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FINAL REPORT

AFFIRMATIVE FAIR HOUSING
TECHNIQUES DEMONSTRATION

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CHAPTER I INTRODUCTION

Many organizations work with the Department of Housing and Urban Development (HUD) to implement fair housing programs and policies. In particular, the efforts of Private Fair Housing Groups (PFHGs) have been recognized as vital forces in assisting HUD, as well as state and local governments, to promote fair housing patterns and practices. PFHGs have exhibited a strong commitment to fair housing and sometimes can pursue avenues not open to public anti-discrimination agencies. PFHGs have identified and combatted discriminatory techniques that have escaped the attention of others--including the federal government.

To learn more about the effectiveness of various private fair housing activities, the Office of Policy Development and Research of the Department of Housing and Urban Development provided funds to nine groups to identify, develop, and demonstrate new and innovative ways to affirmatively promote fair housing practices. The report describes the nine demonstrations, summarizes findings and conclusions of the demonstrations, and presents recommendations for future implementation and replication of the types of activities carried out by the PFHGs. Comparisons are made between similar projects by grouping them according to their approaches and/or objectives. Major differences in approaches, outcomes and resource utilization also are discussed. This report can serve as a guide; it can be used by PFHGs contemplating the adoption of strategies similar to those for which HUD provided demonstration funds.

DEMONSTRATION APPROACH

In 1977, HUD contracted with Mark Battle Associates, Inc. (MBA) to conduct a project affirmatively promoting fair housing. MBA invited private fair housing groups (PFHGs) from all regions of the country to submit proposals for subcontracts to conduct demonstrations to develop, refine or test an affirmative fair housing technique. The groups were instructed to propose innovative methods to promote fair housing. This philosophy differed somewhat from the more traditional approach of combatting housing discrimination; a strategy tending to place PFHGs in an adversarial position with organizations and institutions perceived as perpetuating discriminatory patterns and practices. Therefore, the intent of the affirmative fair housing techniques demonstration was to provide funding for the investigation of new ways to make the "system" more responsive to the need for equal housing opportunity for all. Specifically, the demonstration was designed to identify and test the effectiveness of techniques that could be used by the selected PFHGs to promote fair housing in their communities, with the results of the demonstrations to be evaluated in light of their potential for more widespread implementation.

SELECTION OF PFHGs

Private fair housing groups were identified that met ten criteria specified by HUD. The most important of these requirements were that: (1) at least 50 percent of the organization's activities were directed toward fair housing; and (2) the groups were not to have been funded previously to conduct research projects for HUD. The

second criterion allowed selection of organizations that were representative of most PFHGs--small, understaffed and underfunded. Those organizations that were solicited for the demonstration fit the description of the "typical" private fair housing group.

A proposal competition was conducted among PFHGs solicited. The PFHGs described the projects they wished to conduct; selections were based on several factors, including:

- Importance of the need or problem being addressed to the promotion of equal housing opportunity
- Innovativeness of the approach to be demonstrated
- Potential replicability of the project's activities

Based on their proposal submissions, nine PFHGs were chosen as subcontractors. Each received approximately \$25,000 to implement their proposed demonstration.

SCOPE OF THE DEMONSTRATION

The 27-month period of the demonstration effort was divided into three phases: planning, implementation and evaluation.

Planning

Each project had a four-month start-up period during which proposals were refined, step-by-step work plans were developed, preliminary research was conducted and baseline data were collected. Certain activities necessary for project implementation were also conducted, e.g., development of advertising materials. MBA assisted in the

preparation of the work plans (including the establishment of measurable objectives) and ensured the timely initiation of project implementation. However, neither MBA nor HUD were involved in the implementation of the projects. The PFHGs received funding equivalent to grants, with the underlying purpose to ascertain how local groups would utilize their funds to affirmatively promote fair housing.

For 12 months the nine PFHGs conducted their demonstrations as specified in their work plans. The PFHGs carried out the designated activities, prepared and submitted to MBA interim documents, and collected data agreed upon with MBA. During this phase, MBA monitored the projects through on-site visits, review of monthly progress reports and periodic telephone conversations. At the end of the one-year period, each project submitted a final report on its activities and an assessment of demonstration value and impact.

Evaluation

After the 12-month implementation phase, MBA collected follow-up information and independently assessed the outcomes of the demonstrations. Case-study evaluation reports were prepared for each project, and a one-day seminar was held for demonstration participants where they shared their experiences and conclusions.

In assessing the demonstration projects, the following factors were examined:

- Performance--an assessment of achievement toward initially-determined demonstration objectives and the degree of adequacy of performance

- Process--a determination of whether the activities conducted by the projects were appropriate for successful accomplishment of objectives
- Resources--an assessment of the adequacy of amounts and types of resources applied to project efforts, including time, personnel, in-kind contributions and subcontract funds to achieve demonstration objectives, i.e., the cost-efficiency of the projects
- Replicability--an assessment of why a project will or will not work in other communities and identification of the contributing factors, i.e., setting, process, special barriers, facilitating factors

Information collected prior to start-up (baseline), during project implementation (ongoing) and after the projects had ended (follow-up) was used to evaluate the individual projects.

DEMONSTRATION OVERVIEW

The following descriptions serve as an overview to the more extensive case studies presented in the next section.

Housing Opportunities Made Equal (HOME) Buffalo, New York

HOME's project was designed to assess the feasibility and effects of marketing fair housing teaching modules to school systems in the Buffalo metropolitan area. Two modules were developed, one to be used at the elementary level and one at the secondary education level. The packages were field tested by project personnel in six elementary and seven secondary schools. This involved administering a test for retention of knowledge by the students and acquiring feedback from the teachers. Results of the field tests were used to help revise the modules, which were then tested in an additional ten elementary and seven secondary schools by teachers trained in the project. The modules were then refined for potential use in school systems nationwide. Students and teachers involved in the project indicated that fair housing may be incorporated successfully into classroom learning situations at both the elementary and secondary levels.

Fair Housing Center of Home Investments Fund (HIF)
Chicago, Illinois

Set in the Chicago metropolitan area, this project involved the design and conduct of a multimedia advertising and outreach campaign intended to increase the number of "fair housing moves"--moves by minority clients to predominantly white areas or by white clients to integrated or predominantly minority areas. Due to high housing costs and an inadequate supply of low- and moderate-income housing, the target group for this project consisted of individuals and families with an income of \$15,000 or more per year. The focus of the demonstration was to determine the cost-effectiveness of the various advertising and outreach techniques in reaching this group. The project clearly demonstrated the benefits of word-of-mouth and public service advertising over paid advertising in designing multimedia advertising campaigns to reach the target group. HIF developed an extensive network of contacts in various media which provided access to television and radio advertising and contributed to the cost-effectiveness of the project (by providing many services at a reduced rate).

Fair Housing for the Handicapped (FHH)
Des Moines, Iowa

This project was designed to address problems of housing handicapped persons and their families in the city of Des Moines. The project succeeded in increasing occupancy in existing independent units for the handicapped. This was accomplished through collaboration with the Easter Seal Society and resulted in 25 handicapped individuals moving into independent living units. The project also attempted to obtain commitments for development of facilities and programs to serve semi-independent individuals in congregate housing facilities. No specific commitments for development of congregate housing were obtained, but prospects appear good for future commitments. In addition, efforts were made to have been made to improve conditions for young and middle-aged handicapped persons who require long-term nursing care due to the severity of their physical disabilities and who often reside in nursing home facilities. No progress was made toward this objective during the course of the demonstration. The project did produce a film which was used to advocate for the housing needs of the handicapped. Overall, an increase in public awareness of the housing needs and problems of the handicapped was an important and significant accomplishment of the project.

**Coalition for Block Grant Compliance
Detroit, Michigan**

This demonstration proposed to develop and implement monitoring activities to oversee implementation of the Housing Act of 1964 and use of Community Development Block Grant (CDBG) funds in ten communities in the Detroit metropolitan area. A "citizen-based" system for monitoring CDBG activities was developed by the coalition, utilizing a combination of paid staff monitors and volunteer teams residing in each of the selected cities, counties or townships. The monitoring process entailed independent assessment of target areas' community development plans and performance based on the requirements of the Housing and Community Development Act of 1974. Special reference was given to HUD requirements for fair housing, housing assistance programs and citizen participation in the CDBG planning process. A number of community development issues were addressed by the ten monitoring teams. Although many more recommendations for change were made than were accepted and acted upon by community leaders, improvements were made in the areas of subsidized housing, housing rehabilitation, community services, zoning and fair housing.

**Fair Housing Council of Bergen County (FHC)
Hackensack, New Jersey**

The objective of this project was to increase the number of minorities interested in housing in Bergen County by conducting a concentrated recruitment program designed to appeal to urban dwellers. The Council hoped to increase the number of clients who contact the Council before or at the beginning of their housing search within the county--an "early intervention" program. The Council was successful in reaching the recruited clients at the beginning of their housing search and increased the number of minority clients from outside New Jersey (the normal FHC outreach area) by 49 percent as compared to a similar intake period in 1977. The "early intervention" counseling program was successful in broadening the range of housing options offered to minorities as well as enabling minority home- and apartment-seekers to recognize discriminatory practices by apartment managers and real estate brokers.

Suffolk Housing Services of the Smith Haven Ministries (SHS)
Lake Grove, New York

This project documented the homeseeking experiences of approximately 220 white and minority low-income families over an 11-month period and assessed the differences in housing opportunities available for minorities compared to those for whites. SHS was particularly interested in determining whether the Department of Social Services' policies had a discriminatory impact on the ability of minority welfare families to secure housing. The results of the project showed that all welfare families in Suffolk County, regardless of race, faced difficulties in obtaining housing. Although the Department of Social Services' policies appeared to have a greater adverse effect on minority families than on whites, SHS was unable to document specific discriminatory acts.

Housing Association of Delaware Valley (HADV)
Philadelphia, Pennsylvania

Activities conducted by HADV involved investigation and analysis of the manner in which four housing programs serve low- and moderate-income families: urban home-steading; a gift property program; Section 8; and the Community Development Block Grant program. Using information obtained through monitoring and data collection efforts, the project worked with a coalition of other community-based organizations to develop and employ strategies designed to increase goal achievement in these programs in Year IV of the city's Housing Assistance Program. None of the four housing programs examined during the course of the demonstration showed any evidence of increase in benefits to low- and moderate-income families. One major outcome was achieved as a result of the demonstration--that of getting the city to reallocate Year IV funds to the North Central Philadelphia area. However, the degree to which these funds are actually expended will not be known until the end of Year IV.

Orange County Fair Housing Council (OCFHC)
Santa Ana, California

This demonstration project proposed to develop and test the use of two low-cost audiovisual filmstrips and fair housing brochures to increase public awareness of the U.S. fair housing laws that prohibit housing discrimination. The filmstrips and brochures were produced in Spanish and English and were used to expose large numbers

of people to fair housing concepts. The filmstrips were shown in public places such as fairs and conventions, social service agencies and community events. They were also shown at large gatherings of selected special interest groups within the community including educational institutions, financial institutions, members of the real estate industry and local government officials. OCFHC estimated that 140,000 persons were exposed to the films and, as a result of viewing the films, almost 1,000 persons contacted the Council to request information or to volunteer for OCFHC activities.

Metropolitan Washington Planning and Housing Association (MWPHA)
Washington, D.C.

The main objective of this project was to increase the use of the equal housing opportunity logo/statement and to increase the use of minority models in display advertising. The project combined research and action components relating to the equal opportunity aspects of housing advertising. Activities focused on display advertisements of new housing in the two daily newspapers in Washington, D.C., and on conducting seminars and other activities relating to affirmative action advertising practices. The impact of project activities on changes in the rate of EHO logo use and minority model use in housing display advertisements was minimal. During the course of the demonstration project, logo use improved only marginally and minority model use showed no improvement.

It is anticipated that the outcomes of these nine demonstration projects will generate interest among PFHGs nationwide. Some of the projects demonstrated techniques that may be worth replication by other groups; other projects may indicate that certain activities are either beyond the capacities or of insufficient value to be undertaken. In any event, MBA hopes the information yielded from the demonstrations provides guidance for other PFHGs contemplating similar efforts or wondering how limited resources might be utilized effectively to affirmatively promote fair housing.

This document presents the final report of MBA's evaluation of the demonstration effort. Chapter II provides brief descriptions of demonstration project activities and outcomes and includes evaluative assessments of each project. Each project is assessed in terms of performance, process, use of resources and replicability by other fair housing groups.

Chapter III is a summary of the findings and conclusions of the demonstration projects and presents recommendations for future implementation and replication of the types of activities carried out by PFHGs. Comparisons are made between similar projects according to their approach and/or objectives. Major differences in approach, outcomes and resource utilization also are discussed.

Appendix A provides full descriptions of the nine demonstration projects, including major activities and findings. Further information about the demonstration activities and availability of the products developed can be obtained directly from the PFHGs. A list of addresses and contact people for each of the groups participating in the demonstration is provided in Appendix B.

CHAPTER II
DEMONSTRATION PROJECT CASE STUDIES

HOUSING OPPORTUNITIES MADE EQUAL

BUFFALO, NEW YORK

Housing Opportunities Made Equal (HOME), the only agency in western New York giving full-time attention to the enforcement of fair housing laws, has been involved for some time in educating Buffalo area citizens about fair housing issues. In this demonstration project, HOME developed and field-tested teaching modules on fair housing in selected elementary and secondary schools in metropolitan Buffalo.

DESCRIPTION OF THE DEMONSTRATION PROJECT

This demonstration was designed to assess the feasibility of instituting teaching modules on fair housing in public and parochial schools at the secondary and elementary levels in the metropolitan Buffalo area. The project was implemented to (1) develop educationally sound curriculum units on fair housing and (2) determine the responsiveness of school officials and teachers to the concept. The two stated objectives of the project were:

- Objective I: To develop social studies teaching modules for elementary and secondary schools that address the issue of fair housing
- Objective II: To assess the feasibility of instituting packaged teaching modules on fair housing by field testing the modules in selected elementary and secondary schools in the Buffalo area

As a result of a review of existing fair housing teaching materials, it was determined that instructional content on housing

opportunities was scarce and was limited to landlord-tenant problems and legal redress, with little emphasis on economic, social or legislative factors. The project staff therefore developed two teaching modules, one for use on the elementary level and the other for use on the secondary level. Each module included a "daily reaction form" to be completed by teachers participating in the demonstration and a form for teachers to use in evaluating the modules. Pre- and post-tests were designed for administration to participating students. These forms and tests were used to document processes and outcomes of the demonstration.

DEMONSTRATION PROJECT OUTCOMES

Observations by HOME staff and participating teachers regarding use of the modules in the classroom included the following:

- Urban students seemed to relate more readily to the content and to express more interest than students from rural or suburban areas.
- Secondary students appeared to be very interested in the economic factors relating to housing--housing prices, cost increases, taxes and assessments.
- Elementary students showed a higher level of social concern than the secondary students.
- Secondary students were more critical of the technical aspects of the materials.
- Senior high students appeared to have difficulty differentiating between prejudice (inference) and discrimination (action).

At the elementary level, teacher evaluations showed that supplemental materials were sometimes added to the modules to illustrate, review or provide additional information. No examples occurred where

teachers replaced content with other materials, but several suggestions were made for additional content on restrictive covenants, blockbusting, steering and other fair housing concepts. Many teachers cited the value of the modules as aids in developing students' vocabularies. Elementary teachers also noted that students were more interested in an event or a group of people experiencing housing problems than in the problems themselves or the underlying causes.

Secondary teachers relied on the module as the sole source of information or activity. They cited problems with student comprehension of the computer printout included in the section on redlining. Comprehension problems also developed around some of the terms used, particularly when words had a different meaning from normal usage. For example, they had difficulty understanding "assume a mortgage." Teachers suggested the addition of a glossary.

It appeared from the comments that, contrary to expectations, teachers did not find any subject too controversial for their classes. (There were segments on topics such as the Ku Klux Klan, the Japanese-American settlements during World War II, and other examples of racial and religious discrimination.) Interest was displayed regarding more content on government rent controls, property abandonment, housing rehabilitation, public housing, the Section 8 rent subsidy program and mortgages.

While most indicated that more time should be allocated to present the modules, the teachers unanimously expressed interest in continued availability of the modules for use in their classrooms.

MBA EVALUATION OF THE DEMONSTRATION PROJECT

Through the efforts of HOME, a new fair housing tool has been created that, with refinement, eventually could have widespread usage in school systems nationwide. The concept of reaching children and youths through the educational process to inform and sensitize them to fair housing issues could have far-reaching implications for social change as the students reach adulthood and become housing consumers. MBA's evaluation of the elements of this demonstration are provided in this section.

Performance Factors

As specified by the project work plan, two teaching modules were designed, field tested, revised and then tested again, with pre- and post-tests to determine content validity. Originally it was intended that the two field tests should take place in a total of 36 classrooms--18 elementary and 18 secondary. Only 23 classrooms participated in the demonstration, reducing the sample by more than one-third, thereby weakening the conclusions drawn from the testing effort. It is believed, however, that the data collected and analyzed through the field test provide supportive documentation of the validity of the materials and could serve as the basis for further testing and refinement of the modules.

Process Factors

MBA examined two major process aspects of the demonstration: (1) the process used to develop, test and revise the modules and (2) the marketing process used to promote participation of classrooms in field test activities.

Development and Test of the Modules

The content of both modules was a blend of new and existing material on housing issues; however, neither placed as heavy an emphasis on fair housing issues as might have been expected. Based on student and teacher reactions to the modules, changes were made in the content between the first and second field tests, but one recommended change--addition of a glossary--was not made. Prior to any effort to distribute the materials for further testing or public usage, this component should be added to the materials.

The field tests produced descriptive data on student and teacher reactions to the modules, statistical data on student test scores and changes between pre- and post-tests. Review of the data from the tests indicates that there are comparability problems as well as questions regarding whether the findings legitimately can be generalized.

Comparative student test scores among the disparate groups participating (public vs. parochial students, urban vs. suburban vs. rural schools, various ethnic and racial groups) invite speculation, but no conclusive statements can be made about the effectiveness of the materials with the different groups. Further research and additional analysis of the existing project data could lead to conclusions that may be more informative about the effects of neighborhood, ethnicity and school type on the learning process in relation to the subject of fair housing. Therefore, more rigorous testing and statistical analysis are recommended to enhance the future marketability of the modules.

Marketing the Modules

It was apparent from the demonstration that the first barrier to marketing the materials is to get schools or school districts to agree to allow such materials to be included in an appropriate curriculum.

Three elements of the marketing approach may have had an effect on the level of response received. First, the project's sponsor, HOME, is well-known for its fair housing activism, but the organization never was identified with the materials. Second, the materials were not promoted as a fair housing curriculum and, third, the field tests schedules were in conflict with other important school activity periods.

Because HOME chose not to be identified at all with the modules, it is impossible to determine if the response would have been different had such identification been made. It would have been an interesting addition to the demonstration if some of the modules had been marketed by HOME itself to measure any difference in the type or level of response. It also would have been interesting to assess receptivity if the material had been available for an entire academic year and not just during two six-week periods.

It is not possible to draw any valid conclusions about difficulties that might be encountered in marketing a fair housing curriculum that has been identified as such. The initial response rate was slightly more than 15 percent of all the school principals contacted; however, there is no way to determine if the response rate would have been less if the modules had been presented as primarily devoted to fair housing

issues. Calls to principals who did not respond to the promotional materials shed no light on the issue. However, it is interesting to note that no positive responses came from school districts adjacent to the city's boundaries.

It appears that marketing efforts may have been more effective if they had been directed at individual teachers as well as principals. Once teachers were provided the opportunity to use the modules, they became enthusiastic supporters.

Resource Factors

Most of the subcontract funds for this demonstration were expended on personnel expenses. The only other significant expense was for development of the initial and revised instructional packages. The cost of these two versions of the modules was \$3,500.

Replicability Factors

Demographic factors were identified as having the most importance to replicability of the use of fair housing teaching modules in other areas. The socioeconomic composition of an area and its geographic location both appear important in terms of likely receptiveness to use of housing-related materials.

Based on data from the first field test, schools in white or integrated neighborhoods were most willing to participate; no schools in black neighborhoods responded positively to the first promotional campaign. (Comparable data on the second promotion was not included in HOME's report.) A greater percentage of city than suburban or rural

schools expressed interest. It also appears from that data that proximity to federally assisted housing correlated positively with willingness to participate. Although these are interesting findings, no conclusive evidence was developed that would guide other PFHGs in efforts to introduce fair housing curricula into local school systems.

A number of schools in areas with one or more predominant ethnic groups participated. Whether middle-class or working-class, schools in older suburban neighborhoods tended to express less interest than schools in newer neighborhoods. Unfortunately, descriptive data on all schools contacted in the marketing effort were not collected by the project staff.

No data were provided on the level of school integration. Although the racial composition of the neighborhoods in which nonrespondent schools are located was provided, the project staff emphasized that the racial composition of a school did not necessarily reflect that of the surrounding neighborhood. Suburban schools bordering on the city were the group most glaringly underrepresented among interested schools. Parochial schools tended to exhibit a higher percentage of positive responses than public schools.

Predictably, it is concluded that receptivity to implementation of housing modules will vary according to the demographic characteristics of the school district, the schools themselves and the neighborhoods in which the schools are located. Again, further testing of the materials with a more rigorous correlation of test results to demographic factors would provide substantive documentation of the transferability of these teaching modules.

FAIR HOUSING CENTER OF HOME INVESTMENTS FUND
CHICAGO, ILLINOIS

Home Investments Fund (HIF) was founded in Chicago in 1968 for the primary purpose of developing programs that would be instrumental in implementing the federal fair housing law. While over the years new programs have been included in response to changing conditions, HIF's principal mission has remained constant:

To aid minority homeseekers in locating housing opportunities throughout the Chicago metropolitan area--particularly outside traditional areas of minority residence.

Toward this goal, HIF has attempted to increase the number of minority families taking advantage of a wide range of housing opportunities by advertising its services to potential homeseekers.

DESCRIPTION OF THE DEMONSTRATION
PROJECT

As an approach to its demonstration, HIF chose to design and implement a multimedia advertising campaign and launch a media outreach effort. This approach was intended to make the public aware of HIF services, but the objective was to increase the number of clients who make what is called a "fair housing move" (a move by a minority client to a predominantly white area, or move by a white client to an integrated or predominantly minority area). The stated objective of this demonstration project was:

To increase the cost-effectiveness of their public relations program by increasing the number of clients with incomes of \$15,000 or more by 100 percent and by

increasing the number of fair housing moves by 50 percent

Activities undertaken by HIF to achieve this overall objective included:

- Developing and implementing a plan for a multi-media advertising program
- Developing and implementing a program of media outreach to potential clients through guest appearances on radio and TV shows and through production of newspaper feature stories
- Collecting intake data on all new clients making inquiries and/or seeking services during the course of the demonstration

The desired outcomes of the multimedia advertising program were to:

- Increase client intake among the \$15,000 population
- Increase the number of fair housing moves
- Identify the most cost-effective media approach to achieve such increases

Over a nine-month period (the advertising campaign was not fully operative until the third month of the project) HIF collected data and measured the outcomes of the advertising effort. These data were matched with figures for previous calendar years, making it difficult to compare the nine-month client intake period and the twelve-month time frame of former years' public relations activities. For example, HIF had 1,774 clients during the 1978 demonstration period, compared with 1,164 for calendar year 1977 and 1,215 for calendar year 1976. Using a prorated figure for 1978, clients earning \$15,000 or more increased 37 percent.

There were 166 fair housing moves from March through December by clients responding to the media campaign; this figure is compared to 233 for 1977. HIF cannot yet determine whether and to what degree fair housing moves increased until the 734 cases remaining open at the end of the demonstration period can be followed up.

In attempts to determine the cost-effectiveness of the media campaign, HIF concluded that personal contact proved to be the most effective means of generating clients with incomes of more than \$15,000 and clients who made fair housing moves.

Other cost-free approaches were also most effective in attracting \$15,000+ clients, including agency referrals and television public service announcements. The innovative use of public transit displays resulted in the fewest clients and moves, along with radio PSAs, which netted comparable numbers. The table below shows the results of using the different media approaches.

