assistance" ("Community Development," n.d.). The impact that the CDBG has had at the state and local level can be shown through the 28,000 people that the programs funds helped to find permanent employment for, and the resource support given to rehabilitate 95,000 homes and support public improvement projects that benefited an estimated 3.3 million residents across the nation since the CDBG founding (CDBG, n.d.). Due to the Trump Administration's actions in 2018 to eliminate direct federal funding to the CDBG, HUD now diverts their funding away from other programs to the CDBG in order to keep it functioning. Past and present federal policies have created a gap in the need distributed to lower income individuals in the housing sector of this nation, so much so that there is a rise in the need of nonprofits to fulfill the role in providing affordable housing to those of lower income ranges.

Appendix C.2: Nonprofits Addressing Affordable Housing Needs

The number of nonprofit and affordable housing organizations has grown significantly since the 1970s (Independent Sector, 2001, as cited in Saxton and Benson 2005). Over this period of time, state and local level public and private organizations have emerged as leaders within the affordable housing sector (Lecy & Van Holm, 2013). Local organizations operating within single states, and communities in cities like Worcester, are putting pressure on nonprofits that utilize funds received from donors, as there is more competition for the allocation of funds (Jang & Feiock, 2007).

Appendix C.2.1: Massachusetts State Organizations

The Massachusetts Department of Housing and Community Development (DHCD) “oversees funding and resources to help people in Massachusetts live affordably and safely” (“Housing and Community Development,” 2019). Some of the DHCD programs include the emergency housing assistance, home energy assistance, housing development, and rental assistance programs. The DHCD funds developers including nonprofits in their efforts to aid in housing affordability.

The Massachusetts Housing Partnership (MHP) is a public nonprofit that supports and finances affordable housing through community assistance and rental financing (Massachusetts Housing Partnership, 2019). The MHP works with the Department of Housing and Community Development to increase the amount of affordable homes in the state (MHP, n.d.).

Another state-level organization that addresses affordable housing is the Regional Housing Network of Massachusetts. Their mission is to “deliver progressive, affordable housing solutions, and education to families and individuals in every community throughout the state” (Welcome, n.d.). They currently have 9 nonprofit regional agencies across the state that assist in all types of housing issues (Welcome, n.d.).

The Massachusetts Association of Community Development Corporations is “dedicated to creating places of opportunity where all people can live with dignity while participating in and benefiting from our Commonwealth's economy” (“Overview,” 2019). The corporation also has their own affordable housing program which “assists families in acquiring and maintaining their own housing through homeownership education, home improvement lending, and foreclosure prevention," (Affordable Housing Program, 2019).

Community Development Corporations (CDCs) are a major type of housing assistance organization that operate at the local level. These CDCs serve to improve low-income neighborhoods where the population may be underserved, or where there has been "significant disinvestment" (Community Development Corporations (CDCs), 2014). State organizations including these CDCs, and the MHP, receive funds from both private and public donors. Funds are needed by these two organizations operating in Massachusetts to help them accomplish each of their mission and allow them to take action helping the affordability of housing. Since CDCs and the MHP are accompanied by numerous nonprofits attempting to alleviate housing affordability, appealing to funders is becoming more competitive.

Appendix C.2.2: Local Organizations

Local to Worcester, there are at least 5 Community Development Corporations: Main South, Worcester East Side, Oak Hill, The Worcester Common Ground, and The Worcester Community Housing Resources. The Worcester Common Ground was "founded in 1988 in response to concern about absentee ownership of land and property, the high cost of housing, the displacement of families from their homes into shelters, and the fading dream of home ownership and economic opportunity for those living in the most underserved neighborhood of Central Worcester, Massachusetts" (Worcester Common Ground CDC, n.d.). The Worcester Common Ground CDC provides affordable rental housing for low-to-moderate income families, "own[ing] and manag[ing] 70 affordable rental units" and 66 tax-credit funded rental units throughout the city of Worcester. They also provide affordable housing units that are sold to first time homeowners.

The Worcester Community Housing Resources (WCHR) is another local CDC that "works with private and public partners to develop both home ownership and rental housing in key neighborhood locations" (Development, 2019). The WCHR mainly serves to financially assist low-to-moderate income families in the purchasing process of a house through money lending at favorable pricing. They also provide rental housing at an affordable price point. Unique to other affordable housing nonprofits and CDCs, they own an assisted living home called the Heywood Wakefield Commons (Assisted Living, 2019). Built using a HUD grant, as well as “assistance from the Massachusetts Department of Housing and Community Development,” the assisted living facility provides “100% affordable assisted living for seniors lacking the resources needed in many such communities” (“Assisted Living”, 2019)

A local housing assistance-based nonprofit which has existed in Worcester for over 30 years is Habitat for Humanity MetroWest/Greater Worcester. They build and sell homes far below market values to low-to-moderate income families in Middlesex and Worcester counties. The mission of Habitat MW/GW is to: “build homes, communities and hope for local families and veterans,” (Habitat for Humanity MWGW, n.d.). Founded in 1985, they have built homes for families in 42 cities in central Massachusetts. They currently have 36 partner families living in homes and currently build about 4-5 homes a year with the fall of 2018 marking the 50th home built since their founding (McAllen, Sullivan, Casey, & Lucca, March 11, 2019).

Appendix C.2.3 Funding for Nonprofit Organizations

Most of the funding for local nonprofit organizations comes from donations from individuals and foundational funding, while the government plays a very small role (IUPUI Lilly Family School of Philanthropy, 2018). In receiving funding from the government, “concern is sometimes expressed that government funding detracts from nonprofit agencies’ distinctive niche within the service system, creates inappropriate accountability relationships, and results in loss of professional autonomy” (Jang & Feiock, 2007). Federal funding is frequently cited as an aid that nonprofit agencies shy away from when possible, as “dependence on government grants and contracts may undermine flexibility in specialized programming, because it rarely comes without mandates and strings attached” (Frumkin, 2002; Rushton & Brooks, 2007, as cited in Jang & Feiock, 2007). These reservations of the use of federal funding noted restrictions on how public funds can be utilized, along with the large amount of time and resources used through the process of complying with state and federal regulations (Krashinsky, 1990; Frumkin & Kim, 2002). This takes time and effort away from nonprofits’ missions: “Satisfying all of the requirements removes administrative staff from the core organizational mission of providing services to the public” (Frumkin and Kim 2002). The problems with federal funding manifest themselves in the typical sources of funding for nonprofits: In 2017, nonprofits relied on individual donations for almost 70% of their total revenue, and foundational funding for another 16% (IUPUI Lilly Family School of Philanthropy, 2018).

