

# Participatory Action Research Project Kit: Wall Street Landlords

Since 2013, there has been widespread media coverage of Wall Street's emerging REO-(Real Estate Owned)-to-rental market, also known as the "single-family home rental market," and new, untested, corporate revenue streams through rental securitization and, most recently, landlord loans. This phenomenon has commonly been referred to as the rise of "Wall Street landlords," and until recently, there has been little research into how this affects people who rent.

In May of 2015, [Tenants Together released a report](#) on our survey of California tenants living in properties owned and managed by the state's largest Wall Street landlords: Blackstone/Invitation Homes (over 5,000 homes in California in early 2015), Waypoint Homes (approximately 2,500 homes), and Colony American Homes (approximately 2,000 homes).

## We Need Your Help:

Tenants Together reported evidence that Wall Street landlords charge higher than median rents and put the burdens of homeownership on tenants (making tenants do maintenance & repairs), while tenants get none of the benefits. However, only 75 of the 7500 tenants we reached out to completed our survey. Our initial findings raised red flags, but **we need more data in order to make a stronger policy case for change.**

Many of the homes rented by Wall Street landlords are in cities without rent control, however, even if these cities had rent control state law would prevent their tenants from being protected. State law Costa Hawkins Rental Housing Act exempts condos, single-family homes and homes built after 1995 from being included in a rent control law. Wall Street specifically targeted these kinds of homes where profits are unregulated. We need to organize tenants that live in these homes to stand up to Wall Street landlords and change the policies that allow them to reap unlimited profits at the expense of our communities. You can help us reach out to tenants renting single-family homes in your community by conducting a participatory action research project on the role of big investment companies in the rental market.

## What is Participatory Action Research (PAR)?

The grassroots research organization, Datacenter, defines PAR as a method of reclaiming research (source: [guide to Participatory Action Research](#)). This form of research has roots in the settlement house movement of the 19<sup>th</sup> century (Jane Addams's Hull House) and third world communities in the struggle for liberation (Paolo Freire's *Pedagogy of the Oppressed*). In these traditions the lines between researcher and community members are blurred, often they are one and the same, and community experience drives the research.

### Participatory Research and its process:

Synthesizes the collection and use of knowledge – research and action

Breaks down the artificially imposed wall between researcher and researched

Restructures power relations in the research process

Ensures that knowledge gained through research roots personal experiences in the context of the political and social structures that shape them

Honors the knowledge and strengths within our communities

Furthers our struggles for justice

In the U.S., community-based participatory research has been used in the civil rights, women's, immigration, labor, anti-war and environmental justice movements.

### Participatory Research leads to:

Base-building

Leadership Development

Campaign Strategizing

Organizing Strategizing

### Participatory Research can:

Inform the group's long term strategies

Reach out to the community and build membership

Inform policy recommendations or need for media work



## Research project goal

Our goal in developing this guide is to help you gather more data that measures the impact of Wall Street landlords on tenants and rental markets so that state and local governments will take action in passing effective regulations. In addition to this important goal, you might ask yourself/ your group, “What other goals might we have for this research project?” “What are the big issues facing tenants in our community that we would like to change?”

## Expected outcomes

Throughout this campaign you will engage tenants renting from Wall Street landlords and alert decision-makers to any problems the community encounters with how tenants are being treated. Take your research to city and state representatives to demand they become champions for strengthening tenant protections. Your research can help build a broader base of active tenants holding these decision-makers accountable if you connect your work with specific policy demands. Be sure to stay connected with Tenants Together to help inform our statewide work and coordinate with other groups of tenants in California.

## Resources:

Our research project began with developing a survey that would alert us to tenants’ rights violations and assess the conditions of the property. We heard anecdotal evidence of Wall Street landlords refusing to make repairs and making tenants live in slum conditions, so focusing on property conditions was a response to this concern. Your community may have different concerns you need to focus on. Therefore, we encourage you to conduct several discussion sessions with your team to assess your community’s needs. Remember, PAR centers on place-based research, which is grounded in the unique perspectives and experiences of the local community.

### *Guides on creating surveys:*

- DataCenter: <http://www.datacenter.org/wp-content/uploads/creatingsurveys1.pdf>
- The 10 Commandments For Writing Outstanding Survey Questions: <http://www.qualtrics.com/blog/good-survey-questions/>
- Guidelines on ethics, confidentiality and oral consent: <http://sites.duke.edu/ethicsmodules/category/skill-building/>

Writing survey questions is a process. Write, review, test, and revise your questions and introductory scripts as many times as needed.