MEDIA EFFECTIVENESS IN PRODUCING CLIENTS

Media Approach	Percent of Fair Housing Moves	Percent of \$15,000+	Percent of All Clients
Friends	51	30	25
Agencies	18	18	17
Newspapers	11	21	24
Television	9	19	18
Radio	4	6	6
Transit Displays	4	5	6

MBA EVALUATION OF THE DEMONSTRATION PROJECT

The extensive use of free media in the advertising program developed by HIF made it difficult to analyze and compare the cost-effectiveness of various types of advertising in generating client contacts that lead to fair housing moves. The project clearly illustrated that the number of clients seeking fair housing moves was limited and that the most cost-effective approaches to attracting clients involved free media: word-of-mouth advertising, referrals by other fair housing and social service agencies and public service announcements. There is some question as to whether these findings legitimately can be generalized and used to guide other fair housing organizations to develop advertising programs.

Performance Factors

Project staff identified several unanticipated problems that negatively impacted the project results. Because the fair housing advertising campaign was not fully operative until the third month of the demonstration project, the actual client intake period was limited to nine months. In addition, intake data collected for this project on a calendar year basis had to be compared to data for previous years that were collected on a fiscal year basis. This presented comparability problems and project staff found great variations in results depending upon whether fiscal year or calendar year data were used.

When using fiscal year data (1976 and 1977) for comparisons, clients earning \$15,000 or more increased only 18 percent and clients who

made fair housing moves actually declined by 34 percent. However, using calendar year figures for 1976 and 1977, clients earning \$15,000 or more increased 37 percent during the marketing program.

Additional analysis problems resulted when HIF attempted to determine whether there were an increased number of fair housing moves among clients served by the project. Because a great proportion of moves occur four to six months after counseling has begun, the total number of fair housing moves made as a result of the advertising campaign could not be determined during the demonstration period. In view of this, it is questionable whether the demonstration objective to increase the number of fair housing moves by 50 percent was realistic. Given the six-month lag time between the beginning of the housing search and the moving date, it appears that a lesser increase, perhaps 25 percent, would have proven more attainable.

Process Factors

MBA examined three major process aspects of the demonstration: (1) use of mass media advertising program incorporating paid and service advertising, (2) use of a media outreach approach to expose clients to the project through guest appearances on radio and TV shows and newspaper feature stories, and (3) messages conveyed through advertising and outreach activities.

Mass Media Advertising Program

The demonstration project showed that referrals by satisfied clients, friends and other local agencies were the most effective and

least costly advertising approaches for reaching the \$15,000+ client target group. The method producing the poorest results--transit display advertisements--was the most costly. Although project staff emphasized the cost benefits of word-of-mouth and public service advertising compared to paid advertising, they did not include the contributed services of the HIF staff and friends when calculating the costs. The "hidden costs" significantly change the actual cost of these types of "free" advertising.

Media Outreach Program

The outreach program developed by HIF included guest appearances by HIF project staff and others on radio and television talk shows. The number of newspaper articles during the project period was comparable to previous years and the number of television and radio appearances by project staff exceeded those in previous years. Only speeches and trade publication articles were well below the numbers in previous years. Unfortunately, the project staff did not document increases in the level of inquiries attributable to specific media outreach activities and it is therefore not possible to say which specific techniques work best.

Advertising Messages

The message content of various advertising approaches appeared to have no discernible impact on the numbers and types of clients responding and contacting HIF. Project staff were unable to find any correlation between message content and the level of response by specific types of clients. However, the message content of the various advertising

approaches varied only slightly and the messages were almost identical; only the media used to convey the messages were different.

Resource Factors

Subcontract funds were used primarily for direct cost items including media production. Approximately 35 percent of the total budget was expended on staff salary (one full-time person). Over the course of the demonstration, the HIF executive director allocated approximately 22 percent of his time at no charge to the project. This included public appearances by the executive director as part of the outreach activities.

Several of the services required to develop and implement the media campaign were provided to HIF at no charge. Transit advertisement design as well as the creation and production of the television public service announcements were completed by friends of the project staff at a cost far below the market rate. These contributed services had a significant impact on reducing the overall costs of the demonstration but make comparison of the cost-effectiveness between paid advertising and other media or outreach activities virtually impossible.

Replicability Factors

As in many other major metropolitan areas, blacks in Chicago are steered to, or voluntarily seek, housing in neighborhoods that are predominantly black. The reverse situation is true for white homeseekers, creating a dual housing market. An advertising campaign such as the one launched by HIF can convey to minorities and others traditionally

excluded from the open housing market that there are a range of housing opportunities throughout the metropolitan area.

Of importance in efforts to replicate portions of the advertising campaign is an assessment of the types of media present in the area. For example, while the project did not report the specific newspaper sources used by the minorities who contacted HIF during the demonstration, one suburban weekly with a large minority readership accounted for 41 percent of all clients responding to print advertising.

Another finding pertinent to replication is that clients earning \$15,000 or more and clients making fair housing moves responded in differing order to the different approaches. This points out the importance of including in a campaign a wide variety of approaches to attract diverse groups of clients.

Responsiveness of the media agencies to requests by HIF definitely contributed to the effectiveness of the project. Home Investments Fund had over the years developed an extensive network of contacts in various media. Some of the media services obtained by HIF were at greatly reduced rates and the videotapes used for PSAs were produced at a cost not likely to be obtained by other PFHGs.

FAIR HOUSING FOR THE HANDICAPPED
DES MOINES, IOWA

Fair Housing for the Handicapped (FHH) is an advocacy group working to improve the availability and quality of housing for the handicapped in Des Moines, Iowa. This demonstration project focused on the need to develop congregate housing for semi-independent living, the need to improve nursing home conditions for nonelderly handicapped residents and the need to match qualified handicapped tenants with available independent housing units.

DESCRIPTION OF THE DEMONSTRATION

With the city's assistance, FHH developed an agreement with the Office of Community Development for its handicapped housing specialist to work with the demonstration project. In addition to a substantial percentage of the specialist's time, the city provided office space and telephones for use by other FHH personnel.

Two objectives were established to address the housing needs of the handicapped in Des Moines:

- Objective I: To increase the handicapped occupancy rate for existing and committed independent housing units, and to obtain a commitment from public and private resources for development of 30 units of congregate housing facilities for semi-independent living with supportive services
- Objective II: To obtain commitments and resources for development of facilities and/or implementation of programs which will improve conditions for young and middle-aged handicapped persons who require nursing care

but who are not chronically ill and who reside in nursing homes because there are no suitable alternatives

Throughout the demonstration period, FHH worked constantly to bring the housing problems of the handicapped to the attention of the public. This was accomplished through the use of extensive media coverage of FHH activities on television, radio and in the newspapers. The project staff also produced a film which focused on the housing needs of the handicapped and developed and disseminated a brochure describing FHH and its program.

To increase occupancy in independent living units, FHH collaborated with the Easter Seal Society to establish and operate an information center that identified accessible units of existing housing stock and, at the same time, identified handicapped individuals who needed housing and were willing to move. A variety of approaches were used by FHH to obtain commitments from the city of Des Moines for congregate housing units. An additional objective of the project was to improve nursing home conditions for the handicapped. FHH staff met with the State Board of Nursing Home Administrators to discuss the need for young and middle-aged handicapped individuals to be housed separately from the seriously ill and to describe alternative programs.

DEMONSTRATION PROJECT OUTCOMES

FHH found that the information campaign efforts were successful in reaching handicapped organizations and public and private officials, but the project had little success with the "unaffiliated" handicapped.

Through the information center, established and operated in conjunction with the Easter Seal Society, FHH was able to assist 25 handicapped individuals in locating suitable, affordable housing.

Staff were unable to gain cooperation from nursing home administrators to document the problems facing handicapped individuals or to discuss alternatives other than institutionalization. FHH also was unable to obtain a commitment for development of congregate housing, although a number of potential funding sources were identified.

MBA EVALUATION OF THE DEMONSTRATION PROJECT

This demonstration project addressed three separate objectives: (1) to increase occupancy in existing independent units, (2) to obtain commitments for development of 30 units of handicapped housing and (3) to obtain commitments and resources to improve nursing home conditions for the handicapped. Each area was evaluated in terms of the four demonstration elements--performance, process, resources and replicability.

Performance Factors

Occupancy in Independent Units

FHH was to determine the number of vacant and planned independent units in Des Moines and to identify a pool of qualified tenants to move into these units. Although FHH was not able to identify the exact number of vacant units, it was able to infer from the many criticisms of owners and managers of accessible apartment units that the vacancy rate was high and burdensome. Through collaboration with the Easter Seal Society, 25 handicapped individuals were helped to move into independent living units.

Development of Congregate Housing

No specific commitments for development of congregate housing were generated as a result of the demonstration, but prospects appear good for future commitments. Participation of the city's Department of Community Development in seeking commitments was a key factor in achievement of progress toward this objective. With the commitment of city funds for advocacy efforts for congregate housing, a number of opportunities were given for FHH to present its case for developing housing units for semi-independent living. Also, both city and federal resources were identified that could pay for the supportive services required for congregate facilities, thus overcoming a major problem in efforts to promote this type of housing development.

Improvement in Nursing Home Conditions

Little effort was made to obtain improvements or to secure agreements for improvements in conditions for young and middle-aged handicapped nursing home residents. No progress was made toward this objective during the course of the demonstration.

Process Factors

Activities conducted to achieve each objective were evaluated from two perspectives: (1) efforts to get support and (2) efforts to get commitments. Achievement of public awareness of the housing needs and problems of the handicapped was the first step in the process, followed by activities to obtain promises from the public for various types of participation related to the three demonstration objectives.

Efforts to Heighten Awareness
and Obtain Support

A varied and energetic public awareness campaign was conducted during the demonstration project using the mass media and more personal types of contacts. Most of the mass media advertising was free of charge, i.e., interviews on evening news programs, newspaper feature articles, radio public service announcements and participation on television talk shows. Paid activities included a newspaper advertisement soliciting members for FHH, a printed monthly newsletter and a film on the housing problems of the handicapped. Activities of a more personal nature included a one-week handicapped housing conference, a two-week handicapped awareness campaign and meetings with handicapped organizations, public agencies, private organizations, and unaffiliated, handicapped individuals and their families.

Although it is not possible to attribute specific outcomes to any given approach, it was clear at the end of the project that public awareness had been heightened among the various target groups, with the exception of the unaffiliated handicapped.

FHH was supposed to recruit support from the unaffiliated handicapped through special meetings designed to inform them about the viability and advantages of independent and semi-independent living and to get them involved in the project's effort to promote resolution of housing problems of the handicapped. This type of activity, however, was not conducted and, consequently, involvement among this group was minimal.

One reason FHH did not hold the planned meetings was that a film to be produced with demonstration funds and to serve as the core of the presentation was not completed until the demonstration was officially ended. This film, entitled "One of Us," would have been a powerful tool to generate support, particularly among nonhandicapped people. Its theme was that anyone can become handicapped as a result of an accident. The movie showed how difficult it is to adjust to living in a nonaccessible environment and how FHH could help locate suitable housing. It is unfortunate that the film was not ready for use during the demonstration period because the awareness of FHH programs among selected populations, including the unaffiliated, could have been increased dramatically using a newspaper advertisement and other types of publicity. Membership increased by 100 persons; how many of them were handicapped was not determined by FHH.

Efforts to obtain support from public officials, private organizations and individuals met with much greater success than activities directed toward the handicapped and the general public. As expected, city officials were extremely cooperative and supportive, and FHH had excellent access to representatives of financial institutions, builders, developers, architects, and planning and zoning officials. At some point during the demonstration, FHH met with members of each group to determine what types of support they might be willing to give to the development of 30 units of congregate housing. Many promises for assistance were made by cooperative individuals and, during the course of the project, some progress was made to develop a coalition of parties which collectively could pursue development commitments.

Efforts to Obtain Commitments

Lack of an audiovisual aid and elimination of educational meetings from the demonstration work plan are two of the reasons FHH was unable to get active involvement and commitments for participation from the handicapped themselves. One task to be conducted was to develop a list of prospective tenants who were qualified to rent both accessible and congregate units. Such a list was not developed and FHH had to rely on another organization to generate increased occupancy in independent living units.

When FHH conceived of this demonstration, its hope was to have the city government commit itself to build 30 units of congregate housing. It was assumed FHH would have to convince the county to provide the requisite social services for the facility. FHH found the most productive route likely was the Section 202 Direct Loan Program to develop housing for the elderly and nonelderly handicapped who are able to live semi-independently. Another alternative was to combine congregate housing with an intermediate care facility for the more severely disabled who need nursing care. It became clear that both these approaches would require considerable organizational resources. During the demonstration, FHH was beginning to consider opportunities for collaboration and joint ventures.

While no specific commitments were obtained to build and provide services for the desired 30 congregate units, there was good potential for future achievement of that objective.

Improve Nursing Home Conditions

Little effort was made to obtain improvements or agreements for improvements in conditions for young and middle-aged handicapped residents of nursing homes. FHH was unable to gain access to nursing home facilities to document the problems and a meeting with the State Board of Nursing Home Administrators was not fruitful in obtaining information or support. After meeting resistance from nursing home administrators, FHH did not pursue the issue further except to respond to two requests for assistance from the families of handicapped nursing home occupants.

Resource Factors

FHH received a \$25,000 subcontract used primarily for direct cost items, e.g., media production, mailing costs, travel expenses. Salary costs were minimal because the city contributed the time of the handicapped housing Specialist assigned to work with the project. Seventy percent of his time was allocated to the demonstration. FHH paid a part-time salary for two staff persons during the period of the demonstration.

Office space, telephones and clerical support were provided by the city with the value of these contributions estimated at \$10,800. Other in-kind resources were services contributed by Drake University, which provided assistance in media development and production. The cost to develop the movie--a 14-minute, 16mm film--was only \$10,000. That price would be nearly impossible to find in most places. The average cost per minute of film is currently more than \$1,000.

FHH used the volunteer services of its board members for a variety of demonstration activities, particularly in connection with the public information campaign. This saved on salaries and other personnel-related activities.

Replicability Factors

Des Moines can be considered typical of many urban areas of the country in terms of its handicapped population. It is, therefore, assumed that Des Moines' need for housing for the handicapped is not unique. What is unique is Des Moines' supply of independent living units. In evaluating this demonstration for potential replication elsewhere, this factor is of primary consideration.

Handicapped Housing Law

Legislation similar to Iowa's law requiring ten percent of newly developed housing be accessible to the handicapped is not common among the states. Therefore, accessible units for independent living are not likely to be readily available in other places. In Des Moines, FHH could skip one essential step probably required elsewhere--that of having to begin advocacy for development of accessible units. There will be ready transferability where there are accessible units that are either vacant or not being occupied by handicapped persons. The components of the demonstration that dealt with the need for congregate housing facilities for semi-independent living and conditions for handicapped in nursing homes were not affected specifically by the law. However, it appears that for each problem area, efforts to advocate with public agencies, builders, developers, architects and handicapped organizations

were facilitated by the presence of the law. There is no evidence, however, that because of the law the general public and the handicapped were more aware of the need and problems of the handicapped.

Cost of Housing

A major problem for prospective handicapped tenants was the cost of housing--a situation likely to be encountered everywhere. Independent units renting at market rates cannot be afforded by the majority of handicapped persons, who tend to have disproportionately low incomes. In Des Moines, the average monthly rent for a one bedroom apartment was well over \$200, in addition to utility costs. Because accessible apartments tend to be newly constructed, the rental rates were on the high end of the price range.

To exacerbate the cost problem, landlords typically refused to accept subsidies, excluding a significant percentage of the handicapped population from renting accessible units. Refusal to accept subsidies led to high vacancy rates or occupancy of accessible units by nonhandicapped tenants. A campaign was undertaken to convince landlords to accept handicapped tenants with Section 8 subsidy certification, which met with some success. Similar problems could be anticipated in other localities where the handicapped seek units in market-rate housing.

Presence of Organizations for the Handicapped

There are numerous organizations in Des Moines competing for scarce resources and support for their handicapped programs and services. While this makes it more difficult to garner individual supporters for

any given effort, it makes it easier to coalesce, collaborate and work together toward common ends. This appears typical of most other areas.

Involvement of City Agency

A critical factor in this demonstration was the affiliation between FHH and the city through the active involvement of the city's handicapped housing specialist in the project. This individual had a high degree of visibility and was able to gain access to many public officials, which might have been more difficult had he not been a representative of a public agency. Also due to the specialist's dual role as the city's advocate and the most visible person in the demonstration, FHH was invited to become involved in many city- and state-sponsored programs and thereby was able to gain access to a broad spectrum of individuals and organizations with which to collaborate.

The basic replicability issue is that government agencies were open to participation and agreed to do various things to facilitate the demonstration efforts. While a formal coalition with a city agency is not viewed as essential, it can facilitate achievement of certain goals. Other private fair housing groups wishing to duplicate aspects of this demonstration should consider developing either a formal or informal relationship with an appropriate local agency.

COALITION FOR BLOCK GRANT COMPLIANCE
DETROIT, MICHIGAN

The Coalition for Block Grant Compliance was funded to develop and implement a "citizen-based" system for monitoring Community Development Block Grant (CDBG) activities in ten suburban Detroit communities. This system used a combination of paid staff monitors and volunteer teams of individuals who reside in each of the selected cities, counties or townships. These teams functioned as advocates and catalysts for improving compliance with HUD requirements for fair housing, housing assistance programs and citizen participation in the CDBG planning process.

DESCRIPTION OF THE DEMONSTRATION

Funds provided for the demonstration project enabled the Coalition to test the efficacy of local monitoring teams to bring about improvements in the CDBG programs in their communities. By using residents of a given community, the Coalition anticipated more response from local CDBG officials than may have been possible otherwise.

Developing the Monitoring System

The approach initially developed to carry out this project was for the local teams to use legalistic review and oversight techniques similar to those traditionally employed by the Coalition. The teams were to address systematically four requirements:

- That cities submit Housing Assistance Plans which identify the housing assistance needs of present and future residents

- That CDBG programs give "maximum feasible priority" to the needs of low-income persons in the expenditure of CDBG funds
- That cities assure they will take affirmative action in the employment-related aspects of CDBG-funded programs
- That cities give citizens adequate opportunity to participate in planning and development of their local CDBG programs

To address these issues, the Coalition established five related objectives and devised a complex and fairly rigid set of procedures to be carried out by the monitoring teams. These procedures were to have been in the form of a standard monitoring guide based on the most recent CDBG regulations.

When the project began, HUD's CDBG regulations for 1978-79 had not been published and the Coalition was reluctant to establish procedures that did not conform to the final version. However, because the project was funded for only twelve months, the Coalition was equally reluctant to wait for the regulations to be made final before starting the project. Thus, the ten communities were selected; paid staff monitors were hired; the monitors formed local citizen monitoring committees and began collecting their respective CDBG applications and performance reports.

As the teams became familiar with the needs and problems in their particular communities, they began to make decisions about which issues were important and what changes and improvements were desirable in the CDBG programs. Consequently, when the HUD CDBG regulations finally were

published, and the Coalition could develop standard forms and specific procedures for addressing the selected issues, the local communities were well on their way toward advocating the issues they had identified and chosen as important in the communities in which they lived. It became clear that even though forms and procedures could have been devised at that time, the teams had built up too much momentum to reverse or even to modify their direction.

This sequence of events pointed out the basic error in the original project design was to impose a preconceived set of priorities and structured procedures on volunteers who have a vested interest in events in their communities and are, consequently, more inclined to select their own issues and implement their own strategies. The solution, as agreed by the Coalition and MBA, was to modify the approach to eliminate the rigidity of the original design and to test, instead, the outcomes of a self-directed team monitoring process. The result was that the following general objective was established:

To bring about specific improvements in Community Development Block Grant Activities in the ten selected jurisdictions, through a variety of citizen efforts--primarily in the areas of fair housing, benefits to low-income and minority persons, provision of housing assistance, and citizen participation

Rather than the original complicated set of more than 40 tasks and sub-tasks, the following activities were to be conducted to achieve the objective:

- Develop, organize, manage and refine a citizen-based system for monitoring Community Development Block Grant programs in ten selected Detroit area jurisdictions
- Advocate for improvements in local block grant programs based upon citizens' analyses of past and present performance plans
- Analyze the monitoring methods used by the teams by comparing each team's recommendations and responses received with the process used by the respective teams in conducting the monitoring

These modifications simplified the structure of the project and permitted the flexibility for each team to set its own local priorities and to use whatever strategies it deemed likely to be most effective.

DEMONSTRATION PROJECT OUTCOMES

As could be expected, many more recommendations for change or improvement were made than were accepted and acted upon by community leaders and the HUD Area Office. Of ten problem areas addressed by the community-based monitoring teams, the following overall outcomes were achieved:

- In six communities, a mechanism was developed to facilitate communications between community leaders and concerned citizens.
- In five communities, improvements or changes were made in assisted/subsidized housing.
- Rehabilitation issues were resolved in four communities.
- Problems relating to community services were addressed in four communities.
- The zoning/code issues raised in two communities were addressed.
- One community took action on a fair housing issue.

As a result of the outcomes of the demonstration projects, the director of the Coalition expressed the intention of the Coalition to continue to use community-based volunteer monitors as an extension of the Coalition in the cities and townships surrounding Detroit. The organizations will explore the development of resources to support this effort.

MBA EVALUATION OF THE DEMONSTRATION PROJECT

Only one general objective was addressed by this project--to improve CDBG programming in four areas: (1) fair housing, (2) benefits to low-income and minority persons, (3) provision of housing assistance and (4) citizen participation. Findings of MBA's evaluation of the efforts and outcomes of the citizen-based monitoring demonstration are discussed in the following sections.

Performance Factors

Two elements were assessed in the area of performance: (1) the establishment of a functional citizen-based monitoring process and (2) the level of programming improvement generated in the four issue areas.

Establishing the Monitoring Team

The Coalition was able to activate monitoring teams in each of the ten target communities, although only eight continued to function throughout the demonstration period. Where the teams were not operational, the Coalition's paid staff monitor filled the gap.

Improving CDBG Programming

Any examination of the efforts and activities of the individual monitoring teams must include a look at the issues, needs and problems these locally-based, citizen-directed groups chose to address. Such factors must be viewed in the context of the overall objective of the entire demonstration--to use the monitoring teams to create change in four areas: (1) fair housing, (2) low-income housing, (3) housing assistance and (4) citizen participation. Population groups of particular concern were low-income persons and members of minority groups. A review of the problem areas addressed by the teams reveals the following:

<u>Problem Area</u>	<u>No. of Teams Addressing</u>
Housing rehabilitation and related activities	8
Fair housing or housing discrimination problems	7
Development or expansion of subsidized/assisted housing	6
Improvement in community services, e.g., water, sewers	5
Special attention to minority sectors of community	5
Location of community improvements, e.g., streets, parks	4
Problems related to equal employment opportunities or affirmative action	3
Citizen participation	3
Adverse impacts on low-income persons	3
Zoning and code problems	2

As can be seen from this summary of the problems addressed, all ten teams did not address both the project-selected objective and the designated target populations (low-income and minority groups).

It is interesting to note six of the teams (60 percent) addressed subsidized housing and five communities agreed to correct problems or make improvements in this area. This is more significant than it may appear on the surface, because MBA found the development and the location of assisted and subsidized housing units constitute the most controversial housing issue in the Detroit metropolitan area. In discussions among MBA, local community development directors and HUD Area Office officials, this subject was cited repeatedly as a major problem in many of the suburban cities, counties and towns. One of the target cities has dropped out of the CDBG program and one is threatening to follow suit. A third lost its funding from its parent county. In each instance, the issue was assisted housing. This illustrates the vehemence with which some communities fight the development of low- and moderate-cost housing.

HUD and local officials in the area expressed a belief that the typical suburbanite translates the concept of assisted or subsidized housing into the concept of public housing, loosely conceived as "the projects." A contributing factor in that translation is that public housing in the city of Detroit is in large part deteriorating, crime-ridden and almost exclusively inhabited by blacks. (Many of today's suburbanites left Detroit to escape the racial problems of the late sixties.) Consequently, in the mind of the consumer, there is a connection between assisted and low-income minority housing. Suburbanites

have a strong fear that to allow assisted housing into their community is to invite the very problems from which Detroit suburbanites sought escape.

It is very interesting that almost every individual who discussed with MBA the assisted housing problems in the metropolitan area insisted that Detroit was unique in this regard. They maintained the number of withdrawals and expulsions from the block grant program that had occurred in the Detroit area had not occurred in other major cities. While this is an interesting hypothesis, it requires further exploration. Within such a climate it is surprising the monitoring teams (1) were willing to address the issue at all and (2) were able to effect any changes or improvements in assisted housing activities.