From the 1970s to the early 2000s, the number of US nonprofit organizations grew from 740,000 to 1.2 million (Independent Sector, 2001, as cited in Saxton and Benson 2005). More recent statistics show that 2.3 million nonprofits are operating within the US as of October 2013 and 50,000 new nonprofits were created in 2012 alone (Lecy & Van Hold, 2013). Figure 3 graphically shows growth of the number of nonprofits that exist to aid environment, education, religion, human services, and health services. Nonprofits that provide for housing affordability fall under the human services sector, which has grown 257% since 1989 (Lecy & Van Hold, 2013). In recent years, this sector growth and the importance of private funding has led private donors to increasingly stress that nonprofits show proof that their donations are being used effectively. With so many nonprofits currently operating in the US and their numbers growing, the allocation of funds available are becoming more and more competitive for nonprofits. Nonprofit organizations nationwide have been transitioning to traditional business models in hopes of easily being able to demonstrate success. It is obvious that the nonprofit sector has experienced immense growth this past decade, consequently it is becoming increasingly important for nonprofits to demonstrate they are successful in their missions to gain the most attraction to donors and therefore more resources.

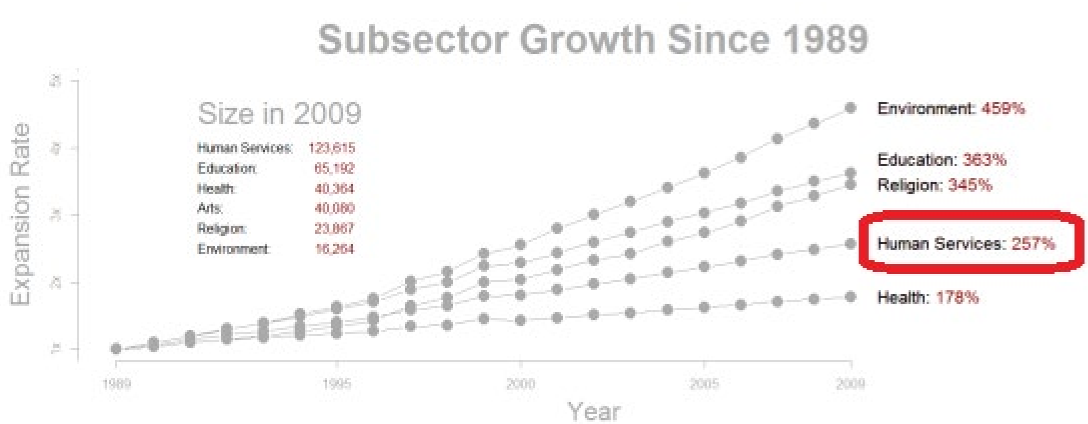

Figure 3: Growth of Human Service Orientated Nonprofits from 1989-2009 (Lecy & Van Holm, 2013)

Appendix C.3: Habitat for Humanity MetroWest/Greater Worcester

Habitat MW/GW builds home through donations and volunteer labor from local organizations, foundations and businesses (Habitat for Humanity MWGW, n.d.). Donations are crucial for Habitat because they receive zero governmental funding. The organization's success is crucial to get funding from donors. Knowing the organization and how they complete their mission is beneficial when designing a data collection tool to fulfill the likes of funders. (Carman & Fredericks, 2008).

Appendix C.3.1: Application Process

For a family to qualify for a home through Habitat for Humanity MetroWest/Greater Worcester, they must be first time home buyers whose annual income is between 30% and 60% of the Area Median Income Range for Middlesex or Worcester County, found in Figure 4. The next step in the application process is completing a homeownership interest form ("Homeownership," 2019). The Habitat for Humanity MetroWest/Greater Worcester team evaluates this form to decide if the family is eligible for application. If determined eligible for participation, the family completes the full homeownership application. Upon acceptance into the homeownership program, the family has to put in 400-500 "sweat equity" hours ("Homeownership," 2019). Sweat equity can be in the form of self-help or mutual help. "Self-help is labor contributed by the homeowner to build his/her own house. Mutual help is labor contributed by working in groups or alone on other people's houses, or as individuals working on one's own house" (Obeng-Odoom, 2009). After the period of sweat equity is complete, partner families are ready for their transition into becoming homeowners through Habitat MW/GW.

2018 30% - 60% AMI (Area Median Income)

	Worcester County	Middlesex County
Family Size	Income Range	Income Range
1	$18,050.00– $36,060.00	$22,650.00– $45,300.00
2	$20,600.00- $41,220.00	$25,900.00- $51,780.00
3	$23,200.00– $46,380.00	$29,150.00- $58,260.00
4	$25,750.00– $51,480.00	$32,350.00- $64,680.00
5	$27,850.00- $55,620.00	$34,950.00- $69,900.00
6	$29,900.00- $59,760.00	$37,550.00- $75,060.00
7	$31,950.00- $63,840.00	$40,150.00- $80,220.00
8	$34,000.00– $67,980.00	$42,750.00- $85,380.00

Figure 4: Area Median Income Needed to Apply for Habitat MW/GW ("Homeownership," n.d.)

Appendix C.3.2: Homeownership of Partner Families

Once a home is built and closed on, the partner families are officially homeowners and pay a 0% interest mortgage for their residence (“Homeownership,” 2019). Post-closing on a mortgage agreement, there is an extreme lack of communication regarding the progress of partner families who built a home with Habitat for Humanity MW/GW. (McAllen, et. al., 2019). Partner families are not required to have any contact with Habitat MW/GW post-closing. There is a large disconnect between the two parties, and an unsteady network of connection. The shortage of contact is due in part to non-response. Two out of the 36 partnered families responded to the yearly survey given in 2018 (McAllen, et. al., 2019). The low response rate makes it difficult to measure success within the organization. A solution would be to create a data collection tool that will effectively collect information on their partnered families lives.