### **Avoid:**

- Technical terms and jargon
- Vague questions
- Complex questions
- Double-barreled questions (two questions in one)
- Biased or leading questions
- Negative vs. positively framed item stems (“Not eating fruits is unhealthy” vs. “Eating fruit is healthy”)



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**Include:**

- Reference frames (all responders should refer to the same time and place)
- All possible response options
- Mutually exclusive response categories
- Balanced response scales
- “Don’t Know” and “Prefer Not to Answer” options, if appropriate
- Focused – addressing your specific questions and only including questions that are essential to know.

*Resource: the survey we developed for tenants renting from Wall Street*

<https://tenantstogether.typeform.com/to/fWFWCt>

Our survey is also attached at the end of this document. If it makes sense for your community, you can copy the survey entirely or add/remove questions as you see fit.

**Building a Mailing List:**

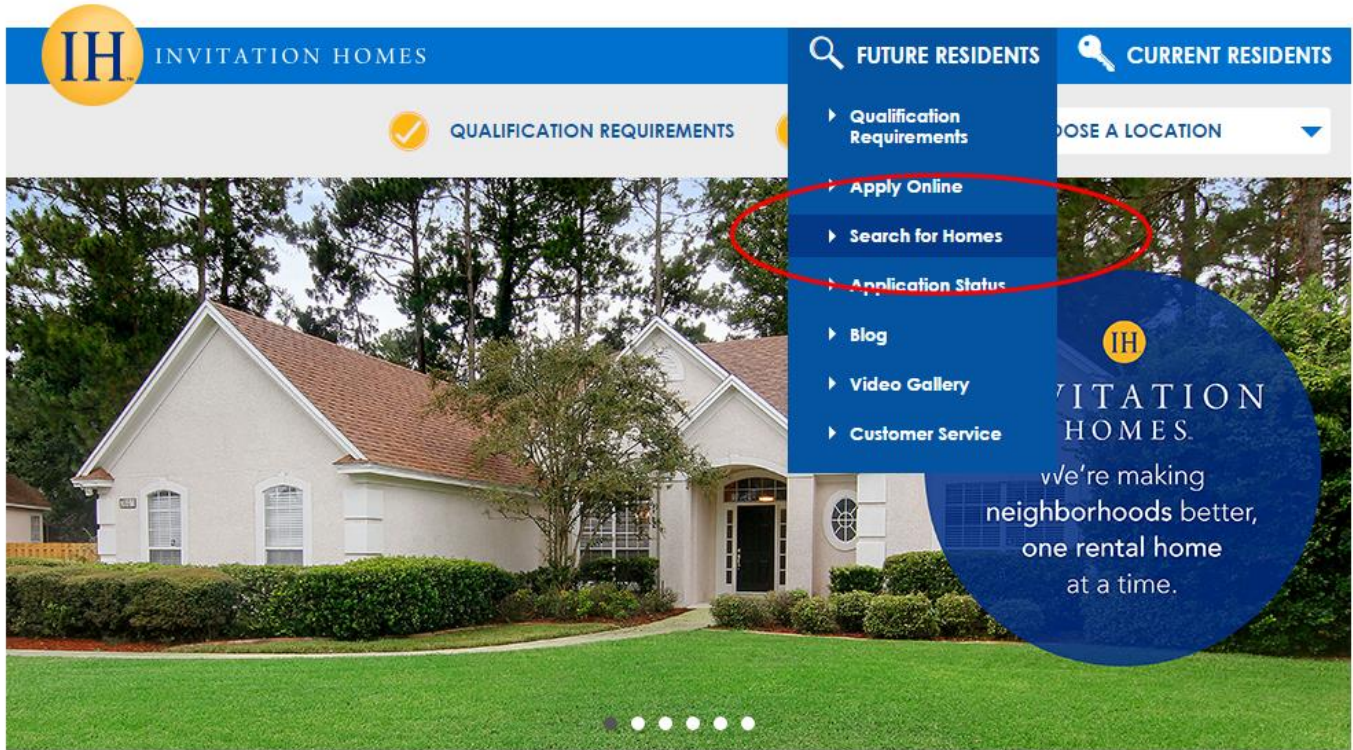
The most time-consuming part of the survey process was building a mailing list for tenant outreach. We needed to find tenant-occupied homes owned by the three Wall Street landlords in question. The first difficulty lies in the obfuscation of ownership information. Each investor incorporates their holdings under many Limited Liability Companies, commonly known as LLCs. No property simply lists "Invitation Homes" or "Blackstone" as the owner. Ownership information of a home is public data through a county recorder-assessor's office, but it is fairly easy for corporate landlords to form an LLC and list this as the owner of record. It is difficult to trace an LLC to the parent company Blackstone, Waypoint, or Colony American. There is no requirement, federal or state, for these corporations to publically list all of the LLCs under which they do business. How do you find out if an LLC owner is not just any investment company, but is a Wall Street landlord? How can you measure the effect of a Wall Street landlord in a community without knowing how many properties they own and in what neighborhoods?