Process Factors

MBA assessed four process elements to evaluate the use of community-based volunteers to monitor the CDBG program and to bring about improvement or changes in the activities conducted in the ten selected communities: (1) the use of volunteers rather than exclusively paid staff, (2) review and assessment procedures, (3) activities to create change and (4) HUD Area Office involvement.

Use of Volunteers in CDBG Monitoring

The primary process factor examined by MBA was the use of volunteers in the monitoring process by establishing teams in selected local communities. Volunteers were used in lieu of paid staff. Paid staff

were used traditionally by the Coalition and several aspects of the use of volunteers were examined.

First, the geographic coverage obtainable by corps of six to fifteen volunteer monitors in each community cannot be duplicated by a paid staff effort, except at exorbitant expense. Second, the involvement of individuals in their own communities contributed to the depth of knowledge and, more importantly, concern about the issues and problems being monitored. Evidence from the demonstration supports the hypothesis that local officials would be more responsive to suggestions from members of the community to change or improve specific programs than they had been to the Coalition staff in the past. Third, to set up community-based teams of volunteers, full-time paid staff are needed to assist and oversee the team's activities because of (1) the part-time nature of the paid monitor's position and (2) the general lack of sophistication and experience of the typical team. Although the Coalition concluded that it would be optimal to have four or five full-time staff members for ten communities, it appears likely that this could be reduced with more extensive training of both team leaders and volunteers; an approach often used to maximize the effectiveness of volunteers.

Disadvantages of using volunteers are: (1) high turnover among the paid team leaders in some communities and (2) difficulty keeping teams functioning in other communities. However, given the scope of the monitoring demonstration and its one-year duration, remarkable success was achieved using volunteer community teams.

Identifying and Assessing Issues and Problems

Each team was allowed to set its own priorities and develop strategies to address the problems they selected as the most pressing needs of the community. In many moderate- to high-income communities with negligible minority populations, fair housing was perceived to be a problem, but the need for assisted housing was identified and targeted by the team. As a result, all four issue areas defined by the demonstration objectives were not addressed by each team. Each team did follow the same steps to review the available CDBG program data and performance information. The teams also followed a set of steps to inform HUD officials and local CDBG officials of deficiencies or problems noted in the plans and performance reports. Therefore, it appears feasible for certain processes and procedures to be standardized. However, it is clear from the demonstration that selection of issues and problem areas cannot be standardized systematically if volunteers with a strong interest in their individual communities are to enter wholeheartedly into the monitoring process.

Bringing About Change

After the formal comments were made, the teams embarked on efforts to get local CDBG officials to address the problems and/or deficiencies noted in their performance and local Housing Assistance Plans. Varied activities were conducted, ranging from meetings with city officials to holding a countrywide conference. The teams participated in public hearings and other citizen participation mechanisms. Some teams used access to the political machinery to communicate with officials about needed

change. In most cases, team members dealt directly with CDBG officials and, often, city council members and other elected officials.

Some teams' approaches primarily involved open communications with public officials. Some teams took on the task of "educating" the officials, while others decided to adopt a confrontative stance and employed a variety of adversarial tactics. One team operated clandestinely, working behind the scenes to avoid public notice of their efforts to impact on the CDBG program. These styles resulted in various outcomes. No one approach appeared more "successful" than another as there are too many factors involved in community dynamics to permit a valid assessment of the effectiveness of the different styles or strategies used by the teams.

HUD Area Office Involvement

An excellent relationship had been established by the Coalition with the HUD Area Office--an office that, for the most part, is very active in enforcing communities' compliance with the CDBG regulations and in providing CDBG monitoring teams with necessary information about CDBG plans and performance. Knowing they were backed by HUD enforcement, the community teams seemed confident to address the more controversial issues of housing discrimination and assisted housing.

Resource Factors

Most of the subcontract amount was used for salary expenses for the director and the paid monitors. Other expenditures were made for operating expenses; however, this demonstration made extraordinary use of

supplementary resources. Volunteer time was valued at \$16,000 and the use of CETA trainees provided an additional resource worth \$20,750. Student interns were used during the various phases of the project for an in-kind contribution of more than \$11,000. Detroit clearly demonstrated the effectiveness of using volunteers and other personnel resources at minimal expense to the project. By doing so, they added a total of nearly \$50,000 in resources to their subcontract budget.

Replicability Factors

Two factors were examined by MBA as having particular pertinence to replicability of the use of community-based volunteer monitoring teams: community characteristics and organization issues.

Community Characteristics

MBA found there were noteworthy differences in socioeconomic, demographic and other characteristics--including the political climate--among communities. The following variables appeared to affect the outcomes in various ways:

1. The type of people who volunteered for monitoring
2. The issues and problems the teams chose to address
3. The teams' styles of interacting with local CDBG and elected officials and the strategies employed to effect changes
4. The reactions or stances of the local officials and elected bodies, including the willingness of CDBG officials to communicate with the teams and to receive recommendations for change or improvement
5. The inflammatory nature of the press on some CDBG issues. (Coverage usually was reactionary if any was provided at all.)

6. The personality and style of the part-time local staff monitor who set up and coordinated the team
7. The fears and concerns of the community about assisted and fair housing

For groups wishing to replicate the volunteer monitoring model, it is suggested that preliminary groundwork be done to identify and define critical factors which could affect outcomes and to develop strategies that account for the manner in which each could affect results.

Organizational Issues

The Coalition for Block Grant Compliance has as its primary mission and function the monitoring of local CDBG programs. The Coalition learned that the successful development and operation of volunteer monitoring teams did not depend on the extensive legal experience of volunteers with the CDBG program. Given solid groundwork in the program requirements and regulations, and a general framework of processes and procedures within which to function, the community teams were able to review the CDBG plans and performance reports and cite problems and deficiencies in their formal comments to HUD. The teams were able to make the necessary contacts and develop channels of communication with the proper CDBG officials and members of elected bodies.

Without legal experience or extensive professional guidance, the teams generated numerous positive changes and improvements in their communities. The Coalition's typical adversarial posture, and its reputation for such, seems less effective than the use of local teams, because team members who live in the communities monitored are not

perceived to be "outsiders." It is concluded that most private fair housing groups, even those not previously involved in CDBG monitoring, could establish a comparable program using volunteer monitoring teams.

FAIR HOUSING COUNCIL OF BERGEN COUNTY
HACKENSACK, NEW JERSEY

Since 1959, the Fair Housing Council of Bergen County has worked toward the elimination of discrimination in housing based upon race, creed, national origin, sex or marital status. The Council is the parent organization for fair housing committees that are active on a countywide and local basis. Services provided by the Council include housing counseling, financial guidance, discrimination investigation and legal assistance.

DESCRIPTION OF THE DEMONSTRATION
PROJECT

The project attempted to increase the number of minorities interested in housing in Bergen County by conducting a concentrated recruitment program encompassing techniques and messages designed to appeal to urban dwellers who were considering (or might consider) a move to the suburbs. They hoped to increase the number of clients who contacted the Council before or at the beginning of their housing search within the county. The clients attracted by this recruitment campaign were then included in an "early intervention" program designed to reduce the number and type of discriminatory activities engaged in by real estate agents and apartment managers when counseling clients about the range of housing opportunities that exists and about means of detecting restrictions of their access to these opportunities. Two major objectives were the focus of the demonstration project:

- Objective I: To increase the number of minorities from selected urban areas who contact the Fair Housing Council for assistance in seeking housing in Bergen County; of those registered as clients, to increase the percentage who contacted the Council at the beginning of their housing search.
- Objective II: To increase the housing opportunities for minority recruits through an "early intervention" program designed to expand housing options to minorities.

DEMONSTRATION PROJECT OUTCOMES

The number of minority contacts from the targeted areas increased during the project period over the comparable time period in the previous year by 46 percent. The recruitment campaign produced 157 respondents, of whom 109 (69 percent) were minorities. Analysis of project outcomes was based exclusively on the recruitment, counseling and housing search experiences of minority clients. The recruitment program increased the number of minority clients from outside New Jersey (the normal FHC outreach area) by 49 percent when compared to a similar intake period in 1977 (from 108 in 1977 to 217 in 1978). The campaign also attracted urban minorities in family units with incomes of more than \$15,000 per year. Two-thirds of the clients had combined family incomes of more than \$15,000 and more than half of the families had children; there were twice as many two-adult families as one-adult households. FHC was successful in reaching clients at the beginning of their housing search, as 85 percent of the minority respondents stated that they were just beginning their search for a home or apartment when they contacted the Council.

Project clients (all of whom received "early intervention" counseling) were shown more housing units per broker visit than a

comparable sample of minority FHC testers in a recent auditing program. Sixty percent of the homes shown to project clients were in nonintegrated neighborhoods. Almost twice as many units were seen by those clients who had contacted the Council at the beginning of their housing search than those who had already started looking.

Due to the short duration of the demonstration project, recruited clients could only be followed for four months--less than a typical housing search period. Although the duration of the housing search period was limited, eight moves (six apartment-renters and two homebuyers) were made to Bergen County by project clients, half of them to nonintegrated neighborhoods. The time constraints on the project, combined with the complex and cautious decision-making process involved in homebuying, limited the number of actual housing moves made by clients during the course of the project. Project staff felt that with continued outreach efforts, the number of fair housing moves by the recruited clients was potentially high.

MBA EVALUATION OF THE DEMONSTRATION PROJECT

The Fair Housing Council successfully developed and implemented a recruitment program to attract minority homesearchers to Bergen County. By reaching potential suburban residents at the beginning of their housing search and providing early intervention counseling to broaden the range of housing options and alert them to possible discriminatory practices, the Fair Housing Council demonstrated an innovative approach to increase housing opportunities for minorities.

Performance Factors

The project achieved a notable increase (46 percent) in the number of minorities from target areas contacting the Council for assistance in finding housing over the comparable time period in the previous year. The project hoped to increase the number of clients contacting the Council before encountering any discrimination and were successful in reaching 85 percent of the project clients at the beginning of their housing search. Comparable data from previous years were unavailable, making it impossible to measure the actual increase in the number of clients contacting the Council at the beginning of their housing search. However, the project staff stated that this percentage contrasts with the Council's normal experience and noted that during the initial telephone interviews of former FHC clients conducted in the market research phase of the project, only 12.5 percent reported they had contacted the Council at the beginning of their housing search. Only one project client had experienced discriminatory treatment prior to contacting the Council. Again, the project staff were unable to provide comparable data on discriminatory treatment in previous years, but commented that a "sizable number" (but not a majority) of people who came to the Council in previous years felt that they had encountered discrimination.

The project attempted to increase housing opportunities for minority homes seekers in nonintegrated areas of Bergen County. The number of recruited minority clients who actually visited Bergen County to look for housing and who contacted a real estate broker for assistance during the search was very low (17 of 109, or 16 percent), making it difficult

to assess the project's performance in this effort. Approximately 60 percent of the housing units shown to project clients were in nonintegrated neighborhoods, an increase over previous years. However, since the percentage is based on such a small number of clients, no definite conclusions can be reached regarding the achievement of this objective.

Process Factors

MBA examined two major process aspects of the demonstration: (1) the recruitment program used to attract potential minority home- and apartment-seekers from targeted areas to Bergen County and (2) the "early intervention" counseling program designed to broaden the range of housing options offered to minorities in nonintegrated areas.

Recruitment Program

Recruitment techniques were developed on the basis of information gathered during the preliminary market research effort conducted by the Council. This effort involved the completion of telephone interviews with 24 black Council clients active within the past two years, as well as a limited review of relevant literature on black consumerism. Selection of recruitment techniques was based entirely on the information gathered from the Council's own assessment of the Bergen County housing market.

The decision to develop the bulk of the recruitment program on the basis of a limited sample of former clients has questionable validity. A more accurate (and statistically valid) determination of black attitudes toward housing moves would have resulted from sampling from a larger universe. Recognizing this deficiency, the recruitment techniques

developed by the project experienced varying degrees of success in reaching the target population.

The most successful recruitment technique was the distribution of the brochure by direct mail and personal distribution by FHC members, which attracted 73 percent of the respondents to the Council. Newspaper advertisements attracted the remaining 27 percent. No clients came to the Council from the mailing to corporate relocation firms. The brochure distribution had an average cost-per-client response only half that of all newspaper advertising combined.

The project staff calculated that the average cost-per-client response was substantially higher for this project than for recruitment activities during the previous year. A total of \$4,400 was spent for recruitment in 1978; only \$1,550 was spent in 1977. The additional cost resulted in a 46 percent increase in the total number of clients and a 49 percent increase in the number of clients from outside Bergen County, perhaps justifying the increased expenditure. The long-term impact of the recruitment program is more difficult to assess. The brochure designed for the project will be circulated on a continuous basis and contacts within fraternal, professional and social organizations in the minority community established during the project will be further developed. These follow-up activities could positively impact future outreach efforts to minority urban residents by the Fair Housing Council and thereby enhance the value of the demonstration.

Early Intervention Program

FHC noted that project clients seemed to be encountering more discrimination (five instances of discrimination reported by the 44 active home- and apartment-seekers) than the average Council client as a result of their heightened awareness of discriminatory practices. Unfortunately, the Council does not have exact figures on the number of discrimination complaints filed by clients during a comparable time period in 1977 to compare with the number of complaints reported by project clients. Also, project staff were unable to assess and compare the effectiveness of specific actions in increasing housing opportunities. The effectiveness of the early intervention counseling program in broadening the range of housing options and in increasing awareness of discriminatory practices was not clearly demonstrated by this project. Further analysis of the impact of early intervention counseling is needed to determine the implications of initiating such a program on a widespread basis by other fair housing groups.

Resource Factors

Subcontract funds were used primarily for personnel costs; the remainder went to financing the recruitment campaign, local travel, telephone, postage and office supplies. The Fair Housing Council contributed office space and the services of the FHC legal staff, housing counselors and part-time secretary. The Council also provided in-kind resources to cover telephone costs and photocopy costs.

Volunteers were utilized in several project activities. The voluntary services of a local artist were used in designing the

recruitment brochure and the brochure was distributed by 75 members and friends of the Fair Housing Council. The preliminary market research and motivational research were completed through the donated time of a research sociologist.

Replicability Factors

The demonstration project made a good start in developing recruitment techniques that appealed to the target group and that could be replicated easily by other fair housing groups. Specific findings were produced in the following areas that may be useful to other fair housing groups:

- Motivations for minorities moving to suburban areas
- Comparison of the cost-effectiveness of various recruitment techniques
- Impact of early intervention counseling on the housing search experience

Recruitment techniques developed by the FHC can be adapted for use by any fair housing group at minimal cost. Although the Council relied upon an already established network of supporters and contacts, these same types of people exist in other areas and can be organized by fair housing groups.

SUFFOLK HOUSING SERVICES

LAKE GROVE, NEW YORK

Suffolk Housing Services (SHS), located in Suffolk County, Long Island, New York, is a nonprofit fair housing agency with two major goals: (1) to improve housing conditions of Suffolk County residents by providing the resources and expertise to alleviate their housing problems and (2) to make the housing market responsive to the needs of all people, regardless of race, creed, sex, age or income. The organization concentrates on three major activities: (1) individual counseling and assistance; (2) efforts to eliminate racial discrimination in the Suffolk housing market; and (3) efforts to expand the supply of housing for lower income citizens by promoting construction of publicly assisted housing.

DESCRIPTION OF THE DEMONSTRATION

Suffolk Housing Services wanted to test the hypothesis that landlords were more likely to agree to rent to low-income whites than to low-income blacks by comparing the housing secured by white welfare recipients and the terms under which they obtained it with the housing secured by black welfare families. During the period from January to November 1978, Suffolk Housing Services conducted a racial "audit" designed for public assistance recipients by carefully documenting the actual housing search experiences of white homeseekers and black home-seekers. The project was described by SHS staff as follows:

Welfare families are economically homogeneous, have identical financial resources to apply to housing and

must comply with uniform relocation procedures mandated by the Department of Social Services (DSS). At the end of the period we compared the experiences of groups of white and black families of the same size to assess patterns of different housing locations and conditions that can only be attributed to a difference in the race of the family group.

The homeseeking experiences of 275 families in Suffolk County over an 11-month period were followed by SHS to document evidence of racial discrimination. It was anticipated that results would show a pattern of different treatment according to race.

DEMONSTRATION PROJECT OUTCOMES

Between January and November 1978, 220 audit cases were opened by Suffolk Housing Services staff. The opened cases consisted of 87 black families and 133 white families. The final audit analysis was based on the closed cases of 75 families, 46 white and 29 black.

To determine the type of housing obtained by the 75 audit families and differences between the results for black and white families, the following variables were analyzed:

- Racial composition of neighborhood
- Housing condition
- Terms under which housing was secured
- Amount of rent
- Referral source

Audit families with closed cases were grouped by size of the household. This variable was chosen because family size directly correlated with housing needs and available resources to obtain housing. Black and white families were examined within each family size category.

Comparable distributions of families in the same size category allowed realistic comparisons to be made between black and white families.

Significant differences in housing secured between the family groups in the same size category were identified and analyzed; differences not attributable to race were not included. Audit results were first tabulated and analyzed for both races in each size category (from two-person families to eight-person families). Then the results were tabulated for all white families and all black families (regardless of family size).

The project staff concluded that the audit results clearly show the discriminatory effects of DSS-required terms of rental. The strict requirements and inadequate shelter allowance level lead families on public assistance to falsify information to secure housing. This is evidenced by the fact that one-third of both races submit incorrect information on the DSS housing form because the allowance is too low for the Suffolk housing market. Project staff stated that this situation disproportionately affects black families as they are less likely to find cooperative landlords. When they do find cooperative landlords, it is more likely to be in black neighborhoods.

In summary, there are four types of situations the majority of audit families encountered, black or white:

1. Real estate broker cooperation was needed to either accept \$100 fee (maximum DSS) or to verify a false fee.

2. Garden apartment management cooperation was needed to verify false rent or false security requirements.
3. Landlord cooperation was needed to verify a false amount of rent.
4. Housing had to be found by personal referral.

The project staff determined that one or more of these occurred in 54 of the 75 relocations by all audit families. Except in the factor that black families rely heavily on word-of-mouth referrals from friends and family members, each of the other three factors required an agreement by a broker, a manager or a landlord to falsify information. Project staff concluded that these factors, while making it difficult for low-income whites to obtain housing, has an even more negative effect on minorities. It was maintained that brokers, managers and landlords refused to falsify information for blacks when, under similar circumstances, they would agree to do it for whites.

MBA EVALUATION OF THE DEMONSTRATION PROJECT

Although Department of Social Services' policies appear to have a greater adverse effect on black families than white families, Suffolk Housing Services was unable to document specific discriminatory acts. The results of the project showed that all welfare families in Suffolk County, regardless of race, face difficulties in obtaining housing.

Performance Factors

The Department of Social Services, by restricting the amounts to be spent on housing and limiting brokers' fees and security deposits,

forced welfare families to resort to falsifying information on their applications for housing assistance. Since all families were subjected to the same restrictions, SHS had to rely primarily on the apparent degree of landlord or broker cooperation with homeseekers in falsifying information to show differences in the treatment of black welfare and white welfare families. The exception was an attempt by SHS to conduct a traditional audit of ten real estate brokers through which white audit families had found housing during the first half of the project. A white SHS staff person called in response to newspaper ads of housing and was told in each case that units were available and welfare families were accepted. When three black audit families were sent by SHS to the brokers on that same day, they were told there was nothing available for welfare recipients. This test clearly shows discriminatory practices by brokers; however, again it was impossible to actually prove discrimination.

Process Factors

MBA examined six major process aspects of the demonstration: (1) selection criteria for audit participants; (2) referral procedures used to direct homeseekers to housing; (3) process used to assess housing conditions of audit families; (4) process for matching families for analytical purposes; (5) procedures for analyzing discriminatory practices; and (6) procedures used to assess differences in experiences of white and minority homeseekers.

Selection Process

All families in the audit required the participation of the Department of Social Services in order to move. This criterion was chosen by project staff to ensure uniformity in the relocation process for all families participating in the audit. This characteristic ensured that all families included in the project were of identical financial status, thus eliminating the variable of income when comparing the homeseeking experience of black and white families. This criterion was valid given the objective of the audit.

Referral Procedures

The number of referrals was limited by the tight housing market existing in Suffolk County. Project staff concluded that the audit results were not as dependent on SHS referrals as they had originally thought, since only limited assistance on housing opportunities could be given to audit participants (due to the tight housing market). SHS was often unable to provide specific housing sources and instead referred participants to newspapers, catalogues, etc. DSS referrals were also limited, although ten families were able to obtain housing through DSS referrals to landlords or real estate brokers.

The same referrals and information were given to all families, regardless of race. White and minority families were sent to housing without regard to racial composition of the area (this includes sending black families to predominantly black areas and white families to predominantly white areas, as well as sending families to integrated areas.) The emphasis of the project was to find housing for low-income families

as opposed to emphasizing fair housing moves. Project staff frequently referred black welfare families to housing in which they had a good chance of being accepted (black or integrated developments) rather than to white developments which might reject such families based on race.

Project staff concluded that white families were better able to "use the market" than black families and had better access to real estate brokers and private landlords. They maintained, however, that although white and minority homeseekers were forced to pursue different options, the SHS referral process was equitable to all families, regardless of race. Variations in results between the races came when homeseekers were forced to use their own resources since the tight housing market limited the amount of assistance offered by SHS. The selection of segregated neighborhoods by project participants was inevitable based on scarcity of housing.

Assessment of Housing Conditions

Housing condition was rated good, fair or poor by the audit specialist using loosely defined criteria established by the project. The procedures for determining housing condition did not employ sophisticated techniques; however, they were deemed adequate for this project. Data on comparisons in the condition of the old and new housing secured by audit families were not reported by project staff, limiting the usefulness of the assessment.

Process for Matching Families

Audit families with closed cases were grouped by size of the household (two-person through eight-person families). This variable

was chosen by project staff because family size directly correlated with housing needs and available resources to obtain housing. This process was valid for matching families for analytical purposes when comparable distributions of families in the same size category existed. However, the small number of five-person and eight-person families of both races prevented extensive comparisons in those categories. The matching process could have been more effective if alternative methods of grouping families had been devised to allow all audit families to be included in the analysis.

Analysis of Discriminatory Practices

To determine discriminatory practices, project staff monitored the way in which the housing unit was obtained and the relationship between the client and the Department of Social Services. This allowed an assessment of different financial arrangements and procedures required for black and white families by landlords, brokers or DSS. Project staff defined discriminatory practices as those practices occurring when unequal treatment was given to white and black welfare families by real estate brokers and landlords. The project examined the issue of whether landlords or brokers were more willing to cooperate with white welfare families in verifying false terms on DSS forms. They maintained that it was more difficult for a minority family to receive cooperation from brokers and landlords in illegally verifying false information on DSS forms and that this practice constituted discrimination since it placed minorities at a distinct disadvantage in the housing market.

Although the project staff maintained that the audit results showed discrimination against black welfare families in search of housing, for the most part, these discriminatory acts were very subtle and not liable to substantiation.

Assessment of Differences in Homeseeking Experiences

SHS was unable to document specific discriminatory acts. They were able to show unequivocally that DSS policies on brokers' fees, security deposits and shelter allowance maximums need to be changed to reflect realistically market conditions in Suffolk County.

SHS provided documentation of a classic case of systematic discrimination but not of unique and specific individual acts of discrimination. In Suffolk County, the wide-ranging effect of public policy on all low-income families, black and white, constitutes a form of economic discrimination which might perpetuate a more subtle form of racial discrimination.

The innovative technique tested by the demonstration to prove discrimination against minority welfare families should have been supplemented by a more traditional racial audit to support more clearly alleged discriminatory practices. The conclusion reached by the project staff that the audit results showed widespread discrimination against black welfare families in search of housing is not valid; instead they showed that all welfare families in Suffolk County face difficulties in obtaining housing.

Resource Factors

Subcontract funds were used primarily for salaries (full-time audit specialist, part-time project director and part-time secretary) and fringe benefits; minimal expenditures were made for direct cost items. Office space, telephone and other miscellaneous costs were absorbed by Suffolk Housing Services.