Appendix C.4: Measuring Success in Nonprofits

As nonprofit organizations look to private fundraising, they are “increasingly being pressed to measure and report their outcomes regularly to funders and other constituents” (Morley, Vinson, & Hatry, 2001). Many large foundations are beginning to place stress on performance measurement, and are requiring nonprofit organizations they fund to report outcomes that prove their mission is working (Thompson, 2011; Van Slyke & Brooks, 2005). To ensure donors that their resources are being spent well, nonprofits can document information that can be synthesized as proof to support their missions (Morley, Vinson, & Hatry, 2001).

To aid in accomplishing this task, nonprofits have increasingly been turning to "traditional business models to improve their effectiveness and efficiency" (Sawhill & Williamson, 2001). The strategies in areas such as marketing, finance, strategic planning, information systems, and organizational development have proven useful in many non-profit organizations (Sawhill & Williamson, 2001 & Kaplan, 2001). However, one aspect of conventional business models that can't as easily be transferred to nonprofit use is success measurement (Sawhill & Williamson, 2001).

Appendix C.4.2: When is Success Measurement Important?

Warner Fletcher is an attorney based in Worcester, MA that has legal experience as a trustee for multiple charitable organizations and nonprofit organizations across the local region. (Fletcher Tilton Professionals n.d.). In his experience, success measurement is important to foundations when they are considering a grant request to an organization that they have not dealt with before (V. Lucca, personal communication, April 1, 2019). For example, in regards to Habitat for Humanity, a donor would want to know that owning a home has a benefit for families; Ex. Owning a home has allowed a family to start saving money for their children's college education. Success measurement is not as important when the donor has been dispersing grants to an organization consistently over time. In this case, the donor would typically consider the specific reason for a funding request, which could be something like day-to-day operations such as payroll of the organization, or specific items such as a new vehicle for the organization (V. Lucca, personal communication, April 1, 2019).

Effective outcome measurement (measuring success) also "enables program managers to have a running score of how their programs are doing and how to identify areas where attention is needed" (Morley, Vinson, & Hatry, 2001). These benefits, combined with the increased need to demonstrate success to funders, has led to a search for ways to demonstrate success. To accomplish this, many nonprofits are beginning to look to data collection tools to convey their success (Carman & Fredericks 2008)

Appendix C.4.3: Measuring Success for Nonprofits

In a standard private business, measuring success can be "as simple as reading a profit and loss statement" (Sawhill & Williamson, 2001). For a nonprofit, measuring success is much different. At its core, their mission is to help people achieve greater overall success in their life through the benefits of affordable homeownership. For an abstract notion such as this, with broad areas such as "overall success," as well as the term "help" being general, it is challenging to meaningfully measure and assess the contribution Habitat has had in people's lives (Sawhill & Williamson, 2001).

The concept of effective success measurement is new to many nonprofit organizations (Sawhill & Williamson, 2001). Nonprofit organizations are more often familiar with monitoring and reporting such information as the number of clients served, volunteer hours done in the organization, or the amount of donations received (Morley, Vinson, & Hatry, 2001). These are all important metrics, but they do not help the nonprofit organization understand how well they are helping their clients. Instead, they simply provide administrative information about the program in question (Morley, Vinson, & Hatry, 2001).

The issues organizations experience with measuring their success is a difficulty of unfamiliarity with the concept: "Most organizations performing outcome measurement are just beginning to become comfortable with it" (Morley, Vinson, & Hatry, 2001). Although difficult, measuring the success of a nonprofit organization can appeal to funders. Success within an organization can give a sense of satisfaction and purpose to funders (Berman, 2015).

Appendix C.5: Data Collection with Surveys and Google Forms

Once an organization decides to collect data that will measure their success, they must take a course of action. Data must first be collected before being able to make conclusions about the success of an organization, meaning a tool/system to collect valuable data must be established. The collection method of interest is surveying, as it is an effective way to collect qualitative and quantitative data (Johnson & Turner, 2003). The structure and questions asked are crucial for getting important data that can be given to funders.

Appendix C.5.1: Surveying and Response Rates

When collecting data, surveys are a great tool to use. Defining how data needs to be collected is important because, "sometimes, conducting a survey is the only available option for acquiring the data necessary to answer an important research question" (Doyle, n.d.). A survey has the capability of determining if a relationship exists or does not exist between multiple variables (Doyle, n.d.), and therefore can be used to answer the questions of if a nonprofit succeeds in accomplishing its goals.

Surveying has evolved since the development of computers. Today, surveys are commonly administered online. Advantages of online surveying include: "facilitative interaction between survey authors and respondents, collapsed geographic boundaries, user convenience, and arguably more candid and extensive response quality" (Smith 1997). Also, because of technology's ability to instantly send and receive a survey unlike those that are sent via postage mail, respondents are given a greater amount of time to respond. By increasing the time a respondent has to answer a survey and by allowing them to complete a survey at a more relaxed pace decreases the amount of non-responses from respondents (Halloway, 2012).

Another way to avoid non-response is to survey with incentives. Adding a monetary incentive to taking a survey greatly increases survey response rates: "a longitudinal study of young adults, parents receiving incentives of $1 or $2 were more likely than those receiving no incentives to provide addresses for their adult children, and children of parents receiving incentives responded more quickly to the survey" (Singer, 2013). Evidently, even the smallest incentive given to those being questioned have great results. Incentives are more likely than not to motivate those less compelled to complete a survey, reducing non-response bias (Peytchev, 2013).

The type of data that surveys rely on is "self-reported data". This means they are dependent on participants "truthfully and accurately" reporting their own personal attitudes, characteristics, and experiences (Doyle, n.d.). Surveys also have the potential of representing the opinions and judgements of an entire population of people, if administered correctly. Survey data is great for informative decision making, yet does not substitute for judgment and analysis. Surveying an entire population is ideal for researchers, yet nearly never practical. Professor James Doyle of Worcester Polytechnic Institute tells us that, "if chosen wisely, a relatively small sample or subset of a population can yield highly accurate predictions," further stating, "limited resources are best spent not by trying to survey everyone but by pursuing other goals such as obtaining a high response rate" (Doyle, n.d.).