SHS contributed the time and resources of its housing counselors for the initial client intake phase of the project. The counselors completed intake forms with relevant information about the families' housing needs and provided leads on current housing vacancies before turning the case over to the audit specialist. Time was also contributed by a CETA employee who compiled listings of available rental properties. The project utilized several volunteers in conducting field work with the audit specialist, consisting primarily of intake visits to audit families.

Replicability Factors

Suffolk County is typical of many suburban areas--housing market conditions are extremely tight, with an extremely low vacancy rate on rental units. The vast majority of rental units in Suffolk County are single-family houses or apartments in divided houses and above stores. Most of these units are available only through real estate brokers. Suffolk County has very few publicly assisted housing units and most that do exist are reserved for occupancy by elderly tenants. SHS estimated that there are only between 100 to 135 public housing units for families in Suffolk County and vacancies in these units are rare.

The conditions of the low-income housing market in Suffolk County can be found throughout the country. Therefore, this type of project can be replicated easily by other fair housing groups with only limited modifications.

The project staff suggested that fair housing groups not regularly contacted by low-income families can carry out the audit together with an anti-poverty agency in their area. The experience of SHS led project staff to recommend the use of a small sample of home-seekers with close documentation by an audit specialist, in order that the number of completed cases and the amount of contact with the client could be increased. An alternative solution suggested by project staff was the use of two auditors, one to provide housing leads and maintain contact, while the other visited families on an ongoing basis.

For groups that want to document discrimination at the institutional level, the approach used by SHS can be replicated easily. However, in order to more clearly support alleged discriminatory practice against minority welfare families, a more traditional racial audit should supplement the SHS approach.

HOUSING ASSOCIATION OF DELAWARE VALLEY
PHILADELPHIA, PENNSYLVANIA

The Housing Association of Delaware Valley (ADV) is a nonprofit organization and the oldest citizens' housing group in the country. In its efforts to effect fair housing in the city of Philadelphia, HADV has worked closely with the Ad Hoc Committee for Housing and Community Development--a coalition of several housing and community groups (including HADV) with the primary goal of improving housing conditions for the poor in Philadelphia. This coalition has become the number one adversary in Philadelphia against the continuing problems of housing discrimination and the lack of equal housing opportunity. In cooperation with the committee, HADV conducted a demonstration to improve the city's performance in relation to its assisted housing goals.

DESCRIPTION OF DEMONSTRATION

For the demonstration project, HADV proposed to investigate and analyze the manner in which fair housing programs serve low- and moderate-income families. Using information obtained through monitoring and data collection efforts, the project worked with its affiliate members of the Ad Hoc Committee to develop and employ strategies designed to increase goal achievement in four selected housing assistance programs.

As its primary objective, HADV specifically proposed to increase the level of goal achievement in Year IV of Philadelphia's CDBG Housing Assistance Plan. The group hoped to increase the number of existing

housing units (including new and rehabilitated units) available to low-and moderate-income and minority families, and to increase the benefits received by such families under the following programs:

- Urban Homesteading Program--to determine the degree to which minorities and low- to moderate-income families benefitted from the program
- Gift Property Program--to determine if there has been discrimination against low- and moderate-income and minority applicants, and to determine to what extent these groups have been beneficiaries of the program
- Section 8 Rent Sudsy Program--to determine the characteristics of families placed in Section 8 units and to determine the characteristics of families placed in impacted and nonimpacted areas
- CDBG Loan and Grant Program--to determine whether expenditures are consistent with CDBG rules and regulations as they pertain to minorities and low- and moderate-income persons

In an effort to achieve its overall objective, HADV conducted the following major activities related to Years III and IV of the Philadelphia community development program:

- Collected data on the activities of the four housing programs and assessed progress toward goals and identified problem areas and barriers relating to participation by low- and moderate-income families and minorities
- Reviewed results of Year III to determine strategies for impact on Year IV goal achievement
- Implemented the strategies to increase the level of goal achievement in the targeted programs and to increase benefits to low-income and minority families under the programs

DEMONSTRATION PROJECT OUTCOMES

HADV expressed frustration at its experiences in dealing with the city and what it believed was a poorly structured and managed community development bureaucracy. HADV concluded:

- None of the four programs examined during the course of the demonstration showed any evidence of increase in benefits to low- and moderate-income families.
- Additional funding channeled into the overall community development program may not be spent.

HADV believed the demonstration did achieve some results, although the final impact on Year IV goal achievement was unknown at the close of the demonstration period. One positive result noted was a well-informed network of community groups has developed community support to articulate and advocate for the housing needs of its constituents. This network plans to continue to work to improve the housing situation in the low- and moderate-income residents of Philadelphia.

MBA EVALUATION OF THE DEMONSTRATION PROJECT

Efforts by the HADV demonstration project can be broken down into two basic objectives: (1) to increase the level of goal achievement in the city's housing assistance programs and (2) to increase participation by and benefits to low- and moderate-income and minority persons from the housing assistance programs. These efforts and the approaches used to achieve demonstration objectives are evaluated below.

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Monitoring Activities

Project staff attended, at a minimum, two meetings per month and collected data from the City Council, the Vacant Property Review Committee, the Public Housing Authority Board, the Citizens Advisory Committee and the Redevelopment Authority. Using the information obtained through these activities along with other data collection and documentation efforts, HADV and the Ad Hoc Committee attempted to communicate with the various agencies the degree of response of their housing programs to the needs of low- and moderate-income and minority persons. These attempts proved largely unsuccessful. Neither the continual presence of HADV and the Ad Hoc Committee at these meetings nor their contact with program operators produced noteworthy results in increasing housing assistance plan goals.

Working in Coalition

Working with other organizations, HADV was able to broaden both its scope and its impact. The Ad Hoc Committee was not a new entity developed for purposes of this demonstration, but a group that had been working together for some time to advocate the improvement of housing conditions for low-income families. It was a natural progression to include this group in the demonstration.

It is important to stress the reputation of the Ad Hoc Committee as a force for fair housing activities in the city. Its history of militant confrontation with city officials and agencies created almost automatic resistance from many individuals who had authority to implement change. Despite this reputation for being opponents of the system, HADV was

able to garner the support of other groups in the city not formerly aligned with the Ad Hoc Committee. This factor, along with the persistence of HADV in its use of confrontation politics, appears to have resulted in the one major outcome of the demonstration--allocation of five times more money to the target area.

Strategies for Change

HADV and the Ad Hoc Committee collected and analyzed data on the patterns operations and expenditures in the subject community development programs. This was an essential element of the demonstration approach because documentation of patterns and practices was needed to present their case to city and federal officials. Using the information they had obtained, Committee members testified at public neighborhood hearings, City Council hearings and at the area, regional and national levels of HUD, presenting their findings that CD funds were not being used as mandated by law.

These efforts achieved no results, so the project proceeded to use the tactics of demonstration and confrontation. They instigated a civil rights investigation by HUD and were instrumental in the implementation of several local investigations. However, minimal success was achieved in the overall effort to improve housing conditions.

One activity that stands out in the effort to generate a positive response from city officials was a boycott of "The Gallery" shopping mall. This activity, as traditionally has been the case when economic threats are employed, generated the most publicity and public support.

MBA concludes the most influential factor leading to the reallocation of funds was HUD's concurrence that the city was not in compliance with the CDBG regulations. It cannot be stated whether HUD would have taken action without the prodding of the Ad Hoc Committee.

Resource Factors

Approximately 85 percent of the total demonstration budget of \$25,000 was expended on staff salaries with the remainder spent on office space, supplies, telephones and related direct costs. HADV made an in-kind contribution of approximately \$2,000, while all services and participation by the Ad Hoc Committee were contributed.

Replicability Factors

In any city where the rehabilitation/displacement syndrome is operating, an organization attempting to affect public policy to improve benefits to low- and moderate-income families is likely to be confronted with certain economic realities. Public policy often is locked into a necessary alliance with private investment. In such a climate, private fair housing and other interested groups have a role to play in ensuring equitable treatment of the victims of urban reinvestment--the poor and minorities who inhabit inner city areas. Based on the experiences of the Philadelphia demonstration, any group interested in advocating for increased housing benefits to these populations probably will encounter resistance, although not necessarily to the degree experienced in Philadelphia.

The pivot around which this demonstration resolved was the use of a coalition of organizations, rather than sole reliance on the funded

organization. The groups which made up the Ad Hoc Committee represented a broad range of ethnic, racial, educational and vocational perspectives based on the backgrounds, interests, constituencies and geographical locations of the members of the organizations. The diversity of these perspectives seemed to add legitimacy, leverage and impact to their efforts. The message of the coalition was that the basic problem was common to a number of areas and situations and not just a minority problem. Use of the Coalition provided the demonstration with a wider latitude to address issues and attain greater access to public officials.

The use of coalition politics to deal in political confrontation in Philadelphia generated a good deal of public notice. If the objective of a group is to heighten public awareness of the issues and problems related to housing assistance programs and fair housing, it is safe to say that these tactics do arouse attention. However, whether this approach is the best way to achieve objectives or positive outcomes is still open to debate.

ORANGE COUNTY FAIR HOUSING COUNCIL

SANTA ANA, CALIFORNIA

The Fair Housing Council of Orange County, California, is an advocacy group working to improve the availability and quality of housing. This demonstration project developed and tested the effectiveness of two low-cost audiovisual filmstrips and fair housing brochures to increase public awareness of U.S. fair housing laws.

DESCRIPTION OF THE DEMONSTRATION PROJECT

Through the use of audiovisual materials, Orange County Fair Housing Council (OCFHC) attempted to increase public awareness of fair housing laws and the problems people encounter because of housing discrimination. Their approach to increasing awareness was through the design and presentation of two types of audiovisuals and the distribution of brochures on fair housing. The specific objectives of the demonstration were:

- Objective I: To develop and produce a master audiovisual show entitled "Housing Discrimination" in the format of a two- and an eight-minute synchronized filmstrip and a supplemental brochure which are both inexpensive and present a universal message on U.S. fair housing laws
- Objective II: To expose 200,000 members of the general public to U.S. fair housing laws which prohibit discrimination
- Objective III: To make 15 presentations per month of the eight-minute film before selected target groups including the real estate industry, financial institutions, corporations, local governments, educational institutions and private fair housing groups

DEMONSTRATION PROJECT OUTCOMES

The project aimed to expose 200,000 persons to fair housing laws and the two-minute audiovisual was selected as the proper vehicle. To test the use of film in high pedestrian situations, the shorter version of the audiovisual was displayed at the Orange County Fair and the Latin Fair. OCFHC reported more than 120,000 persons saw the film. It also was exhibited at a Community Awareness Day at a local college where OCFHC estimated that 1,200 students viewed it. In total, OCFHC estimated that 124,000 individuals were exposed to the two-minute film. It was documented that 949 persons who saw the film contacted OCFHC as a result. It was concluded that fairs and conventions were the most effective means of educating sizable numbers with the two-minute, continuously displayed audiovisual.

The eight-minute filmstrip was designed to be shown to smaller audiences in a group setting, such as a meeting or classroom, to supplement a verbal presentation about fair housing. Seven target populations were given presentations that were tailored to the groups' interests and functions as they related to fair housing:

- The real estate industry
- Financial institutions
- Corporations
- Local county governments
- Educational institutions
- Private fair housing groups

More than 100 groups (approximately 16,000 people) saw the eight-minute audiovisual. The longer version was found to be best suited to

train testers, orient citizens, make presentations to city councils and
and to educate students in an academic setting.

MBA EVALUATION OF THE DEMONSTRATION PROJECT

Evaluation of the Orange County demonstration project focused on
the effectiveness of the two types of audiovisuals in teaching different
audiences about fair housing.

Performance Factors

Performance was measured by the number of persons exposed to the
two films. Goals had been established for showing the film to 200,000
persons in public places and to 15 groups per month. OCFHC estimated
140,000 persons were exposed to one or both of the films:

- More than 124,000 individuals viewed the two-minute
film at public places.
- More than 100 groups saw the eight-minute
audiovisual at meetings.

As a result of viewing the two-minute film, nearly 1,000 persons contacted
OCFHC either requesting information or services, or offering to volunteer
for OCFHC activities. After viewing the eight-minute version, many
organizations offered to participate in fair housing programs and activi-
ties, and several government agencies offered contracts to OCFHC to
provide fair housing services.

Process Factors

Only one process element is pertinent: the approaches used to test the effectiveness of the audiovisuals with the public and selected audiences.

With the shorter film, the measure of effectiveness was the degree of interest generated by the film, resulting in viewer contacts to OCFHC. Using this indicator, MBA concludes that the two-minute film in high traffic areas resulted in the most contacts, and showing the film in social service agencies resulted in numerous referrals from caseworkers.

The effectiveness of the longer film varied with different groups. MBA believes with a change in "voice over" and perhaps some minimal visual modifications, the audiovisuals could be adapted economically for optimal effectiveness with several different audiences.

Only one group of viewers received tests--students--and results of pre- and post-testing showed no significant change in knowledge level before and after the presentation. If the tests had been given to other groups, it is possible that this finding would have been different. Also, this evaluation did not take into consideration the reliability of the test instruments.

Resource Factors

This subcontract was for \$25,000 with a contribution by OCFHC of more than \$9,000 in staff time, telephone expenses and postage. No outside in-kind resources were generated.

The cost of producing the two films was less than \$10,000. Income generated by showing the films was \$137,000. Therefore, use of such audiovisuals can be extremely cost-effective.

Replicability Factors

In their present forms, the audiovisuals can be used by any group interested in educating consumers about their rights to equal housing. Therefore, the films are directly transferable, since they address federal laws rather than state and local statutes. While groups could purchase a film such as the one produced by OCFHC, having a film geared to a specific geographic area could pay for itself in terms of increased clientele and additional funding.

METROPOLITAN WASHINGTON PLANNING AND HOUSING ASSOCIATION
WASHINGTON, D.C.

Metropolitan Washington Planning and Housing Association (MMPHA) has conducted research over the past seven years into the use and effects of display advertising by housing developers in the Washington, D.C., metropolitan area. This demonstration project conducted activities designed to increase use of the equal housing opportunity (EHO) logo and statement and the use of minority models by advertisers in Washington's two major newspapers.

DESCRIPTION OF THE DEMONSTRATION
PROJECT

The project combined both research and action components relating to the equal opportunity aspects of housing advertising, focusing on display advertisements (rather than classified ads) of new housing in the two daily newspapers in Washington, D.C. Particular emphasis was placed on the Spring and Fall "Festival of Homes"--major two-week advertising efforts by the real estate sales industry during peak periods of the homebuying season.

The research component of the project focused on the use of the HUD-approved equal housing opportunity logo and the use of white and nonwhite human models in ads with pictorial displays. The action component of the project consisted of a series of seminars on affirmative advertising techniques conducted by MMPHA for representatives from the real estate industry. These seminars were conducted to heighten awareness among advertisers of the subtle and implicit

discriminatory messages often conveyed through display advertising and to convince them to modify their advertising practices to ensure fairness. The major objective of the project was as follows:

To increase adherence to advertising guidelines and Title VIII of the Civil Rights Act of 1968, as it relates to advertising for new and rehabilitated housing through use of display ads in newspapers, to include: (1) an increase in use of the EHO logo in from 70 percent in 1975 to 100 percent of all housing display advertisements and (2) an increase in use of minorities in housing display ads.

DEMONSTRATION PROJECT OUTCOMES

In 1978, nearly three-fourths of all ads monitored used the complete EHO logo and, of significance to the project, there was an increase in the use of the logo between 1977 and spring 1978, from 63 percent in 1977 to 74 percent in the spring of 1978. Although the rate of use decreased to 72 percent in the fall of 1978, it was still an improvement over the 1977 rate (see the following table).

USE, NONUSE AND PARTIAL USE OF EHO LOGO:
1975, 1977 and 1978

Year	Percent of Ads With No Logo	Percent of Ads With Logo	Percent of Ads With Partial Logo
1975	30	70	*
1977	29	63	8
Spring 1978	17	74	8
Fall 1978	21	72	7

*In 1975, ads using a partial logo were counted as ads that used the complete logo.

Because only a portion of the ads monitored used models, the extent of "illegal" model use was measured in two ways: (1) violation

rate is the percent of ads (with models) that used models "illegally" and (2) the frequency rate is the percent of all ads that used models "illegally."¹ Between 1975 and 1978, the proportion of ads using models was consistently about 20 percent. The violation rate was 91 percent in 1977 and declined to 82 percent in spring 1978 monitoring results, but then increased to its highest point--92 percent--in the fall of 1978. The frequency rate displayed only minimal changes from 1977 through 1978 (see the following table).

LEGAL AND ILLEGAL USE OF MODELS:
1975, 1977 and 1978

Year	Percent of Ads with Models	Percent of Legal Model Use	Percent of Illegal Model Use (Violation Rate)	Frequency Rate
1975	18	12	88	16
1977	21	9	91	19
Spring 1978	22	18	82	18
Fall 1978	22	8	92	20

The project staff felt that the affirmative advertising seminars were useful to disseminate information on fair advertising techniques; however, the impact of the seminars was limited by the low participation rates of area developers/advertisers. In addition, many developers voiced

¹MWPHA believes that the use of models of only one race in a display ad is a violation of Title VIII and subject to penalties provided in the Fair Housing Act. This opinion resulted in the use of the terms "legal" and "illegal" by MWPHA to describe, for example, use of models either of both races or of no discernible race vs. use of models of one race only. It is important to note that to date no court has ruled on the precise question of which uses of models violate the law and MWPHA used its own interpretation.

a reluctance to be "the first and/or only one" to use minority models in their advertisements and pointed to the lack of data to substantiate the MWPNA claim that the use of minority models was an effective method of promoting its housing developments. Project staff concluded that there was a need for periodic follow-up with developers to keep the issue alive and felt that personal contact was the key to getting advertisers to change their patterns.

MBA EVALUATION OF THE DEMONSTRATION PROJECT

The impact of the project activities on changes in the rate of EHO logo use and minority model use in housing display advertisements appeared to be minimal. During the course of the demonstration project, logo use improved only marginally and minority model use showed no improvement. Although the project developed an innovative approach to promote affirmative advertising practices, no actual changes in advertising practices resulted. The credibility of MWPNA's basic hypothesis that advertising practices influence where minorities seek housing was not established. Further research into the influence of advertising on equal housing opportunities is recommended before the implementation of similar activities on a widespread basis by other fair housing groups.

Performance Factors

The project was marginally successful in achieving the objective of increasing the number of display advertisements using the EHO logo and statement between 1977 and 1978. The increase was minimal, with the logo appearing in 63 percent of all advertisements in 1977 and in an

average of 73 percent of all advertisements in 1978. At the beginning of the demonstration, project staff had hoped to increase the use of the EHO logo in from 70 percent to 100 percent of all housing display advertisements.

Between 1975 and 1978, the proportion of ads using models was consistently about 20 percent. There was no increase in the number of ads using both white and minority models by area developers/advertisers between 1977 and 1978.

Process Factors

MBA examined four major process aspects of the demonstration: (1) the research approach used to identify implicit "steering" in advertising, (2) use of seminars for developers and advertisers to advocate for fair advertising, (3) the process used to monitor real estate sections of newspapers, and (4) the use of influential organizations to promote use of EHO logo and minority models and to provide assistance to developers and advertisers.

Racial "Steering" in Advertising

MWPHA believes that housing advertisements can convey, in a variety of ways that range from explicit to subtle, that housing is being marketed only to white persons (or, in certain instances, only to minorities). The use of white models and certain catch words or phrases in ads such as "private community" or "exclusive neighborhood" may have the effect of steering minority homeseekers away from certain developments, while the phrases "equal opportunity rental" or "integrated" cue

minority homeseekers that the housing may be available to them. Project staff was unable to support their claims with data regarding the buying patterns among whites and minorities in specific housing developments. They were unable to show correlation between advertising practices and buying patterns and offered no concrete evidence that advertising practices actually do influence where minorities seek housing. Further research is needed to provide more information on the impact of advertising on the homebuying decisions of whites and minorities.

Use of Seminars to Advocate
for Fair Advertising

The project staff felt that the seminars were useful for disseminating information on fair advertising techniques; however, the impact of the seminars was limited by the low participation rates of area developers/advertisers. Those developers who did attend were unwilling to make commitments to promote the concept of equal access to housing through modifications to their advertising practices and remained unconvinced that the use of minority models was an effective method to promote their housing developments. Since MWPNA was unable to substantiate its claim of a correlation between advertising practices and buying patterns, developers and advertisers were skeptical about the validity of their arguments. Although the seminars provided the opportunity for dialogue between fair housing activists and developers, no changes in the use of EHO logos and minority models can be attributed to the seminars.

Monitoring Real Estate Advertisements

It could not be determined whether the monitoring of display ads during two intensive advertising periods produced an accurate picture of fair advertising practices, since it was impossible to ascertain whether "festival" advertising practices represented typical examples of display advertising.

Working with Influential Organizations

A number of outside organizations participated in various aspects of project activities. One organization approached by MWPHA refused to assist the project and both The Washington Post and The Washington Star were unwilling to act as cosponsors of the affirmative advertising seminars. Real estate editors of both newspapers felt that highly visible involvement in such an effort might be misinterpreted and jeopardize revenues from advertisers. The Post did provide a great deal of assistance with the seminar booklet and sent advertising representatives to the seminars; the Star refused to participate, stating they would not take the position of trying to influence advertisers.

The participation of outside organizations had no direct effect on the advertising practices of developers. The participation of several of the organizations (particularly The Washington Post and the Council of Governments) did help to "legitimize" the seminars.

Resource Factors

Subcontract funds were used primarily for personnel costs (one full-time project director) with the remainder used for publications and

seminar arrangements. MWPRA contributed office space and equipment, personnel time (assistant project director), fringe benefits and administrative overhead costs.

An extensive amount of assistance from outside organizations was also provided. The Washington Post assisted in developing advertising graphics and the Council of Governments contributed personnel time and financial resources for the affirmative advertising booklet used at the seminars. In addition, the models used in the affirmative advertising booklet were volunteers.

Replicability Factors

MBA examined three major replicability aspects of the demonstration: (1) housing patterns and housing market conditions; (2) precedent for use of logo and minority models; and (3) cost of developing display ads with models.

Housing Patterns and Market Conditions

In many metropolitan areas, including Chicago, Philadelphia, Boston, Atlanta and Los Angeles, the percentage of suburban household growth has been greater for blacks than for whites (although the numerical increase for whites has been larger). Although the Washington black population is larger and more affluent than most other areas, similar trends towards black suburbanization can be seen all over the country. Steering practices identified by this project can also be found in all major metropolitan areas. Therefore, other fair housing groups could

easily replicate this project and apply the materials and procedures developed by MWPHA to their own communities.

Precedent for Use of Logo and Minority Models

The use of the EHO logo was fairly widespread prior to the MWPHA project. Usage was increased an additional ten percent during the course of the project (to 73 percent). Apparently, area developers and builders feel comfortable using the logo and it has become a fairly common practice, unlike the use of minority or integrated models. EHO logo use is unusually high in the Washington metropolitan area compared to other areas. Although the use of minority models remains low in the Washington area, it is still higher than the usage in most other areas. The concept of "safety in numbers" definitely affects the willingness of developers and advertisers to use minority models and the EHO logo. Fair housing groups attempting to change advertising practices in other areas might face more resistance to their efforts than MWPHA.

Cost of Developing Display Ads with Models

Developers insist that the major factor in their decision to not use models involves the need for housing ads to emphasize the product and the location. They claimed that people are interested in three pieces of information in an advertisement: picture of house or floor plan, the price and the location. These elements are seen as essential for inclusion in any display ads; models are considered "extras" that do not sell the product. Since most advertising budgets are limited, developers leave out "nonessential" information--and that usually includes models.

Most felt that the EHO logo was sufficient to indicate nondiscrimination. Developers pointed to the lack of data to substantiate the MWPHA claim that the use of minority models was an effective method to promote their housing developments. Developers and advertisers also cited the cost of developing and running display ads with models as an important factor in the decision to use or not use models in display advertisements.

MBA concludes that in areas other than Washington, D.C., activities to increase EHO logo usage in display advertising might meet with a greater measure of success. With usage already extraordinarily high, the impact of such activities is not as discernible as in other large cities. Therefore, in areas where including the EHO logo is not common, PFHG efforts could produce more significant increases in fair advertising practices.

CHAPTER III

SUMMARY FINDINGS AND CONCLUSIONS OF THE DEMONSTRATION PROJECTS

To assess the effectiveness of the various affirmative fair housing techniques implemented by the demonstration projects, selected project variables have been grouped and examined to determine similarities and differences in activities and outcomes. Projects have been grouped under three categories: (1) the approach, (2) the type of resources applied and (3) the target group. Many of the projects are subject to analysis into more than one of the categories, depending upon the objectives addressed by the demonstration projects. Major differences in approaches, outcomes and effective use of resources are discussed in this section. Recommendations for future implementation and replicability of the activities carried out by the PFHGs have been developed based on the individual evaluations and these comparisons. The information should prove useful to private fair housing groups seeking effective techniques to use in their own communities.

DEMONSTRATION APPROACHES

Exhibit 1 groups the projects under the overall approaches that were the main thrust of demonstration activities. Five approaches were identified: (1) using marketing/outreach techniques, (2) monitoring community development block grant activities, (3) using general education techniques, (4) seeking to educate specific target groups and (5) providing housing referrals and/or discrimination counseling designed to increase housing opportunities in the community. Appropriate parallels and distinctions are discussed below.

EXHIBIT 1
APPROACHES OF THE PROJECTS

	Marketing/ Outreach	CDBG Monitoring	General Education	Targeted Education	Housing Referrals/ Discrimination Counseling
Fair Housing Center of Home Investments Fund Chicago, Illinois	X				X
Metropolitan Washington Planning and Housing Association Washington, D.C.				X	
Fair Housing Council of Bergen County Hackensack, New Jersey	X				X
Housing Opportunities Made Equal Buffalo, New York				X	
Coalition for Block Grant Compliance Detroit, Michigan		X			
Orange County Fair Housing Council Santa Ana, California	X		X	X	
Fair Housing for the Handicapped Des Moines, Iowa			X	X	X
Housing Association of Delaware Valley Philadelphia, Pennsylvania		X			
Suffolk Housing Services Lake Grove, New York					X

Marketing/Outreach

Three demonstration projects focused on marketing and outreach:

- (1) Fair Housing Center of Home Investments Fund (Chicago, Illinois),
- (2) Fair Housing Council of Bergen County (Hackensack, New Jersey) and
- (3) Orange County Fair Housing Council (Santa Ana, California).

The Chicago and Bergen County projects both emphasized marketing programs designed to increase the number of clients the organizations served and increase the percentage of tenants and homeowners moving into nondiscriminatory housing. The Bergen County project involved a concentrated recruitment program in several selected New York City neighborhoods and selected urban areas in the country. These recruitment efforts were combined with early intervention counseling to alert clients to discriminatory practices among real estate sales agents and apartment managers. The Chicago project implemented a comprehensive multimedia program involving the entire metropolitan area, with the primary objective to increase the cost-effectiveness of their public relations effort.

Unlike these two recruitment-oriented projects, the Orange County demonstration focused on increasing general public awareness of fair housing laws. Rather than specifically marketing its own services and seeking clients, the Orange County project attempted to expose the general public and members of selected target groups to fair housing laws and concepts.

All three projects developed several marketing and outreach strategies to test and compare the effectiveness of different approaches

and media. The Chicago and Bergen County projects both increased their client populations, but they were less successful in generating fair housing moves. In both cases this was attributed to the short duration of the demonstration, each group claiming that an additional four to six months of observations would be required to get a more accurate indication of the number of moves resulting from project efforts.

CDBG Monitoring

Both the Coalition for Block Grant Compliance in Detroit and the Housing Association of Delaware Valley in Philadelphia focused their demonstrations on monitoring the use and allocation of Community Development Block Grant funds. In Detroit, monitoring activities were implemented by a "citizen-based" system of volunteer teams. The Philadelphia project used a coalition of community-based housing and community groups for their monitoring effort. A comparison of these approaches shows the confrontation and adversarial tactics with public officials employed in Philadelphia were far less effective in bringing about change than the more cooperative strategies used in Detroit. While no definite conclusions can be reached, one factor was an important variable in both cases--the support and cooperation of the HUD Area Office to get cities to comply with CDBG requirements. This was particularly true when assisted housing or fair housing was an issue.

General Education vs. Targeted Education

Public education was a primary objective for some projects; for others it was a related subgoal. Two projects focused on educating

specific target groups such as public officials or real estate developers and two projects combined targeted education objectives with an attempt to increase general public awareness.

The Orange County and Des Moines projects combined the education of the general public with the education of specific target groups to carry out project demonstrations. The Des Moines project (Fair Housing for the Handicapped) developed numerous activities to generate public awareness of the housing problems of the handicapped while concurrently focusing on outreach to three specific target groups of handicapped persons. Similarly, the Orange County project developed and implemented an audiovisual presentation to educate the general public on fair housing issues in addition to identifying seven target populations for educational efforts.

Metropolitan Washington Planning and Housing Association (Washington, D.C.) had a primary objective of disseminating information on fair advertising techniques to real estate developers and advertisers. Housing Opportunities Made Equal (HOME) of Buffalo, New York, targeted its activities to public school educators and students. The Buffalo project is probably the most clearcut example of using the educational process to present fair housing issues.

All projects with educational objectives identified specific target groups for their activities even though many of their activities were designed to educate a broader audience. The key to success among most of the PFHGs was the degree to which they had access to target groups and

the willingness of the groups to participate in educational activities or to be exposed to information about fair housing.

Housing Referrals/Discrimination Counseling

Four demonstration projects utilized housing referrals and/or discrimination counseling as an approach to achieve their objectives. The Chicago project provided housing referrals to clients, as did Suffolk Housing Services, the Fair Housing Council of Bergen County and Fair Housing for the Handicapped in Des Moines.

The Bergen County project provided in-depth housing counseling services designed to assist clients in detecting discriminatory practices by real estate brokers. Counseling and referrals were conducted primarily by telephone but an escort service for homeseekers and face-to-face counseling were available. The Des Moines project worked with the Easter Seal Society to establish and operate a comprehensive housing referral and information program for the handicapped. Suffolk Housing Services combined site visits to client families with telephone referrals. The Chicago project relied exclusively on telephone counseling and referrals.

Little can be said about the effectiveness of the various counseling activities; relatively few clients obtained housing as a direct result of PFHG efforts. However, many clients contacting the agencies were still actively seeking housing at the close of the demonstrations. It should be noted that in many instances, particularly in Suffolk (low-income) and Des Moines (handicapped) availability of suitable, affordable housing served as a barrier to housing placements.

RESOURCES AND TECHNIQUES USED

Projects have been grouped in Exhibit 2 according to the resources and techniques developed and used to carry out the demonstrations. The projects are grouped in the following categories: (1) use of volunteers, (2) use of mass media, (3) use of audiovisuals, (4) use of brochures and booklets, (5) use of community organizations and (6) use of data collection as a major methodology.

Use of Volunteers

Volunteers were used by all PFHGs, and used extensively by two demonstration projects. Of all projects conducted, the most effective use was by the Coalition for Block Grant Compliance (Detroit), where community-based volunteers monitored the CDBG program in ten selected communities. Volunteers played a pivotal role in the monitoring operation and were crucial to the overall success of the project. The research component of the Bergen County project was completed by volunteers, and a large number of volunteers participated in the recruitment programs, distributing brochures and identifying and personally contacting potential minority homeseekers.

For the most part, the PFHGs made only limited use of volunteers and, in several instances, use of such resources may have made a significant impact on demonstration outcomes. For example, if the Des Moines project had been able to develop a corps of volunteers, their outreach efforts with the handicapped may have been more successful. Also, volunteer outreach may have resulted in a greater number of fair housing moves in the Chicago project, which was trying to reach a greater number of

EXHIBIT 2
RESOURCES/TECHNIQUES APPLIED

	Use of Volunteers	Use of Mass Media	Use of Audiovisuals	Use of Brochures and Booklets	Working With Other Community Organizations	Data Collection Activities
Fair Housing Center of Home Investments Fund Chicago, Illinois		X	X	X		X
Metropolitan Washington Planning and Housing Association Washington, D.C.				X	X	X
Fair Housing Council of Bergen County Hackensack, New Jersey	X	X		X		
Housing Opportunities Made Equal Buffalo, New York						
Coalition for Block Grant Compliance Detroit, Michigan	X				X	
Orange County Fair Housing Council Santa Ana, California			X	X		
Fair Housing for the Handicapped Des Moines, Iowa			X		X	
Housing Association of Delaware Valley Philadelphia, Pennsylvania					X	
Suffolk Housing Services Lake Grove, New York						X

clients in the \$15,000 or more income bracket. Findings point out that well-designed volunteer components can be worthwhile resources for carrying out fair housing programs.

Use of Mass Media

Two demonstration projects used print media in their project recruitment efforts. Chicago developed public service announcements for television. Both the Chicago project and the Bergen County project used advertising in a wide variety of newspapers as a component of their outreach efforts to reach a broad cross-section of potential clients.

Both projects found newspaper advertising less effective than personal contact as a recruitment technique. Although newspaper ads produced a substantial number of clients for both projects, the technique proved to be less successful and more costly than anticipated. Newspaper feature stories were included in their outreach effort to provide more in-depth exposure.

Chicago was the only group to make extensive use of television and radio. Of the mass media, television brought in the second highest number of clients (behind newspapers) while radio was third. However, because of the cost to develop videotapes to give to television stations, television was less cost effective than either. A fourth mass medium was also used by Chicago--transit advertising. It was equally effective in generating clients as radio but cost nearly four times as much as television on a per-client basis.

In comparison to other media, newspapers were the most cost effective way to reach the public. This leads to the conclusion that selective newspaper advertising can have enough impact on client recruitment to justify the cost.

Use of Audiovisuals

Audiovisuals were used by two demonstration projects as resources for client recruitment activities and to increase public awareness of fair housing issues. Synchronized-sound audiovisuals were produced by the Orange County project to increase public awareness of fair housing laws. These films were shown in areas of high and low pedestrian traffic such as the county fair and social service agency lobbies, as well as to selected small audiences. Films were produced in both English and Spanish. The Des Moines project produced a film to generate public awareness of the housing needs and problems of the handicapped.

Both projects found audiovisuals to be an effective resource for education and outreach efforts. Des Moines was able to produce the audiovisuals at substantially lower than market costs as a result of personal contacts and contributed services. (This was also true of Chicago's television videotapes.) Although the costs of developing audiovisuals may be prohibitive for many fair housing groups, the potential benefits to be obtained from the broad exposure afforded by this medium are significant. To reduce costs, it is suggested that PFHGs wanting to develop audiovisuals follow the example of Orange County, which developed a longer film and used that film as the basis for making a shorter version. A PFHG that has a 30-second or 60-second filmstrip suitable for use as a PSA can

maximize the impact of using films by airing the short strip as a television announcement. This makes the audiovisual more cost-effective because of the greater number of people that can be reached through television.

Use of Brochures and Booklets

Brochures and/or booklets were developed by four demonstration projects for use in recruitment and education efforts. The Chicago project and the Orange County project designed brochures to supplement the primary outreach/education techniques. Metropolitan Washington Planning and Housing Association developed a booklet for use by participants in their seminar on affirmative advertising practices. A major component of the Bergen County project's recruitment campaign involved direct mail distribution of a brochure which stressed the variety of amenities associated with Bergen County and described services offered by the Fair Housing Council.

Three of the projects received outside "professional" assistance to prepare the brochures and booklets, enhancing the appearance of the products. Direct mail distribution of the brochure by Bergen County resulted in contacts from the intended target groups, but the Chicago project did not document the results of brochure distribution. Because the Orange County and Washington projects used the brochure/booklet for educational (as opposed to recruitment) purposes, it was difficult to measure impact.

Working with Other Community Organizations

Four fair housing groups joined forces with other community organizations to carry out their demonstration projects. The extent of outside participation varied from project to project, with some community organizations playing a larger role in project activities than others.

The Detroit project was structured around "citizen-based" monitoring teams in ten communities. In several of the communities, local organizations were designated as the monitoring teams. The Philadelphia project worked extensively with a coalition of community organizations to develop strategies designed to increase goal achievement in several community development programs. The Des Moines project worked with the Easter Seal Society to establish and operate an information center to identify accessible housing and concurrently, identify handicapped individuals in need of housing. Organizations for the handicapped also participated in project activities. The Washington, D.C. project involved a number of organizations having influence with developers and advertising agencies to cosponsor the affirmative advertising seminars and provide assistance in preparing the seminar booklet.

Community organizations contributed valuable resources to these four projects (personnel, time and money) and provided a broad base of support to achieve project objectives. Other groups undertaking similar projects should note that coalitions can create synergy to generate response from the target groups and help to focus attention on the problems being addressed.

Data Collection Activities

Extensive research and data collection activities were included as a major, ongoing activity in three demonstration projects.

The Chicago project collected data on client characteristics, sources of inquiry and outcomes to determine the effectiveness of the various marketing approaches. The data were also used to determine the cost-effectiveness of the media and methods used in the recruitment effort, and to develop client profiles.

Suffolk Housing Services collected profile data on all audit participants and recorded their experiences in the housing search process. Site visits were made to each client family to determine housing and neighborhood conditions prior to and after a housing move was completed. Complete information on how the family obtained new housing was also gathered. Audit results were tabulated for black and white families in each family size category and a complex system for recording and tabulating the data was developed.

The Washington, D.C. project collected data on real estate display advertisements in the "Festival of Homes" published in the fall of 1977 and the spring of 1978 in the two major metropolitan area newspapers. This process was the basis for the research component of the project. Data collection focused on determining the number of ads using the equal housing opportunity logo and the number of ads using minority models. Data collected during these periods were then compared with baseline data collected during the previous year.

Demonstrations with major data collection activities were conducted by experienced subcontractors who had worked previously under grants or subcontracts to government agencies, mostly at the local level. These groups encountered no major difficulties collecting or compiling data, but some less experienced in this type of activity found it more problematic to gather needed information.

TARGET GROUPS

Exhibit 3 categorizes projects by target groups. The nine demonstration projects addressed the needs of specific target populations in carrying out project activities. Target groups usually were identified in the project objectives. Several projects had multiple target groups and the project objectives addressed a variety of issues.

Special User Groups

Target populations with special housing needs were addressed by two demonstration projects. The Des Moines project focused on the housing needs of the handicapped and Suffolk Housing Services focused on the housing opportunities for welfare recipients. Of the two, targeting the handicapped proved more difficult because of problems inherent in identification of handicapped persons not being served by public social welfare agencies and who are unaffiliated with any group.

Middle-Income Minorities

Two demonstration projects aimed their recruitment programs at urban minorities with incomes more than \$15,000 per year. The Bergen

EXHIBIT 3
TARGET GROUPS OF THE DEMONSTRATIONS

	Special User Groups	Middle-Income Minorities	Public Officials	Educators/ Students	Developers/ Real Estate Industry
Fair Housing Center of Home Investments Fund Chicago, Illinois		X			
Metropolitan Washington Planning and Housing Association Washington, D.C.					X
Fair Housing Council of Bergen County Hackensack, New Jersey		X			X
Housing Opportunities Made Equal Buffalo, New York				X	
Coalition for Block Grant Compliance Detroit, Michigan			X		
Orange County Fair Housing Council Santa Ana, California				X	
Fair Housing for the Handicapped Des Moines, Iowa	X		X		
Housing Association of Delaware Valley Philadelphia, Pennsylvania			X		
Suffolk Housing Services Lake Grove, New York	X				

County project developed a profile of the typical minority homeseeker using information gathered from preliminary market research and the Chicago project determined that high housing costs require their clients to have incomes of at least \$15,000 to compete in the housing market. The two organizations achieved comparable levels of success in attracting this target group.

Public Officials

Public officials were the target of three demonstration projects that hoped to implement changes in government-funded housing and community development programs. A variety of strategies was used by the projects. The two basic approaches to generate increased response of public officials were cooperation and confrontation. It appears that cooperation worked better and created measurable results in Detroit and Des Moines. In Philadelphia, the fear is that even though confrontation tactics resulted in a major concession from public officials, the funds reallocated to the demonstration's target area may never be spent.

Educators/Students

The primary target group for the Buffalo project and one of seven target groups for Orange County was educators and students. The Buffalo project developed teaching modules on fair housing for students at the elementary and secondary levels. A secondary objective of the project was to determine the responsiveness of school officials and teachers to incorporation of fair housing units into the curriculum. There appeared to be some correlation between demographic makeup

of school areas and the willingness of school officials to participate. However, the materials seem equally effective in all types of school districts.

Audiovisual presentations on fair housing laws were conducted by the Orange County project in secondary schools and colleges to increase student awareness of fair housing issues and to test the educational effectiveness of the audiovisual. The presentation content was tailored to the specific needs of the general population rather than educational institutions alone. Students' reactions indicated that the brief eight-minute audiovisual was too "simple" to be educationally effective.

Developers/Real Estate Industry

Two demonstration projects attempted to influence the practices of developers and realtors through their project activities. The Washington project conducted seminars for developers and real estate advertisers to heighten awareness of subtle discriminatory messages conveyed through display advertising and attempted to convince attendees to modify their advertising practices. Orange County showed its audiovisual and made presentations to real estate agents and was asked subsequently to participate in a real estate training course.

REPLICABILITY ISSUES

This demonstration was designed to show what tactics can be used at the community level with limited resources to impact upon pervasive fair housing problems and issues. Some of the procedures

and techniques tested were more innovative than others and some were simply variations of the types of activities PFHGs always have conducted. MBA assisted in the formulation of the workplans and schedules, but the ideas and approaches were developed by the PFHGs. This was a departure from HUD's usual approach to demonstrations--controlling the project design and selecting demonstrators with the capabilities to carry out the designated activities. The projects were not based on the traditional testing of certain hypotheses or assumptions, but rather on the interests and backgrounds of the participating organizations. This lack of common standards makes it difficult to compare and measure performance factors objectively. Therefore, findings presented here are subjective, for the most part, with process factors far outweighing performance factors in MBA's assessment.

No single project stood out as being replicable in its entirety, although most of the demonstrations developed some process or product that can be replicated readily by other private fair housing groups. Inherent weaknesses in project design prevent an accurate prediction of the success of specific techniques adapted from demonstration outcomes. Nevertheless, the products and activities described below are considered by MBA to be worth adopting and implementing as affirmative fair housing techniques.

Advertising

Use of advertising to increase the number of members or clients was demonstrated to be a cost-effective approach. Generating interest through word-of-mouth (or personal contacts) was the least expensive

method. However, for word-of-mouth to be effective, it is necessary to have an existing network through which contacts can be made. In the absence of such a network, as in Des Moines, newspaper advertising could be the least expensive method to increase public awareness of a group's programs and/or services.

Audiovisuals

Audiovisuals proved to be extremely effective in generating public awareness of fair housing issues. The slant of the audiovisual subject content and its presentation format will have an impact upon the effectiveness of a film or videotape with varying audiences. PFHGs exploring the development and use of audiovisuals first should decide to whom the material should be addressed and then direct the content to that audience.

Market-rate production costs are prohibitive, but the demonstration projects proved it is possible to obtain a variety of resources and in-kind contributions to reduce significantly the amount of cash required to develop audiovisual products. It also was demonstrated that films and videotapes can serve either an educational or a marketing function.

Fair Housing Brochures

Brochures can convey an understanding of fair housing to either the general public or special target groups and can be used as supplemental information items in conjunction with audiovisual presentations and other media approaches. Brochures can be distributed

effectively at meetings and presentations, or door-to-door (as in Bergen County). Mass mailings were less successful, as shown by Orange County's attempt to send them to everyone on their mailing list.

Fair Housing Curriculum Materials

Fair housing curriculum materials for use in classrooms also proved to be a highly replicable product. Few educational materials currently are available for use in housing or social studies courses or modules. It is possible that teaching elementary and secondary students about fair housing issues may, in time, affect students' attitudes and behavior relative to equal housing opportunity. Some PFHGs may wish either to adopt the modules developed by the Buffalo project or develop their own. As shown in the Buffalo demonstration effort, the most difficult part of the process may be to convince school systems to participate.

Promoting Use of Fair Advertising Practices

Washington, D.C. probably has one of the highest rates of usage of the fair housing logo in newspaper display advertising and, therefore, efforts to increase that usage did not meet with much success. However, usage of the logo in other cities tends to be minimal in both display and classified advertising (as found in a study of affirmative marketing practices in several U.S. cities). While the approach used by the Washington project--conducting seminars and developing a handbook on fair advertising--had little effect in that housing market, it is believed by MBA that such efforts could be undertaken elsewhere to

much greater effect. The handbook provides examples of affirmative advertising techniques and could be used in most communities as a guide for developers and apartment managers who use display advertising.

Monitoring Housing Programs

With diligent monitoring of the implementation of housing and community development programs, PFHGs can help to ensure the response of these programs to the needs of community residents. Monitoring has increased in importance since the block grant program was implemented because use of CDBG funds is discretionary within fairly broad parameters. Two issues of relevance are: (1) the appropriateness of the community needs the program officials choose to address and (2) whether performance in the program is consistent with its goals and allocations. Use of a coalition of groups to monitor programs, as in Philadelphia, is a promising technique that could be explored elsewhere. Using volunteers to monitor CDBG programs worked extremely well in the Detroit area. Detroit volunteer teams were able to get a number of program changes implemented. In Suffolk County the "audit" of the home-seeking experiences of low-income families constituted a monitoring effort. The Suffolk group had ammunition for use to work to effect changes in a system which perpetuated discriminatory practices.

Heightening Consumer Awareness of Fair Housing Rights

Most of the demonstrations addressed the issue of lack of consumer awareness of housing rights and opportunities. To heighten this awareness among the general public and special groups, a variety

of recruiting and counseling techniques were implemented. Among the more replicable of these techniques is Bergen County's "early intervention" counseling which cued homeseekers to look for specific steering and other discriminatory practices and thereby used the consumer to force the real estate industry to a higher level of response to consumers' desire for more housing options in a wider variety of communities. Such a process easily could be added to most PFHGs' existing counseling activities.

These are examples of some of the useful tools and techniques that may be refined for use by others. Several of the products developed in the demonstration are reproduced easily and either can be used in their present form or can serve as prototypes for adaptation to local needs and issues. Some have the potential to be income-producing. Appendix A contains descriptions of products that could be obtained for use in other locations and situations.

MANAGEMENT ISSUES

For the most part, the demonstrations did not have management problems. The major problem was schedule slippage, since most of the PFHGs were not accustomed to meeting deadlines. Of particular importance was that almost all of the projects required far more orientation and start-up time than had been allocated (about three months). Several were not ready to start on January 1, 1978, as planned. Consequently, what was to be a 12-month demonstration phase was typically three months late getting under way and three months late delivering the final report.

All the PFHGs were cooperative and interested in meeting their goals, but their ability to carry out the workplans varied. MBA found that those groups with previous work experience for the federal government tended to be better able to fulfill the administrative and reporting requirements of the subcontracts and were able to communicate more clearly their goals and activities.

Some groups did not understand the need to document their procedures and approaches, since the role of private fair housing groups always has been to assist individuals and families requiring intervention. It particularly was difficult to emphasize the need for baseline data. Despite initial reluctance, each subcontractor was in compliance by the end of the demonstration period. One related point worth noting is that the quality and quantity of data available for use in the evaluation varied among the groups, making comparisons difficult and conclusions elusive.

While this affirmative fair housing demonstration was not conducted in the manner usually employed by HUD, MBA believes that overall, the effort produced worthwhile outcomes that, if more widely replicated, could have measurable impact on fair housing and equal opportunity in this country.

Private fair housing groups nationwide have a unique and important role to play in the equal rights arena. It is hoped that such groups will be guided and inspired by this compilation of the outcomes of the Affirmative Fair Housing Techniques Demonstration.

APPENDIX A

DEMONSTRATION PROJECT DESCRIPTIONS AND FINDINGS

HOUSING OPPORTUNITIES MADE EQUAL

BUFFALO, NEW YORK

This demonstration was designed to assess the feasibility of instituting fair housing teaching modules in public and parochial schools at the secondary and elementary levels in the metropolitan Buffalo area. The project was implemented to develop educationally sound curriculum units on fair housing and to determine the response of school officials and teachers to the concepts.

DEMONSTRATION PROJECT ACTIVITIES

The first step of the demonstration was to determine availability of existing fair housing teaching resources and the content of such materials. Existing resources on the topic of fair housing were identified through two sources: Computer-Based Resource Units (CBRU) and the Education Research Information Clearinghouse (ERIC), both computerized data banks of educational information available through computer access at local universities. This was supplemented by a review of social studies textbooks.