Appendix C.5.2: Survey Design

When designing a survey that will eventually be administered to research subjects, the design of the questionnaire must be strategically crafted. Designing a user-friendly survey with electronic media can be accomplished by not listing too many questions per screen, eliminating unnecessary questions, and using graphics sparingly (Schonlau, Fricker, and Elliot, 2002). A predefined response is helpful in receiving consistent data that can be organized easily once collected. If using photos, a respondent is prone to answer the question in the context of the photo; photos can be beneficial alongside a question, but "unnecessary graphics should be avoided" (Schonlau, Fricker, and Elliot, 2002).

Appendix C.5.3 Survey Question Construction

When surveying, the way a question is constructed can have a large impact on the answer given by a survey respondent. A good question will provide answer with meaningful information (Fowler, 1995). Also, the time period of a question, the specificity of a question, and the way a potential answer could be displayed all can affect the answer of a survey question, given the same question intent (Converse & Presser, 1986). One of the most difficult instances for a surveyor to properly receive viable, accurate answers is when survey respondents are asked to recall events, feelings, and thoughts (Converse & Presser, 1986). Questions asking for a respondents recollection of events can particularly be challenging if the respondent participated in the events almost mindlessly in the first place, if the event was not impactful enough to leave a lasting impression within the respondents, and if the event occurred long ago (Converse & Presser, 1986). Respondents of a survey can be sensitive to what a particular question is asking, as well as the words that are used in the question. Because of this, the wording of similar preceding questions will alter a question that comes after. The surveyor needs to display care in the way that survey questions of similar topics are asked consecutively, as respondents are more likely to bring similar answers to these consecutive questions, thus altering accuracy and skewing true respondent feelings (Converse & Presser 1986).

Wording of a survey question is especially important when constructing a survey. Depending on the wordage used, surveyors might find skewed answers.When describing a question in a negative connotation, the respondent is likely to have strong negative feelings about the subject matter. This effect can be assumed, yet is unpredictable and could skew data. In contrast, if a question is written in a positive connotation, it is likely that the respondent's true personal opinion will be reflected (Converse & Presser, 1986). Appropriate wordage goes beyond connotations of a question. Increasing specificity of questions are increasingly important, as the more specific a question is, the more it helps respondents recall certain events and feelings. Using options and closed form questions are a good technique because they aid in jogging the memories of respondents

Appendix C.6 Manual Design

Adequate user manuals are incredibly important for creating a tool whose influence and effectiveness is long lasting. When presenting any sort of business tool to an organization, a guide on how to use the tool is imperative. The reader/ user of a manual must be fully equipped with information that will help them successfully use the tool (Hager, 1992).

The "how" and the "who" of a manual must be considered first and foremost before creation (Ferron, 1994). How the application will be used is a major consideration that the creator of the manual should keep in mind. An employee of the organization, present or future, must be able to take the manual and become a proficient user. Further, before writing the instructional manual, the expected knowledge/experience level of the reader must be factored in. This does not necessarily mean "dumbing" the manual down, but rather making it very legible and visually pleasing with step-by-step procedures (Hodgson, 2007). Logistical considerations must be made before actually creating the content in the manual. A lack of direction will leave a user within an organization lost and frustrated.

One of the most important features of a user manual is easily being able to find information. Users of manuals tend to grow frustrated when they cannot find answers in a given manual (Hodgson, 2007). A well organized information hierarchy in the table of contents can be of assistance. While your typical table of contents consists of what information lies on what page number, creating an information hierarchy of chronological use, frequency of use, functional categories, and expertise level is an additive resource. Keywords on different sections within a table of contents should be easily identified by not just the creators, but by an employee in the organization. The use of color coded navigation will be visually pleasing and informative in locating sections. If there are uncommon technical terms, a glossary may be added at the end of the manual, as well as an index that includes synonyms. A section on troubleshooting can also save a user tedious time of searching through a large manual (Hodgson, 2007).

When the creator(s) of the applications leave the organization with a new tool, any and all potential questions must be answered in a manual. A structure and modular approach in the manual-writing process allows success against fundamental usability criteria such as suitability, accessibility, readability, and maintainability (Hager, 1992). Properly structuring a manual allows readers to learn what they need to know and when they need to know it. User manuals should not be assumed as a long piece of literary work, but as a device that is an important component to the overall system (Morris, 1986). Manuals must be well constructed, specific, and tested for success (Morris, 1986).

Appendix D: Methodology

Appendix D.1: Our Goal

The goal of this project was to develop a data collection system for Habitat for Humanity MetroWest/Greater Worcester. In this project, we administered the survey that we created to current homeowners and created the survey process that will be used the future. In this chapter, we discuss the three objectives the team followed to achieve our goal, and ethical considerations we had to account for along the way.

Appendix D.2: Objectives

Appendix D.2.1: Objective 1: *Develop a data collection tool for tracking partner families*

We developed a data collection tool that captures data from families and organizes it in a database. Based upon our background research, we decided to use a survey containing both closed and open ended questions. This incorporated both quantitative and qualitative data collection concurrently, allowing Habitat MW/GW to collect stories and numerical data from their families.

Prior to our project, Habitat MW/GW collected partner family data only before homeownership, and during the homebuilding process. Potential applicants are required to fill out a pre-qualification form in which they are asked questions pertaining to income, outstanding collections, and household expenses. (Anonymous, 2017). If a family qualifies for homeownership based upon the pre-questionnaire, they are allowed to fill out the full homeownership application. This application asks more specific questions, such as individual monthly income and an itemized breakdown of monthly expenses. Families are also asked for monetary assets, physical assets, and overall debt (Anonymous, 2017). We used questions on the previously mentioned homeownership applications as a guideline for our own survey questions. This gave us a strong idea of what data Habitat MW/GW wished to collect from partner families after they became homeowners. To gather a more complete idea of what data Habitat MW/GW wanted to include in our data collection system, the team met with Habitat for Humanity Family Services Coordinator, Tanya Clark; the Volunteer Coordinator, Molly Pietrantonio; and the

Development and Grants Officer, Sara Costello. We discussed the types of family stories and data that Habitat wanted specifically for family services and grant writing. With this new information, the team drafted 6 surveys: One survey to be administered during IQP that would gather baseline data, a survey to be administered immediately after a family buys their home, and then at 1 year, 3 year, and 5 year intervals after this. Each survey would have asked similar types of questions, but would have been tailored to the specific time interval it was administered at. This survey structure was meant to perform a longitudinal study of their partner families. For more on longitudinal studies, see Appendix F.

During our second week sponsor meeting, Habitat MW/GW requested that we make our survey totally anonymous. Due to the anonymity of the survey, we would not have been able to easily track singular families in a longitudinal study. To account for this change, the team separated the original survey information into 4 different survey deliverables: One strictly for gathering communication info and dispersing educational information to families, one for data collection during our project which was called the "Foundations Survey", one for data collection in the future, and one to be given post-mortgage payoff. Both the post mortgage survey and the communication information survey are not anonymous. They exist to update contact information of partner families, extend informational resources to them, and gauge their interest in Habitat programs. The data collection survey was to be given during IQP, and every 3 years moving forward. The team then iterated through multiple rounds of drafting survey questions, meeting with Habitat twice a week during weeks 2 and 3 of the project to make revisions. The final edits to our data collection survey were completed for the 4th week meeting with Habitat MW/GW.

To choose an electronic implementation of our data collection tool, our team met with Tanya Clark, Molly Pietrantonio, and Sara Costello. We compared the pros and cons of 3 different online surveying tools: Google Forms, Microsoft Office 365 Forms, and SurveyMonkey. We decided to use Google Forms, and associated Google Sheets for the online surveying method and storage database. We chose Google Forms due to cloud availability, the fact that it is free, and for the user friendly data analysis options that come along with it. Upon selection of Google Forms, the team implemented the finalized survey questions in Google Forms. We utilized the different question types available when constructing our survey for ease of data analysis. We also formatted the response spreadsheet within Google Sheets so that data is presented in a more user-friendly manner. The final surveys can be found in Appendix K, L, and M, respectively.

To maximize our survey outreach, our survey administration methods had to be able to accommodate families with different resource availability. Namely, Habitat MW/GW has six families who do not use email. An email-only survey would have left out these six homeowners, so we chose to use a hard copy of our survey distributed through the mail to these six families.

Appendix D.2.2: Objective 2: *Pilot new data collection tool*

We used our tool to collect data from the 36 present Habitat for Humanity MetroWest/Greater Worcester partner families; our response rate goal was 50% of the 36 families. During the first week of our project, we presented our sponsor with a plan of monetary incentivization for respondents. At first, our incentive options included cheap gift cards to popular retailers. After a meeting with Molly Pietrantonio and Tanya Clark, our incentivization plan was chosen to be 25% off a single ReStore purchase in the form of a coupon. The coupon was attached at the end of the online survey. For the six partner families that we mailed a copy of our survey, the ReStore coupon was printed on the last page of the survey. For more information about ReStore, see Appendix E

Once our survey materials were finalized, we began with an initial phone call to alert each family that the surveys would be sent via email (or mail for the six non-email families). We told partner families that we would be sending out our Foundations Survey, and briefly explained to the partner family about the motivation that prompted Habitat for Humanity MetroWest/Greater Worcester to approach our university with the project. We also mentioned the 25% off ReStore coupon they would receive if the survey was completed. A script of the initial phone call can be found in Appendix I.

After calling the families, we emailed and mailed the survey to everyone the following day, Wednesday, April 3rd, 2019. The deadline to receive the ReStore coupon for the completion of our Foundations Survey was set a week and a half after it was sent, April 14th, 2019. We sent the survey link out to the Habitat families again on Tuesday, April 9th with a reminder to complete the survey. On Friday of that week, we sent the survey to families again, notifying them that the weekend would be their last opportunity to complete the survey and receive the incentive. On Monday, April 15th, we called the families anonymously to notify them that the period to complete the survey and receive the incentive had been extended to Wednesday, April 17th. We asked them whether or not they had already completed the survey; If they had not, we asked that they complete it before Wednesday. If they had already taken the survey, we asked that they shared their thoughts and recommendations on the administration of the survey. These recommendations were later considered when creating the survey administration protocol that Habitat MW/GW would use in the future. A script of the follow-up phone call can be found in Appendix J.

Appendix D.2.3: Objective 3: ***Create a user manual for Habitat for Humanity's future use or modification of the data collection system***

The user manual delivered in conjunction with the Google Form survey and Google Sheet spreadsheet was made to ensure that Habitat for Humanity MW/GW will be able to effectively use the data collection system we created in the future to its fullest extent.

We organized the manual in the order in which you use each feature of Google Forms, eg. signing in to Google, finding the Google forms, etc. We set up a table of contents that illustrates this organization, and also created a separate 'frequency of use' table that starts with the most frequently used steps in our experience, and descends in order of frequency. Our manual consists of 23 sections totaling 63 pages which illustrate how to utilize all of the necessary features within both Google Forms and Google Sheets.

In the manual, we followed a simple design that involves largely pictures containing arrows and boxes that illustrate the proper buttons to click, and the areas of focus for each step in the manual. These pictures focus on the area of the page in question, with enough context to know where on the page to look. Small, simply worded paragraphs are used to explain more intricate parts of our survey tool, such as conditional formatting. To make sure that the manual we created was clear, we asked two people who were not affiliated with our project in any way test the manual: A native Spanish speaker, and an acquaintance of the project team. We used their feedback to then make revisions. Upon final revisions, the team trained both Tanya Clark and Sara Costello of Habitat MW/GW in the use of our data collection system, and had them read through and test our manual to make sure that they understood each step of using the tool. Finally, we delivered Habitat MW/GW two physical copies and an electronic version of the manual for their use beyond our project. The electronic version was kept on their office share-drive and was made editable in the event that they need to make any future modifications.