Of the 55 available CBRU units, four contained teaching materials specific to housing issues. These units, initially prepared as dissertation topics during the last two decades, were determined by the project staff to be too general, since key facts and concepts were missing. Nine of the 77 ERIC documents examined were found to be related to housing opportunities, most of them concerning tenant relations.

A project coordinator was hired to develop new content on fair housing for two teaching modules and to prepare them for an initial field test. These teaching modules were reviewed prior to field testing by a panel of two economists, a teacher, a fair housing specialist, a rental assistance specialist and a minister active in housing matters. The modules are described below:

Finding Shelter: Elementary Module

This 31-page module has 12 chapters and presents a number of housing and fair housing concepts in the context of a social studies curriculum. Many parallels are drawn between the historical perspective (moving to the new world in colonial times) and modern-day issues (moving from rural areas to the city). Segments of the elementary modules were devoted to subjects ranging from the most basic process of "finding shelter"--locating a place to live, reasons for moving, financing a home and housing taxes--to concepts of discrimination. Examples used in the modules included facing rejection because of religious beliefs, neighborhood

integration and equal opportunity laws. Also included were the more sophisticated issues of ghettos, restrictive covenants and various means of keeping "others" out. Each chapter begins with a historical illustration of the concept followed by a set of questions. The chapter then presents a current example of the concept, followed by questions that encourage students to draw upon their own experiences. Comprehension, analysis and evaluation skills are required to answer the questions. The material is illustrated with line drawings.

Housing Opportunities: The Secondary Module

This 106-page teaching module includes segments on the effect of economic and local laws on the housing market and provides guidance in making the decision whether to buy or rent. There is a segment on housing programs under the auspices of the U.S. Department of Housing and Urban Development and on federal housing laws. The influence of the housing industry on housing opportunities is presented, along with information about federal and state actions that affect housing opportunities. The module also discusses laws that require monitoring and shows how to participate in that activity.

There is frequent use of graphs, charts and reproductions from various pertinent documents to supplement the text. Interspersed within each chapter are questions for discussion that require the students to use comprehensive and analytic skills.

Marketing the Modules

A marketing and promotional strategy was designed to induce principals to accept the demonstration's teaching modules in their schools and to interest teachers in using the modules. The marketing strategy was aimed at obtaining a diverse sample of classrooms in which to test the modules.

Integral to the marketing and promotional approach was a decision not to identify HOME as the designer and promoter of the materials. Instead, the modules were marketed by "The Housing Educational Project" and did not identify fair housing as the key topic addressed. HOME used this strategy so that the content of the modules would be judged on merit rather than equated with the image of HOME, which is well-known for its fair housing advocacy activities. Any resistance would be directed toward the content of the modules rather than the organization.

For the first field test, letters and brochures describing the modules were sent to 128 elementary and secondary school principals in the public and parochial school systems in the Buffalo metropolitan

area. A total of 20 responses was received (12 from secondary and 8 from elementary) expressing interest in testing the modules. For the second field test, the 128 principals were contacted again; 16 responded affirmatively. HOME believed response might have been greater if there had not been scheduling conflicts during both six-week periods when the modules were made available for classroom use. There was a conflict with state and local testing programs in May and June and holidays and related activities created conflicts in November and December.

Six elementary school classrooms--four fifth-grade, a seventh-grade and one eighth-grade classroom--participated in the first field test. Ten were involved in the second test--eight fifth grades and two eighth grades. At the secondary level, seven different classrooms participated in each test. City schools comprised the majority of the sample, many of them parochial and many predominantly minority schools. Two schools were in rural areas; there was minimal participation from suburban schools.

Testing the Modules

Materials for the initial test of the curriculum modules were available from May to June 1978. Orientation of the selected teachers was directed partly to ensure comparability of documentation data from class to class, and partly to explain that the teachers were to present the course in a week's time, omitting sections of the modules as they chose. One of the data items the coordinator was seeking was a determination of which sections of the modules teachers chose to omit. Teachers were to inform their students that they were participating in a test of new materials and that their suggestions would be used to revise them. Scores from the pre- and post-tests were used to determine content validity and revise the modules. Comments from teachers and students also were incorporated into module revisions.

HOME'S FINDINGS AND CONCLUSIONS OF THE DEMONSTRATION PROJECT

Based on its preliminary research, HOME found a lack of materials on housing and fair housing at both the elementary and secondary levels and concluded that the development of such materials would fill a gap in the availability of housing-related curricula. Initially, they were pessimistic about the receptivity of both principals and teachers to the use of teaching modules addressing housing discrimination in the classroom; however, this fear was not borne out by the outcomes of the demonstration.

Based on test scores and teacher comments, HOME concluded both students and teachers involved in the housing educational project were more knowledgeable about fair housing after exposure to the modules than they were prior to exposure. As a result of the demonstration, it was found that, from the students' and the teachers' perspectives, fair housing can be incorporated successfully into classroom learning situations at both the elementary and secondary levels.

FAIR HOUSING CENTER OF HOME INVESTMENTS FUND
CHICAGO, ILLINOIS

To attract clients in previous years, Home Investments Fund (HIF) relied heavily upon traditional public relations approaches (guest appearances on television and radio talk shows, public service announcements, HIF staff contact with other housing agencies and satisfied client referrals). These approaches worked well but had been implemented on a sporadic basis. HIF realized it needed an ongoing, comprehensive media and outreach program. As a result of analysis of the cost-effectiveness of previous public relations efforts, it was concluded that households with incomes of \$15,000 or more were most likely to make a fair housing move. Therefore, this group was selected as the target of the new marketing thrust.

DEMONSTRATION PROJECT ACTIVITIES

Development and Implementation of
the Marketing Campaign

HIF's marketing campaign for the demonstration involved the development of newspaper advertising to appear simultaneously in selected newspapers for two three-month periods during peak house-hunting seasons--March to May and July to October. Types of newspapers selected included:

- A large-circulation conservative daily
- A popular liberal daily
- A major minority daily
- Community weeklies

Other forms of media distribution included filmed and videotaped fair housing presentations and public service announcements (PSAs) for five television stations, as well as PSAs for five minority-oriented radio stations. Again, distribution was centered around the traditional house-hunting seasons. In addition, 100 display ads were designed and placed in public transportation, i.e., buses and rapid transit vehicles.

An outreach program also was developed and included guest appearances by HIF project staff and others on radio and television talk shows. Additionally, newspaper articles on fair housing activities in the Chicago metropolitan area were prepared, as well as articles on HIF and the services it provides.

To record the results of the demonstration, HIF modified its client intake form to facilitate data collection. The data collected would enable specific project staff to determine client characteristics, sources of inquiry and outcomes. Analysis objectives included:

- Determination of the effectiveness of the various approaches used in the demonstration in reaching different types of clients
- Development of client profiles

Cost Effectiveness of Media Approaches

Of the advertising methods for which HIF paid, radio turned out to be the least expensive on a cost-per-client basis, while the transit displays were the most expensive. These two techniques were equally ineffective in attracting clients. Given the number of clients attracted, combined with the cost per client, newspaper advertising appears to be the most all-around, cost-effective technique for attracting clients who make fair housing moves. The table below presents a comparison of the cost effectiveness of all media for producing clients making fair housing moves and clients earning \$15,000 or more for the 1978 demonstration period:

Media Approach	Fair Housing Moves	\$15,000+	All Clients
Friends	N/C	N/C	N/C
Agencies	N/C	N/C	N/C
Newspapers	\$ 43.48	\$ 30.77	\$ 16.07
Radio	\$ 48.00	\$ 13.10	\$ 3.14
Television	\$295.71	\$ 36.60	\$ 13.23
Transit Displays	\$814.00	\$130.32	\$ 49.04

HIF analyzed the use of each type of outreach method from the standpoint of its cost effectiveness; the following conclusions were presented in their final report:

- Friends and agency referrals were the most effective means by which to produce results,

regardless of specific client characteristics, at no cost per client.

- Newspaper advertising was a highly effective means of attracting clients, regardless of special characteristics, at an average cost of \$16.07 per client; it also resulted in a high number of fair housing moves.
- Although the use of radio advertising averaged a cost of only \$3.14 per client, it was responsible for only four percent of the fair housing moves.
- Transit displays were the least cost-effective method to attract any type of client, with a per-client-cost of nearly \$50.

Development of Client Profiles

One of the analysis objectives was to develop a profile of clients who responded to the media campaign. In general, they were quite similar to HIF's clients from previous years, with two noteworthy exceptions. There was a substantial increase in clients already living in the suburbs and a greater number who were unemployed.

Among demonstration clients, 63 percent of those making fair housing moves had incomes of \$21,000 or more, with many having incomes of more than \$30,000. More were in professional and managerial positions, although 49 percent were employed in skilled, technical or clerical jobs. They tended to have smaller families (61 percent had one child or none) and many were already living in the suburbs.

FINDINGS AND CONCLUSIONS OF THE DEMONSTRATION PROJECT

In addition to determining which approaches could be implemented successfully with residual results for the Chicago area, HIF sought to identify and test those types of media which exist and could be replicated in nearly every major metropolitan area. As a result of their efforts, project staff had several suggestions for groups desiring to design and implement a marketing campaign to attract clients to fair housing agencies. HIF recommended that a campaign should include:

1. Two sets of television public service announcements for national television networks, one to be aired in early spring and one to be aired in mid summer

2. Four to six sets of radio public service announcements, each set airing for a two- to three-month period on stations with substantial minority audiences
3. A small newspaper ad appearing in: a liberal daily for two weeks (spring and midsummer), two community newspapers for two weeks (spring and midsummer) and two or more free weekly city newspapers
4. Four major newspaper feature stories yearly
5. Six television talk show appearances yearly
6. Eight radio talk show appearances yearly
7. As many speeches and seminars as possible
8. Monthly staff contact with local cooperating agencies
9. A semiannual mailing to satisfied clients to keep them up to date on services offered by the agency

As stated by HIF in its final report, successful outreach for a service-oriented agency continues to lie in strong traditional public relations, combined with referrals from cooperating agencies and, most importantly, referrals from satisfied clients.

FAIR HOUSING FOR THE HANDICAPPED

DES MOINES, IOWA

Three distinct housing problem areas were the focus of the project: (1) low occupancy among the handicapped of existing independent units, (2) lack of congregate housing facilities for semi-independent living and poor conditions for handicapped in nursing homes. FHH conducted the following specific activities to generate public awareness:

- Produced a film to be shown to advocate for the housing needs of the handicapped
- Developed and disseminated a brochure on FHH and its program (a direct mailer)
- Designed and ran a newspaper ad to solicit support and membership
- Participated in a four-part evening news program on handicapped housing problems
- Participated in a ceremony when the Governor of Iowa proclaimed 1978 as Handicapped Awareness Year
- Served as guests on a 25-minute radio program
- Cooperated in development of and participated in the Iowa Easter Seal Society-sponsored Handicapped Housing Conference
- Generated several newspaper articles about FHH and its activities
- Conducted a two-week Handicapped Awareness Campaign
- Published and distributed the monthly "Fair Housing Newsletter"
- Prepared and aired radio public service announcements
- Participated in TV talk shows and news spots

In addition to increasing public awareness of the housing needs and problems of the handicapped, specific emphasis was placed on reaching three specific groups to gain support for project plans and activities:

- Handicapped organizations and their constituents
- Handicapped individuals and their families, who were unaffiliated with any organizations
- Public officials and agencies and private organizations whose resources or support would be needed to accomplish objectives

DEMONSTRATION PROJECT ACTIVITIES

Increasing Occupancy in Independent Units

At a Handicapped Housing Conference in which FHH collaborated with the Easter Seal Society (ESS), major barriers preventing resolution of housing problems were identified as:

- Lack of information about available housing and inability to identify handicapped individuals who need housing
- Prevalence of rents beyond the financial capabilities of the handicapped
- Lack of transportation for handicapped individuals to seek housing and if housing is found, lack of accessible and affordable public transportation to accommodate their continuing needs

To increase occupancy in independent living units, each of these barriers had to be overcome and FHH relied heavily on ESS to assist in this task. Through a comprehensive program, ESS provided housing counseling, assistance with rent subsidies, transportation to look for housing, relocation assistance, and liaison services between public and private property managers and clients. FHH participated by advertising available housing in its monthly newsletter and referring interested parties to ESS.

Obtaining Commitments for 30 Units of Congregate Housing

Efforts toward this objective took several tracks as required by the complexity of the issue. Included were activities to:

- Work with the city to establish a fair housing for the handicapped project and to get congregate facilities in the Housing Assistance Plan for Des Moines
- Work with a variety of public agencies to identify the various supportive services and subsidies that can be provided for congregate housing

- Work with private organizations to plan and design congregate facilities
- Work toward the goal of FHH participation to develop 15 congregate housing units

Results of FHH's efforts toward this objective include:

1. City Commitment to Housing for Handicapped: In 1976, at the request of FHH, the City Council authorized an appropriation for a fair housing for the handicapped project to promote the development and construction of housing that would meet the needs of the physically handicapped. To date, the city has allocated more than \$100,000 for the housing needs of the handicapped. In its housing assistance plan, the city has committed 50 housing units to be reserved over the next three years for handicapped persons requiring congregate living quarters.
2. Identifying Resources for Congregate Services: In the Des Moines 1979 Neighborhood Development Comprehensive Plan, \$165,082 was allocated for comprehensive services to the elderly and handicapped. Included in this figure were 600 congregate meals per day, in-home support services and handyman chore services. Near the end of the demonstration, three new sources of federal funds for congregate services became available: the Congregate Housing Services Act of 1973, the 1978 amendments to the Rehabilitation Act of 1973 and the December 1978 provisions for use of Section 8 rent subsidies for independent group residences.
3. Cooperative Efforts to Develop Congregate Housing: FHH worked closely with other organizations planning and developing housing for the handicapped and elderly to promote congregate services. Included among these organizations were the Easter Seal Society, two organizations sponsoring existing Section 202 housing complexes and a local labor union.
4. FHH Sponsorship of Congregate Housing: FHH pursued the possibility of sponsoring its own Section 202 project for the handicapped. It investigated incorporating semi-independent congregate facilities with housing for the "severely handicapped" (those individuals requiring personal and health-related services).

Improving Nursing Home Conditions for the Handicapped

FHH met with the State Board of Nursing Home Administrators to discuss the need for young and middle-aged handicapped individuals to be separate from the seriously ill and to describe some programs that could be planned for them. As noted in the demonstration's final report, "the results of this meeting were less than productive." Major obstacles were a lack of information about actual conditions in nursing facilities and lack of receptivity by nursing home officials. On two occasions FHH specifically attempted to deal with crisis situations where conditions had become unbearable and/or unsafe for handicapped persons in nursing homes. However, much of the information FHH obtained was secondhand and there were few opportunities to document poor conditions or to remedy existing situations.

Advocating for Handicapped Housing

In the course of advocating for housing for the handicapped, FHH found that the placement of independent handicapped in accessible units and trying to find resources and commitments for congregate housing could not be accomplished without improvement in a wide range of related problems. FHH conducted extensive lobbying at both the state and city levels to avoid reversal of existing state accessibility requirements for units for the handicapped and to make state building codes more responsive to the needs of the handicapped. Other activities conducted by FHH related to transportation, employment and services for the handicapped, all relevant to meeting housing needs (i.e., without employment, handicapped persons cannot afford apartments and without transportation they cannot get jobs).

FHH'S FINDINGS AND CONCLUSIONS OF THE DEMONSTRATION

This demonstration project established ambitious and complicated objectives: to have an effect on the housing problems of three distinct groups of the handicapped and to bring about the development of 30 units of congregate housing.

One basic problem encountered was obtaining involvement and support from the handicapped themselves. FHH expressed particular disappointment at their lack of success in reaching persons unaffiliated with any of the handicapped service and advocacy organizations. This was attributed in part to the difficulties involved in identifying individuals who do not receive services from public or private sources. Relying on the mass media as the primary outreach mechanism, little direct support or participation came from handicapped individuals and their families. Another reason FHH believed individual participation was low was lack of transportation services to carry the handicapped to and from meetings and other events.

In efforts to improve nursing home conditions for the handicapped, FHH found that lack of cooperation among nursing home administrators served as a strong barrier to producing any results. It was concluded that gaining access to nursing home facilities is a major problem and only organizations which have some legitimate reason to visit these facilities (such as churches and charitable groups) will be able to observe and document the nature and severity of problems among handicapped occupants.

To increase occupancy in existing accessible units, a wide variety of services (including transportation and counseling) had to be provided to prospective handicapped tenants. FHH did not have the resources to provide such services but found that by collaborating with an organization that did, the objective could be achieved.

FHH found obtaining a commitment for development of congregate housing with a 12-month period was an unrealistic objective, although identifying resources for funding congregate services proved to be less of a problem than anticipated.

FHH concluded at the end of the demonstration that its project had been overly ambitious. However, many things were beginning to take place as the project drew to a close and FHH believed progress would be made within a year in many of the task areas that fell short during the 12-month demonstration period.

COALITION FOR BLOCK GRANT COMPLIANCE

DETROIT, MICHIGAN

The Coalition for Block Grant Compliance developed and implemented a "citizen-based" system for monitoring Community Development Block Grant (CDBG) activities in ten suburban Detroit communities. This system used a combination of paid staff monitors and volunteer teams of individuals residing in each of the selected cities, counties or townships. The teams functioned as advocates and catalysts to improve compliance with HUD requirements for fair housing, housing assistance programs and citizen participation in the CDBG planning process. The Coalition encouraged each team to set its own priorities and follow its own approaches to advocate for change and improvement. The Coalition provided general guidance and some basic procedures:

- Each team was to document its assessment through the formal process of submitting comments to the director of the Community Planning and Development Division in the HUD Area Office in Detroit. These comments were to address the communities' current Grantee Performance Reports (for the previous year), the 1978-79 applications for CDBG funds and the local Housing Assistance Plans. The responsible officials in each local community were to receive a copy of these formal comments to HUD.
- Each team was responsible to advocate for the changes recommended in its comments and to work with community leaders to bring about the desired improvements.
- Records were to be maintained of: (1) the type and outcomes of monitoring activities, and (2) recommendations to city and HUD officials and the method by which the recommendations were implemented, rejected or under consideration.

These basic procedures allowed each team the freedom to identify problems and activate its own strategies to deal with them.

DEMONSTRATION PROJECT ACTIVITIES

Community Selection Criteria

Ten diverse communities in three counties in the suburbs of Detroit were targeted in the demonstration project. The criteria used to select these jurisdictions were as follows:

- Geographic location
- Communities' fair housing performance record
- Size of the communities' "expected to reside" housing assistance need figures
- Size of the communities' 1977-78 block grant
- Feasibility of establishing a citizen monitoring team in the community
- Size and extent of political power of the communities' local minority populations
- Whether the communities were older and developed or newer and less developed in their overall current land use patterns

These criteria yielded a variety of characteristics among the ten communities selected for monitoring:

Wayne County

Wayne County (Urban County Program; 30 participating local jurisdictions)
City of Dearborn
City of Inkster
City of Hamtramck

Oakland County

Oakland County (Urban County Program; 45 participating local jurisdictions)
City of Farmington Hills
City of Royal Oak

Macomb County

City of Sterling Heights
City of St. Clair Shores
Clinton

Monitoring Team Efforts

The problems identified and the outcomes of the monitoring process in each community are described in the following summaries of each team's efforts.

Wayne County Urban County Program

One of two urban county block grant programs in the Detroit metropolitan area is operated by Wayne County. Ninety-five percent of the county's grant is distributed to participating local jurisdictions and groups of jurisdictions for eligible block grant activities approved by the county and HUD. The remaining five percent is used for county administrative costs. Two major problems addressed by the Coalition staff monitor in the Wayne County program in 1978 were: (1) the problem of effective citizen access for monitoring purposes to the total program and its parts and (2) the issue of historically deficient fair housing performance, particularly at the local level. Two sets of formal comments were submitted to the county and HUD recommending that:

- A system be developed with the county to facilitate citizen monitoring
- A countywide commitment, including local cities' obligations, to a systematic fair housing program

Outcomes included establishment of a citizen task force as a new advisory body related to the program's countywide advisory council of elected officials, with Coalition representation on the task force and the award of a county contract with the Fair Housing Center to provide training in fair housing information/referral procedures for key employees of local communities.

City of Dearborn

This city has a history of racial exclusivity and housing discrimination. The leaders of the monitoring team in Dearborn understood use of traditional fair housing strategies would be likely to cause a major citywide reaction that could result in the city's total withdrawal from the block grant program, consequent loss of funds to improve the team's chosen target area and loss of HUD leverage for fair housing and housing assistance programs. Therefore, open and highly visible action was not undertaken. The team did not file comments on the CDBG program. Instead, it operated as an active link with the Coalition itself and worked quietly with local leaders to avoid open conflict in the community.

While the Coalition and team were working quietly within the target area, a confrontation developed between Dearborn and HUD, which wants the city to develop subsidized family housing outside the already impacted target area--a condition with which the city has not complied. The city is threatening to drop out of the block grant program and has sought written endorsements from community groups to resist HUD's expected continued pressure to develop subsidized family units except where the highest concentration already exists. Key citizen leaders in the target area resisted allying themselves with the city and used channels developed

during the monitoring project to develop an independent position. Coalition staff began to help local leaders prepare to seek independent funding sources in the event funds are cut off.

City of Inkster

This city had a 47 percent minority population in 1970 and currently has a black-controlled city government. A major black area of the city, Carver Homes, has been the subject of urban renewal clearance plans which only recently began to materialize under the block grant program. The major issue in the community related to the block grant program has been whether to demolish or rehabilitate Carver Homes.

Inkster's monitoring committee was composed of a core of black community activists with a history as critics of the local government's operations. From time to time, the committee mobilized nearly 100 additional citizens from the Carver Homes area. Problems addressed during 1978 by the committee included: citizen participation in the CDBG program; property acquisition, rehabilitation loans and grants, and clearance of the entire Carver area; and apparent lack of local effort to provide public improvements in predominantly minority areas of the city.

City of Hamtramck

Hamtramck is a community historically dominated by Polish families. While the city's black population has been growing and an enclave of Arab immigrants has settled in Hamtramck, the city has maintained its white, ethnic character.

A local organization, Black Concerned Citizens (BCC), was the local monitoring team that pursued the following issues: fair housing, municipal hiring of minorities and community improvements in minority areas. Noteworthy activities and outcomes included the following:

- The team protested to the HUD Area Office the city's plan to use a HUD discretionary grant to rehabilitate 13 homes in a census tract scheduled to be cleared for an industrial park. HUD required the city to shift its rehabilitation area to another tract having a predominantly minority population.
- As a result of team efforts, a greater proportion of the city's block grant funds is being devoted to housing needs of low-income residents, and the city has devoted more funds to improve utilities in the urban renewal area--an activity it had refused previously to undertake.

Oakland County Urban County
Program

Major problems addressed in 1978 by the monitoring committee in Oakland County included:

- Lack of specific county actions to prevent housing discrimination and to further affirmative fair housing
- Failure by the county to meet its approved goals for housing assistance to the elderly, families and large families
- Apparent inability to ensure housing assistance goals will be reached
- Specific issues of performance and budgeting in some of the 45 individual communities participating in the county program
- Refusal of one of the 45 participating communities (city of Birmingham) to permit development of an assisted housing development for low-income elderly and family households

The major outcome of this monitoring process was that HUD issued eight negative performance findings, including:

- Inability to ensure housing assistance
- Inability to account for all CDBG funds drawn to date
- Lack of minority benefits in the county's rehabilitation programs
- Unclear reporting of households to be displaced as a result of CDBG activities

The county responded adequately to all but one of the findings--the question of Birmingham's refusal to permit development of subsidized housing. As a result of this refusal, the county was required to reallocate Birmingham's share of block grant funds to other communities. Other actions taken by the county in response to concerns of HUD and the Coalition were the establishment of a countywide housing council and a change in the county's citizen participation plans.