Appendix D.5: Ethical Considerations

When crafting our survey questions and survey protocol, the team ran into one main ethical issue that needed to be handled: Anonymity of our data collection survey. Originally, our surveys were not going to be anonymous, and were crafted so that Habitat could track a family's progress over time in a longitudinal study. Surveys would have been administered at different times based on when a family had become a homeowner, and Habitat would have been able to track these surveys in a database. However, a discussion with the team's advisors and sponsors resulted in transitioning to an anonymous survey, rather than a confidential one. This decision was made because not all of the parties involved were comfortable with one person at Habitat holding identifiable, potentially sensitive family data over time. Additionally, it was voiced that an anonymous survey could potentially lead to more truthful information being reported by homeowners because the homeowner does not have to worry about repercussions that may extend from responses they may provide to their home mortgage provider.

We researched keeping our longitudinal study-style survey anonymous through the use of self-generated ID codes that a homeowner would create for themselves, and would remember from survey to survey. This would allow for the tracking of family data over time, but would remove any identifying information about the partner family. For more on these codes, see Appendix F. In the end, it was determined that the challenges that are inherent with ID codes (Homeowners forgetting them, a different member of the family responding from survey to survey), and Habitat's needs in data collection did not warrant the use of an anonymous longitudinal study. Therefore, we used a totally anonymous survey for data collection that is able to collect aggregate data, as well as anecdotes the respondent families provide.

To meet Habitat MW/GW's family services needs with the new, anonymous survey, we created additional informational surveys that had no risk accompanied with them. These surveys did not contain potentially sensitive information, and therefore did not have to be anonymous.

We also submitted our methodology and sample questions to the Worcester Polytechnic Institute *Institutional Review Board* (IRB) that reviewed our materials in order to ensure proper procedures were followed.

Appendix E: Habitat for Humanity Restore

ReStore is a home furnishing retail store that is owned and operated by Habitat MW/GW. They sell new or lightly used furnishings donated by the public for prices far below retail value (ReStore, n.d.). Partner families automatically are given a 10% discount at ReStore regardless, and this 25% coupon adds to that initial 10%

Appendix F: Anonymous Longitudinal Studies

A longitudinal study is a type of research designed to track specific variables over a long period of time with repeated observations. Typical longitudinal studies rely on knowledge of who the respondents are in order to establish baselines to track answers over time (Shadish, Cook, & Campbell, 2002). Performing a longitudinal study in an anonymous survey format is challenging yet rewarding. Respondents usually give more accurate, less self-protective answers when anonymity is guaranteed. A major challenge is relying on the respondents to trust the organization distributing the anonymous surveys (Kearney, Hopkins, Mauss, & Weisheit, 1984). Because longitudinal studies are meant to withstand the test of time, how a survey is maintained or modified to continue its relevance is in the hands of the organization. Thus, training, along with regular communication on the organizations end, becomes vital to the longitudinal survey (Caruana, Roman, Hernandez-Sanchez, & Solli, 2015).

A solution to track anonymous respondents over time is assigning a self-generated identification code. The code is chosen independently by each respondent and written at the beginning of every survey (Kearney et al., 1984). Codes can be a combination of numbers and letters, or short answers exclusive to a respondent. One example is asking a respondent to create a code that that is mostly likely specific to them and only them. For instance, a code that consists of the first 2 initials of your mother's name, the number of your birthday, and the first two initials of your hometown. A person whose mothers name is Christine, birthday is May 15, and hometown is Waterbury, CT, he or she's self-generated code would be ch15wa. Drawbacks to this code system include respondents forgetting their code after they made it, the chance of respondents having the same code, or respondents remembering the wrong code.

Appendix G: Purpose of a Database

Once data is collected from a survey, it needs to be stored. Databases help provide data independence, data sharing, security, and data integrity (Blagsen, 1982). A well-designed database "makes it possible to define an integrated view of relevant data for all applications" (Batini, 1986). Databases are most effective at storing data and have "the ability to sort the information in various ways" (Van Horn, 2008). Furthermore, the purpose of a database system can be described as, "oriented toward the modification and retrieval of formatted data -- the kind of data associated with the management of inventories, accounts payable and receivable, personnel information, and other administrative applications" (Blagsen, 1982). Managing a large amount of data is necessary, but can be very tedious. The tool of a database also helps a researcher analyze their data more efficiently: "Web-based reports are much easier to complete when data is in a database" (Topp, 2002).

After the data was collected from a survey, it used to be "electronically pasted into a database or spreadsheet for analysis" (Topp, 2002). Third party software makes the process of electronically inputting data more efficient by "automatically transfer[ing] data from Web forms directly into a database" (Topp, 2002). The utilization of a comprehensive database helps save a step in the process of inputting answers, while offering an organized platform to synthesize recorded data. An example of a survey and database synthesizing respondent data together is Google Forms and Google Sheets. *Using Google Forms to Collect and Analyze Data* tells us: "Google Forms allows us to compose questions, collect answers from respondents, and present data in spreadsheet format so that students can track and analyze the data using Google Sheets" (Hsu and Wang, 2017).

Appendix H: Database Synthesis

How a database is designed is important for the client, as it needs to properly address their needs. Database design is described as: "Designing the structure of a database in a given environment of users and applications such that all users' data requirements and all applications' process requirements are 'best satisfied'" (Batini, 1986). Commonly, database design is split into three different phases: requirements specification, or planning; conceptual design, or simply design; and physical implementation (Smith & Smith, 1978).

Requirements specification focuses on identifying the information a given data collector is looking for. This ensures that irrelevant data is not inputted into the system. The database must be specific, preferably with sets of rules set in place before the creation takes place (Storey & Goldstein, 1993). In specifying requirements, “any structured collection of variables that are appropriately formatted to support both data entry and retrieval” can optimize organization of data within a database (Tseng & Mannino, 1989). The production of requirement specifications must be a joint effort between team members: “The elicitation of requirements is a collaborative effort among managers, users, and system analysts” (Liou and Chen, 1993)). Liou and Chen go on to discuss misunderstandings in system development. They state: “One of the major factors that causes misunderstandings in the systems development process is the complexity of the communication and decision making among members of a project team” (Liou and Chen, 1993).