City of Farmington Hills

The monitoring committee in Farmington Hills was one of the largest and most active in the project. It investigated and filed comments on a number of aspects of the city's program, including: the rate of expenditure of block grant funds, fair housing activities, location of subsidized housing, relocation and neighborhood improvement and flooding problems. Changes resulting from the team's activities included:

- Increased staffing of the city's rehabilitation program and a larger number of rehabilitation loans and grants to the low-income area in a shorter period of time
- Passage of a citywide tax increase to supplement CDBG funds for sewers in the low-income area
- Increased public awareness of the CDBG program's housing assistance requirements

The latter proved to be a problem that led to the city's decision not to apply for future block grant funds. Partly because of the monitoring committee meetings, city officials learned HUD requires the city develop subsidized housing and lowest income census tracts be designated as sites for such housing. Instead of supporting the monitoring committee's recommendations that the sites be located elsewhere, a series of hearings were held that ultimately led to a City Council vote to stop participating in the block grant program.

City of Royal Oak

Royal Oak is located two miles north of Detroit along the Woodward Avenue corridor in Oakland County. With a population of 85,000, less than two percent was reported as minority in 1970. The city currently has a fair housing ordinance and an official human relations body.

In 1977 Royal Oak had 247 government-assisted housing units for the elderly, but no assisted units for families. According to the city's 1977 Housing Assistance Plan submitted to HUD, the city needed 616 assisted housing units for persons "expected to reside," the third highest number of units in the ten communities selected for monitoring.

Under all of six possible regional development strategies, the city's total population is expected to decline between 1978 and the year 2000, according to the regional planning agency. The 1970 median value of owner-occupied housing in Royal Oak was \$21,300, placing it sixth among the eight individual local jurisdictions covered in this project.

The monitoring committee made specific verbal recommendations to both HUD and city officials. The primary areas of concern were:

- The city's need to develop additional assisted housing opportunities for both elderly and family households, including the "expected to reside" category
- Possible need for revision of the city's fair housing ordinance

Because the city failed to provide subsidized housing units for families, the HUD Area Office also made clear to the city it was concerned about the city's need to develop assisted housing. This became an issue in the city's attempt to gain HUD approval for a second subsidized 210-unit senior cooperative high rise. The Royal Oak staff monitor and Coalition full-time staff participated in joint decisions with the city staff, the housing developer and HUD's elderly population and low-income families. Partly as a result of the committee's efforts, by the end of 1978 the city had applied for and received HUD approval for an allocation of 50 units of Section 8 housing subsidies. These funds were to be used for existing dwellings for low-income families; open to both current eligible residents and families expected to reside in the city because of their jobs.

City of Sterling Heights

The community is considered to be one of the fastest growing cities in the state. The Sterling Heights monitoring committee focused on a number of problems with the city's 1978-79 CDBG application, including:

- Proposed use of 75 percent of CDBG funds for sewers and paving in a neighborhood not reported having significant lower income compared to others
- Failure to implement (after three years) the low-interest rehabilitation loan program
- Lack of a rehabilitation grant program for low-income housing
- Apparent noncompliance of the city's Housing Assistance Plan with revised HUD regulations

A major outcome was the requirement that rehabilitation of 15 units be achieved within eight months to avoid a 1979 finding of deficiency by HUD. The requirement could be a condition of HUD's 1979 approval of the city's next application. The city also said the Coalition-suggested mechanisms for more closely targeting the street/sewer project benefits were being considered.

City of St. Clair Shores

An older suburb, St. Clair Shores has only one percent minority population. The major fair housing and equal opportunity problems addressed during 1978 by the local monitoring committee were:

- Urgency of covering a large open drain
- Inadequate funds budgeted for rehabilitation loans and grants for low-income homeowners
- Questionable budgeting of 44 percent of the city's \$900,000 block grant for a commercial strip project
- Inadequate fair housing activities and irrelevant activities reported to HUD as being fair housing-related
- The city's nonuse of 30 Section 8 subsidy certificates for low-income persons, despite the city's low vacancy rate and the insufficiency of housing assistance goals for substantial rehabilitation with Section 8 subsidies
- Lack of subsidized housing opportunities outside the minority area of the city

Outcomes included an agreement between the city and HUD for a new assisted family housing goal. The city will acquire 100 scattered existing units, rehabilitate them and lease them to low-income persons, despite the city's subsidies. HUD gave a "conditional" approval to the 1978-79 application, but required special reporting and performance for the city to avoid reduction or loss of this grant and its 1979-80 grant. Another outcome of the monitoring team's efforts was that the city decided to budget substantial 1978-79 funds to close off the offending drain.

Clinton Township

Clinton Township is a rapidly growing, predominantly white community. Two areas, one black and one white, with considerable assisted housing and 235 units became the focus of the monitoring efforts. Among the major problems addressed were:

- The small amount budgeted for home rehabilitation
- Expenditures for parks and streets in middle- and high-income areas compared to amounts budgeted for low-income areas
- Failure of township to perform in meeting goals for subsidized housing development.

The monitoring committee submitted 12 specific formal recommendations to HUD and local officials. Although the formal comments of the team alleged serious violations of the law and were well-documented, HUD contended that the comments arrived too late in HUD's 75-day application review period to be considered fully. Clinton Township's 1978-79 grant application for DCBG funds was approved without pertinent modifications. However, because of the committee's claim that the Township's Housing Assistance Plan (HAP) was insufficient, HUD insisted on major changes in the plan.

FINDINGS AND CONCLUSIONS OF THE DEMONSTRATION PROJECT

A major finding of this demonstration was that citizen-based monitoring teams cannot be expected to use standard procedures to address local problems. The Coalition found the teams gave widely varying emphasis to the four problem areas specified by the objectives. This was attributed, in part, to the fact that each team had the flexibility to select the issues to be addressed and, in part, to the differing composition of the monitoring teams. Also cited by the Coalition were the differences in style of leadership and access to the political system among the team leaders.

The Coalition made the following observations about the effectiveness of citizen-based teams monitoring CDBG activities:

- The citizen-based team approach to CDBG monitoring is more likely to produce change that is mutually agreeable to both the community's residents and its officials, both elected and appointed, than the more remote and legal approach traditionally used by the Coalition.
- Local officials are more likely to agree to work with citizens on an ongoing basis than with a "watchdog" organization with a vested interest in the decisions that are made.
- Citizens have more direct clout. A properly mobilized contingent of active, informed, and concerned citizens can get faster results and greater concessions than an outside organization.

In addition, the Coalition made a number of process-related conclusions based on the activities conducted by the teams and the structure and functioning of the teams, including:

- Some of the outcomes achieved would have occurred in any case as a result of HUD intervention. However, the monitoring process provided a "documentary record" to support the changes made and will

provide a precedent for future efforts to bring about program changes.

- An average of 10 to 15 volunteers worked with the monitoring teams, allaying fears at the project's inception that active support from citizens might not be forthcoming. This led to the conclusion that the only inhibiting factor with greater impact was limitation of existing funds for the project.
- Lack of information and knowledge about housing issues and poor communication about problems were identified as serious barriers to creating change or generating improvements. This was true of potentially influential supporters as well as public officials, who were found in many instances to know nothing about housing assistance and fair housing, not to mention the statutory and regulatory requirements of the block grant program.
- Public officials were more willing to work "behind the scenes" than to make public pronouncements of their intentions to support assisted housing or fair housing.
- Citizen-based monitoring cannot be standardized completely from jurisdiction to jurisdiction and, in fact, successful attraction of volunteers can be attributed to flexibility when dealing with housing opportunities issues as they appear at the local level.
- Resources required to conduct a citizen-based program should not be underestimated. Even though volunteers were used, the project concluded that one paid staff person to every two part-time community organizers (each with 10 to 15 volunteers) would be ideal.

FAIR HOUSING COUNCIL OF BERGEN COUNTY
HACKENSACK, NEW JERSEY

The Fair Housing Council of Bergen County felt the key to attract minorities to a suburban area's nonintegrated communities was to reach these potential home- and apartment-seekers at a crucial point in their housing search--before they start looking. The affirmative fair housing demonstration developed by the Council combined a program of research into the attitudes of minority apartment-seekers and homebuyers with the testing of selected low-cost techniques designed to recruit minority residents to Bergen County. An "early intervention" counseling program was designed to broaden the range of housing options offered to minorities in nonintegrated areas.

DEMONSTRATION PROJECT ACTIVITIES

Marketing Research Study

To determine where outreach efforts to minorities could be made most profitably, the Fair Housing Council conducted a market research study using a combination of research techniques. The project's final report indicated the types of questions they sought to answer:

- How does a minority family interested in buying a house in the suburbs begin its search?
- What are their criteria for the "perfect" house or neighborhood?
- What media sources do they turn to for information?
- How do they select a broker?
- What type of promotional literature appeals to them?
- What, if any, are their anxieties about moving into white neighborhoods and how can they be met?
- How aware are they of the discriminatory techniques they may face and their rights under the civil rights laws?

The two activities used to gather relevant data were: (1) to survey literature and knowledgeable individuals regarding black consumerism and attitudes of minorities toward homebuying and (2) to conduct telephone interviews with black Council clients who had completed a housing move or currently were being assisted by the Council's housing staff. Publications were sampled and conversations were held with representatives of the business and academic communities. A questionnaire

was developed by the project staff and interviews were conducted with 24 minority Council clients (16 homebuyers and 8 apartment-renters) to determine their motivations for moving, their awareness of racial, religious and economic attitudes in Bergen County, and when and how they began their housing search.

The information gathered from the survey and the interviews with minority clients was used to develop a recruitment program to attract minority homeseekers. Effective recruitment techniques were identified and census data were used to determine the locations of large concentrations of potential minority homeseekers to be targeted for recruitment.

Recommendations

Using the information gathered from the preliminary research, recruitment materials and activities were designed to reach the targeted population; a profile of the prospective minority homeseeker was developed and a time schedule to conduct the recruitment program was established. The decision was made to aim the recruitment program at urban minorities with incomes more than \$15,000 per year, particularly family units. The following recruitment techniques were developed on the basis of the information gathered during the preliminary research effort:

- Newspaper Advertising: A series of advertisements were placed in two newspapers with different readerships (a widely read New York daily and a civil service weekly); later, two additional newspapers were included to increase response.
- Direct Bulk Mailings: Promotional materials were mailed to areas of minority concentration within the targeted geographic areas. Mailings were also made to seven New York metropolitan area corporate relocation firms and to membership lists of fourteen black fraternal and professional organizations.
- Personal Distribution of Promotional Materials: The final step in the development of the recruitment program involved the utilization of former Council clients and Council members in the New York metropolitan area to distribute brochures and make contacts with potential clients.

Advertising and outreach activities were implemented by the project staff during the six-month period between April 1 and October 1, 1978 (traditionally the period of heaviest housing market activity).

During the first three months, 44 advertisements were placed in the New Jersey housing classified advertising section of the four chosen newspapers. Concurrently, a brochure was designed which stressed the variety

of amenities associated with Bergen County and the services offered by the Fair Housing Council. The brochure was sent by bulk mail to approximately 4,000 individual residents of three apartment complexes in New York City that census data had identified as having heavily black populations with moderate to high incomes (i.e., potential homeseekers).

Direct mailings were also made to seven corporate relocation firms (one specifically for minorities) located in New York, New Jersey and Connecticut. They were requested to direct any minority clients to the Council for housing and discrimination counseling. Finally, the brochure, return post cards and cover letters were mailed to 3,500 members of 14 black fraternal and professional organizations in the New York/New Jersey area.

Word-of-mouth advertising by Council members, friends and clients comprised an important part of the recruitment effort. These individuals were contacted at the beginning of the recruitment campaign and asked to distribute brochures to anyone who might be interested in Bergen County. The Council enlisted 75 volunteers who distributed approximately 4,000 brochures.

Early Intervention Program

An "early intervention" counseling program was designed to furnish the clients attracted by the recruitment campaign with the following information: (1) greater knowledge of the range of housing opportunities in the County and (2) methods of detecting discrimination practiced by members of the real estate industry that restricted client access to these opportunities. Examples of discriminatory acts include steering to integrated areas within the County and steering away from nonintegrated areas. The Council felt an early intervention counseling program would result in a lower incidence of discriminatory actions by real estate agents and apartment managers due to increased awareness and sophistication on the part of the minority home- or apartment-seeker. The Council could then determine the effect of its intervention to open more geographically dispersed housing opportunities to minorities.

New clients recruited through the outreach program received the housing counseling services regularly offered by the Fair Housing Council. The housing counseling program of the Council emphasizes the preparation of the client for a variety of discriminatory actions which he/she may encounter during the housing search and encourages the client to seek the widest possible range of housing choices (particularly those in nonintegrated neighborhoods). Three additional questions were included on the regular client intake form for the demonstration:

- What special recruitment technique brought you to the Council?
- At what point are you in your housing search (beginning or not beginning)?

- What is your race (black, white, nonwhite)?

White respondents were given the full initial counseling and sent housing materials; however, no personal follow-up was conducted. Included in the housing materials was information on housing available in integrated neighborhoods.

The following areas were covered in the counseling program:

- An evaluation of the client's housing needs with an assessment of availability of housing matching those needs
- Geographic descriptions of various Bergen County communities and available amenities
- An evaluation of the client's financial situation with financial counseling, if necessary
- An explanation of relevant federal and state laws concerning housing
- A description of the Fair Housing Council escort service (staff or volunteers who accompany the client on a housing search)
- Names of brokers and guidance to find a broker, if necessary

Counseling was accomplished over the telephone or, preferably, face to face. After the initial interview, the client received housing counseling material and suggestions of possible homes or apartments in the specified price range. The client was then requested to maintain contact with the counselor throughout the housing search.

Follow-up contacts were made at least twice with each recruited project client to check on housing search progress, answer questions, refer listings and provide any additional assistance. The Council provided investigatory and legal options to clients encountering discrimination and provided referrals to other housing assistance agencies, lending institutions and lawyers.

FINDINGS AND CONCLUSIONS OF THE DEMONSTRATION PROJECT

The project staff was able to conclude from the survey research that the combination of employment opportunities and suburban amenities form the impetus to increase black migration to suburban areas. They also concluded suburban housing costs were not a strong deterrent to minority moves and knowledge of the existence of a fair housing group encourages the minority family unfamiliar with the area and, in many

cases, is vital to select housing offered to them. The research found that a variety of appeals must be stressed by fair housing groups to prospective minority homeseekers, including: (1) advantages of suburban lifestyle, (2) lower housing costs, (3) home purchase as a financial investment and (4) greater employment opportunities. The Council concluded that a continuous outreach effort is needed to increase significantly housing opportunities for minorities.

Distribution of the brochure, both by direct mail and personal distribution by FHC members and former clients, was the most successful recruitment technique. Brochures attracted 73 percent of the respondents to the Fair Housing Council. Newspaper advertisements attracted the remaining 27 percent of the recruited clients. The largest newspaper response came from the widely read New York Daily News; the lowest response came from the Civil Service Weekly. No clients came to the Council from the mailings to the seven corporate relocation firms.

The Council calculated the cost effectiveness of each recruitment technique to determine the average cost-per-client response. The highest cost-per-client responses were the advertisements in the Civil Service Weekly (\$95.20), followed by ads in the New York Times (\$77.15), New York Post (\$56.16), the brochure distribution (\$31.90) and the New York Daily News (\$14.55). Brochure distribution had an average cost-per-client response only half that of all newspaper advertising combined; the Council concluded that the brochure was the most successful technique used in the demonstration.

In evaluating newspaper advertising as a recruitment technique, the project staff concluded to run ads regularly over an extended period of time was as important as identifying the newspaper that would best reach the target area. They found running ads over an extended period substantially increased the cost-effectiveness. Since the project was unsuccessful recruiting clients through mailings to area relocation firms, they concluded that a long lead time was needed before referrals would be received from such organizations. They stressed the need for "nurturing" the contact over a period of time with personal follow-up activity by the fair housing organization.

The project staff found the early intervention counseling program was successful to broaden the range of housing options offered to minorities as well as to enable minority home- and apartment-seekers to recognize discriminatory practices by apartment managers and real estate brokers. The project staff stated that the ability to recognize discrimination constitutes "a crucial first step toward obtaining equal housing opportunity."

Five alleged incidences of discrimination, three by apartment-seekers and two by homebuyers, were reported by project clients. Of the five clients, four were at the beginning of their housing search. The project staff felt although the numbers were small, the potential effectiveness of the early intervention program to increase the awareness of

minority clients of the treatment they are receiving from brokers was demonstrated. The Council does not have exact figures on the number of complaints reported by project clients. According to the Council's associate director, the project clients reported more instances of discrimination than the average Council client and concluded it was probably because of their heightened awareness of discriminatory practices.

SUFFOLK HOUSING SERVICES

LAKE GROVE, NEW YORK

As a rule, a racial audit is used to assess whether housing in an area is available on an equal opportunity basis to both white and minority homeseekers. Suffolk Housing Services (SHS) defined the logistics of an audit as follows:

To make this assessment, matched teams of volunteers or "testers," one white and one minority, will visit real estate offices or landlords in the area posing as home-seekers. The testers will report carefully what information and service is given them and what housing is offered to them. These reports are then to be compared to determine differences which could only result from difference in the testers' race. The results from an audit can then be used in a variety of ways to further fair housing from simply publishing the results to using them in litigation.

SHS maintained the traditional racial audit is not useful for assessing differences in housing opportunity between low-income minorities and low-income whites. Low-income people are unable to afford the housing and are disqualified immediately from consideration on the basis of income without regard to race. Therefore, SHS proposed to use an innovative approach to audit and document racial discrimination against low-income minority homeseekers.

All the families in the project were required to be Department of Social Services (DSS) clients. This criterion was chosen by project staff to ensure uniformity in the relocation process for all families participating in the audit. DSS participates in a move if the move meets the following four conditions: (1) the move is necessary, (2) the rent for the proposed housing is at or below the maximum shelter allowance set by New York State for Suffolk County, (3) the security deposit required for the proposed housing does not exceed an amount equal to one month's rent and (4) there are no brokers' fees required to obtain the proposed housing ("emergency" situations allow up to \$100 for brokers' fees). If any one of these four conditions is not met, DSS will deny the housing move request.

DEMONSTRATION PROJECT ACTIVITIES

Beginning in January 1978, the first 20 welfare families of two or more persons who called Suffolk Housing Services each month and who had DSS's permission to move were selected as audit participants. A closed case or completed move consisted of four phases:

1. Identification of family for participation in audit; assessment of housing needs; referral to housing resources

2. Visit to audit family in initial housing; assessment of living conditions
3. Follow-up interviews with audit family to record housing search experiences
4. Visit to family in new housing; assessment of conditions and neighborhood

Only closed cases or completed moves were used in the final analysis of audit results.

For each family selected to participate in the audit, an intake form noting pertinent housing needs was completed by an SHS housing counselor. The forms were reviewed by an audit specialist hired to conduct the audit, who then visited each family in their current housing. During the site visit, the current housing and neighborhood conditions were assessed and information about the client's previous homesearching experiences was recorded.

The audit specialist encouraged client families to call SHS for housing leads and information during the housing search process. Audit participants were given leads on current housing vacancies, compiled by SHS housing counselors from local newspapers and weekly "catalogues" of rental properties. The number of referrals was limited by the tight housing market existing in Suffolk County. Information on the rent, size, location and amenities of listed rental properties was given to the client. All housing referrals were recorded in the client's file.

Contact was maintained with the audit participants throughout the housing search process. The experiences of each family pursuing housing leads were recorded during follow-up conversations conducted by the audit specialist. When the family secured new housing, a follow-up visit was made by the audit specialist to determine the condition of the client's new housing, the condition and racial composition of the new neighborhood and the family's initial experiences in the new neighborhood. Complete information on how the family obtained the unit also was gathered.

The Audit Outcomes

From January to November 1978, 220 audit cases were opened by SHS staff. The opened cases consisted of 87 black families and 133 white families. The final audit analysis was based on the closed cases of 75 families, 46 white and 29 black.

To determine the type of housing obtained by the 75 audit families and differences between the results for black and white families, the following variables were analyzed:

- Racial composition of neighborhood
- Housing condition

- Terms under which housing was secured
- Amount of rent
- Referral source

Each of these variables is explained in the following paragraphs.

Racial Composition

Housing moves by both black and white families followed the traditional patterns of segregation, with the majority of white audit families (72 percent) finding housing in predominantly white neighborhoods and nearly all of the black audit families (97 percent) finding housing in neighborhoods which were predominantly black or integrated.

Housing Condition

Housing condition was rated "good," "fair" or "poor" by the audit specialist. "Poor" was defined as dwelling units with malfunctioning heat, electrical, gas or plumbing systems or structural defects. "Fair" was defined as dwelling units with major systems functioning but lacking adequate insulation or ventilation or were overcrowded. If none of these conditions existed, the dwelling unit was rated "good."

A majority of the housing obtained by white families was rated "good" (72 percent) with the remainder (28 percent) considered in "fair" condition; no housing units secured by white families were in "poor" condition. In contrast, nearly two-thirds of the housing obtained by black families was either in "fair" (41 percent) or "poor" (21 percent) condition.

Terms of Rental

The terms under which a family secured their housing rental were significant factors in comparing the housing choices of white families with those of black families. DSS requires all families to submit a Housing Request Form (HRF) before approving relocation assistance money. The HRF must state the rental cost of the unit and the amount of security required. The broker must verify in writing that his/her fee does not exceed \$100 and the form must be signed by the new landlord and broker. If any of the verified amounts are higher than DSS required terms, the housing request is denied.

Forty-two of the 75 audit families rented housing under terms which did not conform to DSS regulations. The HRF was inaccurate for 57 percent of the the white audit families and 48 percent of the black audit families. DSS would not have approved the housing had the correct information been submitted. The project staff made the following comment on the different impact of these actions on black and white families:

Where both black and white families rented their housing under nonapprovable terms, there is a significant

difference in how the families met the housing costs which weren't covered by DSS. Given the fact that in the population at large, blacks are disproportionately represented in lower income levels, it is not surprising that white welfare recipients can more often meet these additional costs with the help of relatives than can black welfare recipients, who must use their food and clothing budgets.

Housing Rental Amount

Approximately one-third of both black and white audit families paid rents in excess of the maximum shelter allowances set by DSS. In these cases the landlords and brokers involved verified false terms on DSS forms and the clients paid the amount above the maximum allowance out of the public assistance money they received for basic needs such as food and clothing or with money received from relatives. The significance of the nearly identical percentages of black and white families paying rents above the maximum shelter allowances was explained by project staff in this statement:

. . . Of our audit families, the black families pay as much for poorer quality housing in black neighborhoods as the white families pay for better quality housing in white neighborhoods.

Referral Sources for Housing

The major sources for black families were word-of-mouth (34 percent) and real estate brokers (31 percent). For white families, the largest single source was real estate brokers (28 percent), with personal word-of-mouth referrals occurring much less frequently (15 percent) in the housing search process.

After grouping the audit families by size and comparing the housing search process for white families with that of black families in the same size category, the project staff concluded that "the housing available to white families on public assistance is not available to black families on public assistance despite the fact that all families are on the same economic level, have the same financial resources with which to find housing and must go through the same designated procedures of the Department of Social Services to secure housing."

The only way audit families could rent housing not meeting DSS requirements was with the cooperation of a real estate broker and/or landlord to verify false rents, security deposits or brokers' fees on the Housing Request Form. While not condoning the falsification of information, project staff maintained that discrimination occurred when unequal treatment was given to white and minority welfare families by real estate brokers and landlords. It was more difficult for a minority family to receive cooperation from brokers and landlords to verify false information on DSS housing forms than for a white family, putting them at a distinct disadvantage in the housing market.

A similar problem existed when minority families were interested in renting garden apartments. Most of the garden apartment complexes required a security deposit equal to two months' rent. Since DSS would not allow recipients to pay more than one month's rent for a security deposit, the family was put in the position of persuading the management to accept one month's rent or sign a false HRF and have the client pay the second month's security deposit from other funds. Project staff stated this situation disproportionately discriminated against the minority families, since they were less likely to receive cooperation from the management by virtue of their race. In addition, if they did receive cooperation, it was more difficult for a minority family to obtain the money to pay the second month's security deposit than a white family.

Results of the audit also showed that black families overwhelmingly moved to black or integrated neighborhoods. The contributory factor appears to be the reliance of minority families on personal or word-of-mouth referral. As pointed out by project staff: "It is unnecessary to explain why black families who must find housing by referral of friends and acquaintances rarely move into white neighborhoods."

SHS FINDINGS AND CONCLUSIONS OF THE DEMONSTRATION PROJECT

Throughout the audit process, two procedures were monitored closely and documented by project staff to determine discriminatory practices:

- The way in which the housing unit was obtained (different requirements for black and white families in financial arrangements)
- The relationship between the client and the Department of Social Services (different procedures for black and white families)

The project staff maintained the audit results showed widespread discrimination against black welfare families in search of housing. SHS determined shelter allowance maximums and policies on brokers' fees and security deposits need to be changed to reflect realistic market conditions in Suffolk County.

In order to change DSS policies, SHS plans to bring the project results to the attention of local, state and federal social service officials. In addition, the project staff has drawn parallels between the operation of the Section 8 housing program and the welfare housing system in Suffolk County. They point out that the processes are identical in both programs and they produce similar problems for low-income homeseekers, stressing that the identical restrictive factors which operate in the New York State social service policies are present in the Section 8 program.

HOUSING ASSOCIATION OF DELAWARE VALLEY

PHILADELPHIA, PENNSYLVANIA

The Housing Association of Delaware Valley (HADV) proposed to investigate and analyze the manner in which fair housing programs serve low- and moderate-income families. Using information obtained through monitoring and data collection efforts, HADV worked with its affiliate members of the Ad Hoc Committee for Housing and Community Development to develop and employ strategies designed to increase goal achievement in four selected housing assistance programs.

DEMONSTRATION PROJECT ACTIVITIES

Assessing the City's Community Development Programs

Collecting data to determine the effectiveness of the city's assisted housing programs for low- and moderate-income families was perhaps the most difficult undertaking for HADV. The largest problem was the lack of response of the agencies implementing the programs. Specifically, it was difficult to determine what the Section 8 and Gift Property Programs were accomplishing or failing to accomplish because they refused to provide any information regarding income level, family size or racial characteristics of persons participating in the programs. Furthermore, the only information provided by the city's Community Development Block Grant Office concerned fund allocations, and much of this information was misleading. Finally, because of the suspension of board meetings by the Urban Homesteading Program early in the demonstration period, HADV project staff were unable to monitor the selection of homesteaders.

As documented in their demonstration report, findings of monitoring efforts were as follows:

- Urban Homesteading Program: This program acquired 277 properties during the year, 142 of which (or slightly more than half) were selected for occupancy or were actually occupied by families. No information was obtained regarding the income of the recipients of these properties. This program was under federal investigation at the end of the demonstration period.
- Gift Property Program: The program accepted 144 tax delinquent and HUD-repossessed properties. Most houses were transferred to qualified families at a fairly rapid pace.

- Section 8 Rent Subsidy Program: It was virtually impossible to assess the activities of this program. Program administrators would not provide information on income level, family size or racial characteristics of Section 8 participants.
- CDBG Loans and Grants Program: Of the 474 homeowners qualifying for housing rehabilitation under this program, approximately 275 have received repair work. This program was at a virtual standstill while under federal and local investigation. At the end of this demonstration period, more than \$3,000,000 of the Loans and Grants Program allocation for Year III remained unspent.

Assessing Goal Achievement in Year III

Another major area for data collection and assessment was performance of the city relative to the state goals in its Housing Assistance Plan for Year III of the community development program. The findings from this effort were to be used to identify ways the demonstration project could impact upon goal achievement in Year IV.

Several shortcomings of the CDBG program in Year III were documented by HADV in its report on goal achievement:

- For the first three years of the community development program, there was a goal to award 2,038 loans and grants; as of January 1978, only 486 had been made (only 24 percent of the total goal).
- The rehabilitation program had a three-year goal of 592 units. By the end of 1977, only 129 had been rehabilitated. This represented only 22 percent of the goal but 41 percent of the allocated money was expended.
- More money was spent on administering programs than producing results and, in many cases, allocated funds were not spent at all. For example, though slated for \$870,000 in housing funds, north central Philadelphia received virtually none of its Year III allocation.

HADV found the most significant result of Year III performance was areas heavily populated by minorities either received minimal services or were excluded totally from services. Their conclusions were supplemented by HUD findings in a civil rights investigation of the community development program in Philadelphia. HUD found areas of the city with the

largest concentration of minority persons and female heads of household were not receiving appropriate allocations and resources, manpower and finances and that programs were being directed away from the neediest areas.

For example, HUD calculated that white neighborhoods received four times as much money for rehabilitation grants as black neighborhoods. Using a dollars-per-acre scale, the disparity between nonimpacted (white) and impacted (black) areas is \$276 to \$131, or 2 to 1, again in favor of nonimpacted areas. HUD also corroborated another complaint from north central Philadelphia residents when its investigation found the city was concentrating on demolition and code enforcement in minority areas which, without other essential resources, do not necessarily lead to neighborhood revitalization. This finding was added to evidence already accumulated and HADV concluded many areas in the city were being allowed to deteriorate in order to be "recycled." HADV defines this term as the process of turning neighborhoods from low-income and minority into middle- and high-income areas through extensive rehabilitation.

HADV reported that Year III fell far short of anticipated performance and quoted the director of the city's Office of Housing and Community Development in his introductory comments in the Community Development Block Grant Performance Summary dated August 16, 1978, "I am well aware that many of these programs exist primarily on paper and in budget allocations and have not as yet made a visible impact on the neighborhoods." Based on this conclusion, HADV, in cooperation with the Ad Hoc Committee, developed its strategies to impact on Year IV. performance.

Working to Impact Upon Community Development Goal Achievement

It was decided by HADV and the Ad Hoc Committee that they would expend their energies advocating for those neighborhoods which were excluded from all community development plans. Activity centered around two major issues: (1) the city's performance meeting goals and (2) the inclusion/exclusion of given geographic areas from the program. In its approach to effect the level of goal achievement for Year IV, HADV and the Ad Hoc Committee employed a fourfold strategy: analysis, testimony demonstration and confrontation.

Based on analysis of past and present program years, the Ad Hoc Committee members traced the pattern of community development program operations and expenditures and concluded the programs did not reduce "slums and blight" in the areas most affected. Ad Hoc Committee members testified in the mandated neighborhood public hearings, City Council hearings and at the area, regional and national levels of HUD.

Perhaps most important were the tactics of demonstration and confrontation. Given the city administration's insensitivity to minority citizens and the visible and vocal neglect of minority concerns, the Committee knew that simply "presenting its case" would not be sufficient;

the Committee mobilized community support to confront those responsible for implementation of housing policies.

In the spring of 1978, the Committee called for a boycott of a new shopping mall, "The Gallery," which had been built with money that "could and should have been used for housing." More than \$32 million in federal and local funds had been allocated for the mall. The Committee's ability to mobilize people, bolstered by the Committee's refusal to believe the same city agencies that could build and finance a multimillion-dollar project downtown could not build or rehabilitate houses drew support from neighborhood organizations.

In its report, HADV cited allegations of nonperformance in programs for the neighborhood revitalization and development from a highly critical report issued by Philadelphia's city controller. Focusing on the Urban Homesteading and Loans and Grants Programs, both under the jurisdiction of the Office of Housing and Community Development (OHCD), the controller's report detailed several "inadequacies and inefficiencies" in program operations. This report noted the Urban Homesteading Program included "payment for work poorly performed, partially performed or not performed at all," and mentioned the "callous disregard of the complaints of homesteaders regarding poor and shoddy work." The investigation found "80 percent of the contractors' invoices were altered by OHCD personnel," within the Loans and Grants Program. The alterations were in the form of changed dates on the invoices prepared by contractors and proved that OHCD was cognizant of and responsible for long delays in implementing the programs.

Another strategy implemented by the Ad Hoc Committee members to impact on Year IV performance involved registering protests at city Council hearings regarding the proposed Year IV allocation since previous years' dollars had not yet been expended. The group scheduled a meeting with HUD officials to request release of compliance findings in HUD's investigation of the city's performance and petitioned for Year IV funds to be placed in receivership. The results of the compliance investigation showing discrimination were released; however, the request for receivership was denied. The city increased its CDBG housing allocation from the Year III level of \$870,000 to \$4 million in Year IV. The increase was based on a needs assessment of the north central Philadelphia target area for the demonstration. Unfortunately, at the end of the project there was little promise that the increased funds actually would be spent, since the Year III monies still were dormant.

FINDINGS AND CONCLUSIONS OF THE DEMONSTRATION PROJECT

HADV attempted to document the severity of the housing situation for low-income families in Philadelphia. They found in each of the four years of Philadelphia's CD program, funds had been allocated based on an assessment of the needs of the low-income communities the program was designed to serve, yet monies were used to benefit primarily middle-income

neighborhoods. At the end of the demonstration, HADV believed they had been the force behind a 500 percent increase in CDBG budget allocations for targeted low-income and minority neighborhoods.

ORANGE COUNTY FAIR HOUSING COUNCIL
SANTA ANA, CALIFORNIA

The Orange County Fair Housing Council (CFHC) developed and tested fair housing brochures and two low-cost audiovisual filmstrips to increase public awareness of fair housing laws and housing discrimination practices.

DEMONSTRATION PROJECT ACTIVITIES

Development of the Audiovisuals
and Brochures

Two- and eight-minute synchronized-sound audiovisuals entitled "Housing Discrimination" were produced. The purpose of the two-minute film was to increase public awareness of fair housing laws. The film was shown continuously in areas of high and low pedestrian traffic, such as shopping malls and offices of social service agencies. The eight-minute film was shown at meetings with selected audiences and was accompanied by a 30-minute presentation by an Orange County Fair Housing Council representative. Audiences included citizen advisory groups, savings and loan executives and members of the real estate industry.

Both the two- and eight-minute films were slide presentations incorporated into a video cassette that could either be projected onto a screen or shown on a unit with a self-contained screen. The eight-minute show presented in detail the concept of housing discrimination and housing rights. It discussed the types of people discriminated against, fair housing laws and how an individual could seek help if he/she had been subjected to discrimination. The two-minute show gave an overview of the eight-minute version, emphasizing actions to be taken in the event housing discrimination was encountered.

The eight-minute film was reviewed and critiqued by an audience of 350 people at a workshop. According to the Fair Housing Council, this was the first time in the history of Orange County representatives from real estate agencies; colleges and high schools; city, county and state governments; private fair housing groups; financial institutions; and churches and consumers met to discuss ideas to promote fair housing. Questionnaires were disseminated after the viewing and were completed by 80 percent of the workshop participants. Responses to the presentation were overwhelmingly positive and constructive suggestions were provided to improve the filmstrip.

Following the pretest, revisions were made to the film in accordance with suggestions from the group. The two-minute segment was produced from the eight-minute version and both were developed in English and Spanish. A brochure was also prepared in both English and Spanish entitled "Housing Discrimination: Your Personal Rights." The brochure discussed housing discrimination and gave an overview of the services of the Orange County Fair Housing Council.

After the films and brochures had been refined and made ready for distribution, OCFHC proceeded to use the materials to test their effectiveness with the general public and selected target groups.

Showing and Assessing the Two-Minute Audiovisual

To test the use of film in high pedestrian situations, the two-minute film was shown at the Orange County Fair and the Latin Fair. OCFHC reported that more than 120,000 persons saw the film. It was also exhibited at Community Awareness Day at a local college; OCFHC estimated that 1,200 students viewed the film.

One proposed high pedestrian activity was to show the short film in shopping malls; however, the project was unable to get any mall administrators to agree to this arrangement. Administrators were concerned that granting one request for free exhibit space would lead to numerous similar requests for space for which a charge is assessed ordinarily.

For testing low pedestrian traffic, the two-minute film was shown in social service agency lobbies and waiting areas; however, the agencies were unable to document the number of people who viewed the film under these circumstances. OCFHC did receive increased inquiries as a result, since caseworkers referred their clients to OCFHC for assistance with a variety of housing-related problems.

By the time the project had ended, several savings and loan institutions had agreed to allow OCFHC to set up the two-minute display in their facilities.

OCFHC intended to conduct a mass media campaign and have the film shown on television. This did not take place because resources were not available to reproduce the film in videotape form for television.

Showing and Assessing the Eight-Minute Audiovisual

The eight-minute filmstrip was designed to be shown to smaller audiences in a group setting such as a meeting or classroom to supplement a verbal presentation about fair housing. Seven target populations were given presentations tailored to the groups' interests and functions as they related to fair housing. The following are brief descriptions of the use and effect of the film with the various target groups.

Real Estate Industry

The objective was to improve public relations between the real estate industry and fair housing groups. OCFHC brought together six local boards of realtors for a showing of the film. Reactions of viewers indicated real estate agents would benefit more from a detailed presentation of how fair housing laws affect homesellers, instead of homebuyers depicted in the film.

Even though fair housing was not always of interest to real estate agents, contacts and discussions with them led to the development of a seminar on anti-discrimination regulations and affirmative marketing. This seminar has been approved by the Department of Real Estate as a part of their continuing education program for real estate license renewal.

Financial Institutions

The purpose of the film presentation with this group was to encourage financial institutions to show the two-minute audiovisual to customers waiting for service.

After viewing the presentation, the executives of two institutions--Savings and Loan Management and California Savings and Loan--expressed a willingness to contribute financial backing to produce an audiovisual combining the concepts of affirmative lending and fair housing. OCFHC would provide technical assistance by providing content and expertise on fair housing and the film would be displayed in branch offices during business hours. Implementation of this innovative program would help savings and loan institutions meet their lending requirements. No action was taken before the demonstration ended.

Corporations

Fifty corporations allowed OCFHC to show the film. Managers viewed the film at executive meetings while other employees viewed it during their lunch hour. The goal of showing the film to corporations was twofold:

- To encourage management and equal opportunity officers to support fair housing as a logical extension of their affirmative action programs, i.e., Equal Employment Opportunity/Equal Housing Opportunity
- To provide a consumer education tool for employees

The executives would not commit themselves to promote fair housing by providing financial backing to develop a film combining equal employment opportunity with equal housing opportunity, but did agree to conduct fund-raisings for affordable housing as a means of increasing public awareness of the problem.

No action in this area was documented by OCFHC before the demonstration was completed. The employees were less receptive to the film, and apparently resented having the film presented during their lunch hour.

Local and County Government

OCFHC's objectives with this group were to solicit funds to conduct housing studies and provide anti-discrimination and fair housing services. Although the original target group included state and local governments, OCFHC decided focusing on local and county governments would yield more positive results. More than 30 presentations were made to local governments through citizen advisory committees, planning commissions, city councils and the staff of the Housing and Community Development Block Grant Program. Twenty local jurisdictions formally committed \$137,000 to the OCFHC for the upcoming fiscal year.

Educational Institutions

The major thrust in the project's initiative with schools and colleges was to use the film in classrooms to increase student awareness of fair housing issues and to test the educational effectiveness of the film with pre- and post-tests. This research was conducted in three classes, each 45 minutes in length. Two classes were on the high school level while the third was on the junior college level. According to the project director, the use of pre- and post-tests was not as effective as was anticipated to measure the amount of knowledge gained by the students, who not only lacked interest but felt the tests insulted their intelligence because of the simplicity of the film.

As a result of experiences with using the audiovisual in educational institutions, OCFHC reassessed its approach. Rather than focusing on the time-consuming task of teaching the students, it was concluded that a more effective approach would be to train the teachers and encourage them to implement courses on housing where teachers would have the time to discuss with the students their own particular housing problems, as well as fair housing laws.

Private Fair Housing Groups (PFHGs)

Essentially, OCFHC's goal was to encourage other private fair housing groups to use films as a means to increase public awareness of fair housing practices, solicit funds from local governments and train volunteers in correct "testing" procedures to document cases of discrimination. All PFHGs in Southern California viewed the film.

Distributing Fair Housing Brochures

Brochures were distributed at all eight-minute audiovisual presentations and two-minute audiovisual showings. The brochures were also sent to individuals on selected mailing lists in several local communities. Little response was obtained from the individuals who received the material. OCFHC concluded the lack of response was due to general disinterest and consumers' tendency not to read "junk" mail. Distributing brochures at the audiovisual showings and presentations was much more effective because the initial interest had already been established.

OCFHC'S FINDINGS AND CONCLUSIONS OF THE DEMONSTRATION

During the course of the demonstration, OCFHC continually promoted the idea that the audiovisuals could be adapted easily for use with different audiences. Only a "voice over" is needed to change the information conveyed or to translate into other languages and OCFHC found that various types of organizations thought with some modifications the films would be more persuasive.

Overall, the two-minute film was considered by OCFHC to be more versatile. The brevity of the two-minute version seemed to have a more direct impact on the viewer. OCFHC found that the two-minute version worked best with service organizations, employers and community groups. The eight-minute version was found to be best suited to train testers, orient citizens, present to city councils and to educate students in an academic setting.

METROPOLITAN WASHINGTON PLANNING AND HOUSING ASSOCIATION

WASHINGTON, D.C.

In 1972, the Department of Housing and Urban Development issued fair housing advertising guidelines to facilitate and promote compliance with Title VIII of the Civil Rights Act of 1968. These guidelines recommended the use of a fair housing statement (e.g., "An Equal Opportunity Builder") and the now familiar equal housing opportunity (EHO) logo (a symbol depicting a house containing an equal sign). For HUD-insured or subsidized housing, the advertising guidelines were incorporated into HUD's Affirmative Fair Housing Marketing Regulations, making adherence to the guidelines mandatory for such housing. However, advertising guidelines do not have the force of the law and are not mandatory for other types of housing. The first contact between buyer and seller often occurs when a homeseeker reads a housing advertisement. Therefore, Metropolitan Washington Planning and Housing Association (MWPHA) chose to focus upon efforts to increase the number of nondiscriminatory ads used for both HUD-related housing and housing where the guidelines are not mandatory.

DEMONSTRATION PROJECT ACTIVITIES

Major activities of the demonstration project were:

- Background research on the use and effects of display advertising
- Design and conduct of affirmative advertising seminars
- Monitoring of display advertising to determine changes in use of the EHO logo and minority models

Researching the Use of Display Advertising

To establish the level of use of the EHO logo and minority models in display advertisements, data were collected on ads published in the spring and fall of 1977 in the two major metropolitan area newspapers. From October to December 1977, MWPHA conducted general background research on the use and effects of real estate display advertising. The following types of baseline data were collected:

- Number of developers/advertisers using display ads in 1976 and 1977 during fall and spring "Festival of Homes"
- Number using logo

- Number using models
- Number and types of ads with racial "steering" content, including examples
- Number and descriptions of communities/developments that are targets of racial "steering" practices

Information on ads published during 1977 served as the baseline against which to measure findings from the demonstration period during 1978, when the action component of the project was carried out.

A real estate ad-monitoring process was designed to identify the subtle indicators used by real estate developers and advertisers that influenced the buying patterns of whites and minorities.¹ After careful examination of newspaper display ads, project staff were able to identify certain communities in the Washington, D.C., SMSA which were the targets of racial steering practices. Steering was defined by MWPHA as the practice by housing sellers of methods designed to attract minority prospects to minority or transitional areas and, additionally, the discouragement of minorities from homeseeking in predominantly white or nonintegrated areas. Similarly, steering is applicable to whites if methods serve to discourage them from seeking housing in minority or transitional areas, or if certain techniques are used which imply that an area is "exclusively" for whites.

Gaining Support for the Project

Using the information obtained through the initial research component, MWPHA implemented a series of activities designed to increase fair advertising in the two major newspapers, including mailing letters to advertisers and conducting fair advertising seminars. As a first step, MWPHA sought to involve organizations having influence with developers and advertising agencies to promote increased use of the EHO logo and minority models.

Agreements were reached with the Metropolitan Washington Council of Governments (COG), Suburban Maryland Fair Housing and the National Capital Inter-League Organization (League of Women Voters) to cosponsor the seminars. With the assistance of COG, MWPHA prepared a special booklet, "Affirmative Advertising: Attracting Minority Homebuyers Through the Use of Display Advertisements," for use at the seminars. The Washington Post did not act as a cosponsor, but did help to design the seminar booklet and sent advertising representatives to the seminars.

¹This research was supplemented by the findings of an earlier study of the equal opportunity aspects of display ads for new housing in Washington's daily newspapers entitled Fair Housing/Unfair Advertising (1975)

Project staff stated that although the participation of these organizations had no direct effect on the advertising practices of developers, the reputations of the organizations (particularly The Washington Post and COG) did help to lend credibility to the seminars.

Monitoring Activities

To advocate increased use of the EHO logo and minority models by developers/advertisers in display ads in the two metropolitan area newspapers, MWPNA sent letters to 415 builders, brokers and advertisers during the first week of April 1978. The purpose of this letter was to inform these individuals and organizations of MWPNA's ongoing program to promote affirmative advertising and to urge them to use the EHO logo and ads showing minority and white models in the upcoming special spring homes advertising sections of The Washington Post and The Washington Star. The letter also informed them of the affirmative advertising seminars to be held the following month. To measure the impact of the letter on the advertising practices of area builders and brokers, MWPNA monitored the display advertisements in the Post and the Star during the two-week 1978 Spring Festival period (approximately four to six weeks after the letters were mailed and prior to the affirmative advertising seminars). Display ads were monitored again during the Fall 1978 Festival, following the affirmative advertising seminars. The monitoring results from both the spring and fall of 1978 were then compared with data collected during 1977 and the findings from MWPNA's earlier study on affirmative advertising practices (1975). This enabled MWPNA to determine changes in the number and percent of advertisers using the EHO logo and minority models over a three-year period (1975 and 1978).

Affirmative Action Seminars

The action component of the demonstration project consisted of three affirmative advertising seminars conducted for metropolitan area builders, brokers and advertising agencies by MWPNA during the latter part of May 1978. The purposes of the seminars were: (1) to encourage the use of the EHO logo and minority models in display advertising and (2) to elicit commitments for assistance in promoting the concept of equal access to housing throughout the metropolitan area. The same 415 individuals and firms that received letters were sent invitations to the seminars. To minimize conflicts with the invitees' schedules, the seminars were held on three different days. A total of 48 persons attended the seminars, excluding MWPNA and COG staff. Project staff commented in the final report:

Although the number of attendees was disappointing, a number of large and potentially influential firms--for example, Ryan Homes, U.S. Homes, Long and Foster, Miller and Smith, Shannon and Luchs--attended the seminars. It should also be remembered that builders and brokers are not anxious to undertake affirmative advertising programs. At best, they are interested in complying with the

requirements of the law, and most do not think of non-discrimination requirements as applying to their advertising practices. To most firms equal opportunity means not discriminating against potential homebuyers who actually seek to purchase a housing unit at the builders model home display.

The special booklet prepared by MWPHA and COG on affirmative advertising practices included a brief discussion of the Fair Housing Act of 1968 and the Advertising Guidelines for Fair Housing and provided some data about the minority market in the metropolitan area. The majority of the booklet was devoted to the presentation and discussion of a number of sample display ads using minority and white models for hypothetical housing developments.

Each seminar participant was provided with a kit containing, in addition to the booklet, a list of minority media in the area, copies of affirmative marketing materials from Palm Coast (a Florida development of the ITT Corporation) and from the Valley Experience (a service of the San Fernando Valley Board of Realtors and San Fernando Valley Fair Housing Council in the Los Angeles area), and recent newspaper articles about fair housing in the Washington area.

Each of the seminars was designed to cover the same materials, although a representative of ITT Community Development Corporation presented a report on the firm's successful affirmative marketing program at Palm Coast, Florida, at the third seminar. Because research by MWPHA showed that between 60 and 70 percent of display ads in Washington's daily papers used the EHO logo, the seminars concentrated on the use of both minority and white models in housing advertisements.

MWPHA FINDINGS AND CONCLUSIONS OF THE DEMONSTRATION PROJECT

The objective of this project was to increase the use of the EHO logo in housing display advertisements and to increase the use of minority models in housing display ads. Project findings indicated that the use of the EHO logo in display ads did increase by ten percent. Results clearly show there was no increase in the use of minority models by area developers/advertisers between 1977 and 1978.

This demonstration project produced the following useful information and documents:

- Summary of data and information on display advertising practices in the Washington, D.C., metropolitan area
- Seminar design and materials, including the booklet, "Affirmative Advertising: Attracting Minority Homebuyers Through the Use of Display Advertisements"

APPENDIX B

DEMONSTRATION PROJECT ADDRESSES AND CONTACTS

- Updated data and comparative data on display advertising practices among developers and advertisers

Using the materials and procedures compiled by MWPNA, fair housing groups across the country could increase awareness and improve affirmative advertising practices in their own communities.

APPENDIX B

AFFIRMATIVE FAIR HOUSING DEMONSTRATION PROJECT

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