The conceptual design phase of database design is “the integration of all the concepts which are necessary to support the various application views” (Smith & Smith, 1978). This design phase will define how the concepts within the data collected are related and not contain any implementation detail (Smith & Smith, 1978). A fundamental premise of the conceptual design phase of database design is abstraction. Abstractions are “the means by which human beings understand and manipulate complex systems” (Smith & Smith, 1978). Database design primarily deals with abstract objects, rather than abstract operations. These objects are categorized in 2 ways: Generalizations and aggregations (Smith & Smith, 1978). The abstractions formed are used to create hierarchies and establish relationships among data, such that formatting data in the implementation of the database is simpler. For more on database design, reference Appendix C.

Physical implementation of database design is motivated by the demands of data volume and the ability to access cells of data in the most efficient way possible. As Lightstone, Teorey, and Nadeau state, “a database with a few rows of data really has no issues with physical database design, and the performance of applications that access a tiny database cannot be deeply affected by the physical design of the underlying system” (2010). The goal of implementation of a database is to maximize its performance in querying data. This performance of the physical database can be “measured by the time delays to answer a query or complete an update for an individual application, and also by the throughput…in a specified unit of time” (Lightstone, Teorey, & Nadeau, 2010). Highly efficient physical database design uses indexes in order to retrieve information from tables created to house data. These indexes optimize the data available at the hands of the user and streamline data recall to access data faster. There are three techniques used in physical database design: data compression, data striping, and mirroring. In data compression, data is fit into a smaller retrievable area thereby allowing users to access data faster. Data striping is the distributing of data over multiple areas based on relevancy to the rest of the data, and acts as a grouping mechanism for similar sets of data. Finally, mirroring is another technique used to improve database reliability where data is duplicated on multiple disks within a network. Even though data is kept safe through multiple copies, it requires extra storage space present (Lightstone, Teorey & Nadeau, 2010).

Appendix I: Initial Phone Call Script

Hello my name is _______ and I am calling on behalf of my Worcester Polytechnic Institute project team working with Habitat for Humanity MetroWest/Greater Worcester. You should have received an email a few weeks ago from Habitat that had an introduction of my teammates and myself. This phone call is just a heads up that the survey is being sent out tomorrow, and if you answer by April 14th, you will receive a 25% ReStore gift card on your next purchase at either Ashland or Worcester Restore locations. If you have any questions please let Habitat know. Thank you and have a great day.

Appendix J: Final Phone Call Script

Hello my name is _______ and I am calling anonymously on behalf of Habitat for Humanity MetroWest/Greater Worcester. This phone call is just to let you know that the period to answer our survey and receive the ReStore 25% off coupon has been extended to Wednesday, April 17th. Have you taken our survey?

If yes:

That is great! Do you have a few minutes to answer some questions about it?

If yes:

Thank you so much! First question is:

- Did you think that Google Forms was a good way to do it?
- Did we give you enough time to answer?
- What would you have done differently?

If no:

Okay, have a great day and thank you for answering our survey!

If no to having done survey:

No problem, if you have time we would really appreciate an answer to our survey by Wednesday. Thank you and have a great day!

Appendix K: Foundations Survey

In order to better help partner families in the future, we would be pleased if you would provide us with feedback on the process of becoming and being a homeowner.

While this survey is optional, any input coming from our families is greatly appreciated and treated with the utmost confidentiality and respect. The survey will remain **completely anonymous**.

This survey consists of 5 sections totaling 30 questions. As an incentive to complete this, and future surveys, **we will be offering ReStore coupons for an added 25% off of your next purchase, in addition to the 10% discount you already receive. You will only receive this incentive if your response is received by XX/XX/2022**

1. When did your family move into your home? If you answer B, C, D, or E please skip to the Family and Education Section

A. Within the last 3 years
B. 3-6 years ago
C. 7-10 years ago
D. 11-14 years ago
E. 15+ years ago

Application & Homebuilding Experience:

For us to better understand our families' journey prior to becoming a homeowner, and to understand how we can improve our processes, please answer the questions below to the best of your ability.

2. Please describe how Habitat informed you that you were selected for the opportunity to become a homeowner.

3. Please describe your family's experience of the selection and homebuilding/sweat equity process.

4. The **Habitat Homeownership Info Sessions** prepared me well for becoming a homeowner.

Strongly Disagree		Neutral		Strongly Agree	N/A
○	○	○	○	○	○
1	2	3	4	5	6

5. The **Homeownership Application Process** prepared me well for becoming a homeowner.

Strongly Disagree		Neutral		Strongly Agree	N/A
1	2	3	4	5	6

6. The **Homeowner Partnership Agreement** prepared me well for becoming a homeowner.

Strongly Disagree		Neutral		Strongly Agree	N/A
1	2	3	4	5	6

Habitat's Support System:

Answering the questions below to the best of your ability will help us understand what we can improve upon in our support system prior to becoming a homeowner, during the homebuilding experience, and after becoming a homeowner. To help us help you, please indicate the extent to which you agree/disagree with the following statements.

7. Habitat clearly communicated the expectations and full extent to which I would be involved in the process of building my home.

Strongly Disagree		Neutral		Strongly Agree	N/A
1	2	3	4	5	6

8. What changes do you think we could make to our communication during this process?

9. Habitat offered the necessary support for me and my family through the homeownership process.

Strongly Disagree		Neutral		Strongly Agree	N/A
1	2	3	4	5	6

10. How can we improve our support system?

____

____

____

11. Habitat offered me enough informational resources prior to becoming a homeowner.

Strongly Disagree		Neutral		Strongly Agree	N/A
1	2	3	4	5	6

12. It was helpful to have a mentor family during the homeownership process.

Strongly Disagree		Neutral		Strongly Agree	N/A
1	2	3	4	5	6

Family and Education:

The following section asks various questions on your children's lives and their educational level. Your answers help inform us how our Habitat families are growing and improving.

13. How many children did you have when you applied to be a homeowner?_________

14. What is the highest grade level completed by your child(ren)? (Please fill in the blank with the appropriate grade level, eg: Kindergarten, 7th grade, High School Graduate, etc.)

Child 1	Child 2	Child 3
______________	______________	______________

Child 4	Child 5	Child 6
______________	______________	______________

15. My children's overall performance in school has improved since becoming a homeowner.

Strongly Disagree		Neutral		Strongly Agree	N/A
○ 1	○ 2	○ 3	○ 4	○ 5	○ 6

16. Please describe how your child(ren)'s performance in school has changed overall.

____

____

____

____

____

____

____

17. Since becoming a homeowner, have you furthered your education? **Yes / No**

If yes, to what degree? ____

Quality of Life:

The following section asks questions about how your family's life has changed since becoming a homeowner. Please indicate the extent to which you agree/disagree with the following statements and elaborate on the open ended questions.

18. My life has become less stressful since becoming a homeowner.

Strongly Disagree		Neutral		Strongly Agree	N/A
1	2	3	4	5	6

19. Please describe how becoming a homeowner has changed your daily stress levels.

20. My family's overall well-being has improved since becoming a homeowner.

Strongly Disagree		Neutral		Strongly Agree	N/A
1	2	3	4	5	6

21. Please describe your family's overall well-being since becoming a homeowner through Habitat.

22. My experience as a homeowner has allowed me and my family to become more involved in the community.

Strongly Disagree		Neutral		Strongly Agree	N/A
1	2	3	4	5	6

23. I feel a sense of pride in owning my home.

Strongly Disagree		Neutral		Strongly Agree	N/A
○	○	○	○	○	○
1	2	3	4	5	6

24. Please describe your sense of pride in owning your home.

____

____

____

Employment, Finances & Income:

This section focuses on improvements made by families in the areas of employment, finances and income since becoming a Habitat partner family.

25. Are you currently employed? **Yes / No**

26. Mark the box that describes your change in household income since becoming a homeowner

- ▢ Increased
- ▢ Generally remained the same
- ▢ Decreased

27. I expected my housing related expenses to increase as a homeowner.

Strongly Disagree		Neutral		Strongly Agree	N/A
○	○	○	○	○	○
1	2	3	4	5	6

28. Did you have unexpected expenses? If so, please identify them.

____

____

29. Being a homeowner has allowed me to better financially plan for my family's future.

Strongly Disagree		Neutral		Strongly Agree	N/A
1	2	3	4	5	6

30. Since becoming a homeowner, my financial situation has improved.

Strongly Disagree		Neutral		Strongly Agree	N/A
1	2	3	4	5	6

Thank you for taking the time to respond to our Homeownership Survey! We really appreciate your feedback, and would like to receive your responses in the mail as soon as possible using the return envelope provided.

_ _

25% off ReStore Coupon

Valid only at the Worcester and Ashland ReStores.

Valid from XX/XX/XX - XX/XX/XX only.

Some exclusions apply, including but not limited to ReColor paint, MaxLite and GreenLite product, and ReStore soda and other ReStore product.

Appendix L: Communication and Information Survey

Greetings Habitat Partner Family! Here at Habitat for Humanity MetroWest/Greater Worcester, we would like to stay in touch with you so that we can maintain healthy relationships with our partner families. We would appreciate you taking this **quick, optional survey** so that we can update our contact information, and disperse educational information to you.

COMMUNICATION

1. Who is the best contact person in your family?

Name:____________________

Primary Phone Number:________________

E-mail:____________________

2. What is the best way to contact you in the future? (Please Select One or More)

Phone Call ▢

Email ▢

Mail ▢

3. Please check one or more appropriate boxes.

▢ I would not like to communicate with Habitat other than to pay my mortgage

▢ I would like to be contacted about volunteer opportunities

▢ I would like to remain on a Habitat for Humanity mailing/email list

▢ I would like to receive holiday party invitations

▢ Other: (Please Specify) ____

INFORMATIONAL RESOURCES:

4. Please check the appropriate box if you would like to receive informational resources on the topic.

▢ Resume writing

▢ Financial education/literacy

▢ Budgeting

▢ Credit counseling

▢ Tax support

▢ Weatherization of your home

▢ Energy efficiency of your home

▢ Will writing

▢ Habitat volunteer opportunities

▢ Habitat events

▢ Affordable healthcare options

▢ Other: (Please Specify)____

5. Are you interested in mentoring future Habitat for Humanity partner families?

▢ Yes

▢ No

▢ Maybe in the Future

Appendix M: Post Mortgage Survey

Congratulations on completing your homeownership journey with us at Habitat for Humanity!

You and your family are seasoned homeowner veterans with years of experience under your belts! We would love to learn about some experiences from your time as a Habitat for Humanity MetroWest/ Greater Worcester partner family. It would be greatly appreciated if you could fill out this questionnaire to the best of your ability.

Habitat for Humanity® MetroWest/ Greater Worcester

1. Who is the best contact person in your family?

Name:____________________

Primary Phone Number:________________

E-mail:____________________

2. What is the best way to contact you in the future? (Please Select One or More)

Phone Call ▢

Email ▢

Mail ▢

3. What was most memorable about being a partner family with Habitat for Humanity MetroWest/ Greater Worcester?

____

____

____

____

4. Habitat for Humanity MW/GW positively impacted my family's life

Strongly Disagree		Neutral		Strongly Agree	N/A
1	2	3	4	5	6

Please explain how Habitat for Humanity impacted your family's life.

5. Given your experience with Habitat, what would you like to see changed?

6. Please check the associated box if you are interested in learning more about the opportunity.

- ▢ Becoming a Habitat for Humanity board member
- ▢ Becoming a mentor for future Habitat for Humanity families
- ▢ Volunteer opportunities with Habitat for Humanity MW/G

Thank you for taking the time to respond to our Post Mortgage Survey! We really appreciate your feedback. As an incentive for completing this survey, we've included a 25% off ReStore Coupon below that can be cut out and used at ReStore in Worcester or Ashland on top of the 10% off already taken off for being a Habitat partner family.

_ _

25% off ReStore Coupon

Valid only at the Worcester and Ashland ReStores.

Valid from xx/xx/xx-xx/xx/xx only.

Some exclusions apply, including but not limited to ReColor paint, MaxLite and GreenLite product, and ReStore soda and other ReStore product.

Habitat for Humanity would like to thank you for your participation. We wish you the best in your future endeavors and hope you live happily in your home.

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