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We started by conducting a backwards search of properties listed for rent on each landlord's website.



1 28578 SW 131st Court \$1495

**COMING SOON** **Address:** 28578 SW 131st Court, Miami, FL 33033 **Beds:** 3 **Baths:** 2 - 2 **Sq. ft.:** 1855 **Type:** Home [Apply Now](#)

Bird's Eye View Street View Brochure Neighborhood  Add to Favorites

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2 24715 Sw 110th Avenue \$1525

**COMING SOON** **Address:** 24715 Sw 110th Avenue, Homestead, FL 33032 **Beds:** 4 **Baths:** 2 - 2 **Sq. ft.:** 1788 **Type:** Home [Apply Now](#)

Bird's Eye View Street View Brochure Neighborhood  Add to Favorites

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3 8926 Sw 222Nd Terrace \$1795

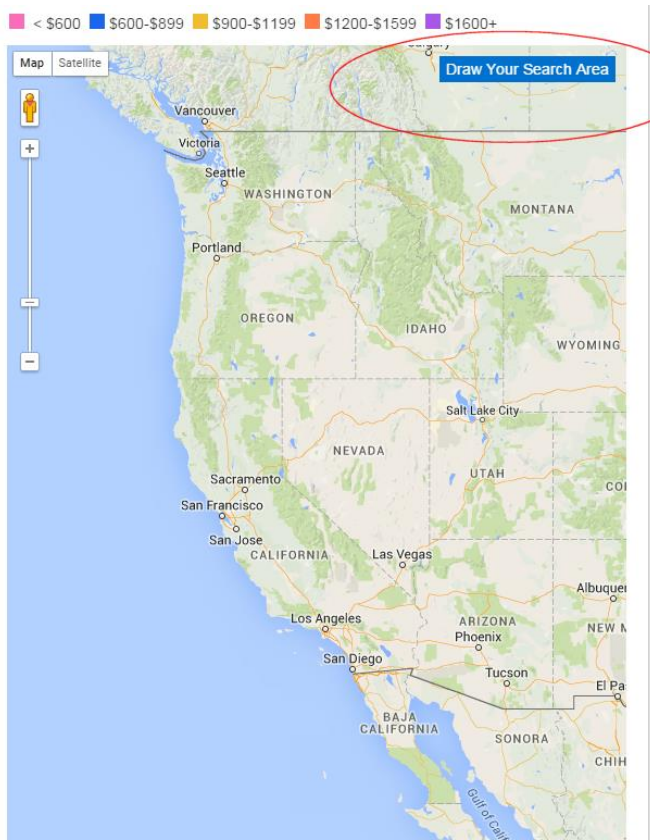
**COMING SOON** **Address:** 8926 Sw 222Nd Terrace, Miami, FL 33190 **Beds:** 3 **Baths:** 2 - 2 **Sq. ft.:** 1716 **Type:** Home [Apply Now](#)

Bird's Eye View Street View Brochure Neighborhood  Add to Favorites

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4 22206 Sw 89th Court \$1895

**COMING SOON** **Address:** 22206 Sw 89th **Beds:** 4 **Baths:** 2 - 2 [Apply Now](#)



**7** 23798 Via Olivia
**\$1870**

**Address:**  
23798 Via Olivia  
Murrieta, CA 92562

**Beds:** 3  
**Baths:** 3 - 3  
**Sq. ft.:** 1425  
**Type:** Home

Apply Now

Bird's Eye View Street View Brochure Neighborhood
 Add to Favorites

**8** 28314 Adrienne Street
**\$1784**

COMING SOON  
APPLY NOW!

**Address:**  
28314 Adrienne Street  
Riverside, CA 92563

**Beds:** 3  
**Baths:** 3 - 3  
**Sq. ft.:** 2096  
**Type:** Home

Apply Now

Bird's Eye View Street View Brochure Neighborhood
 Add to Favorites

**9** 27768 Elderberry St
**\$2332**

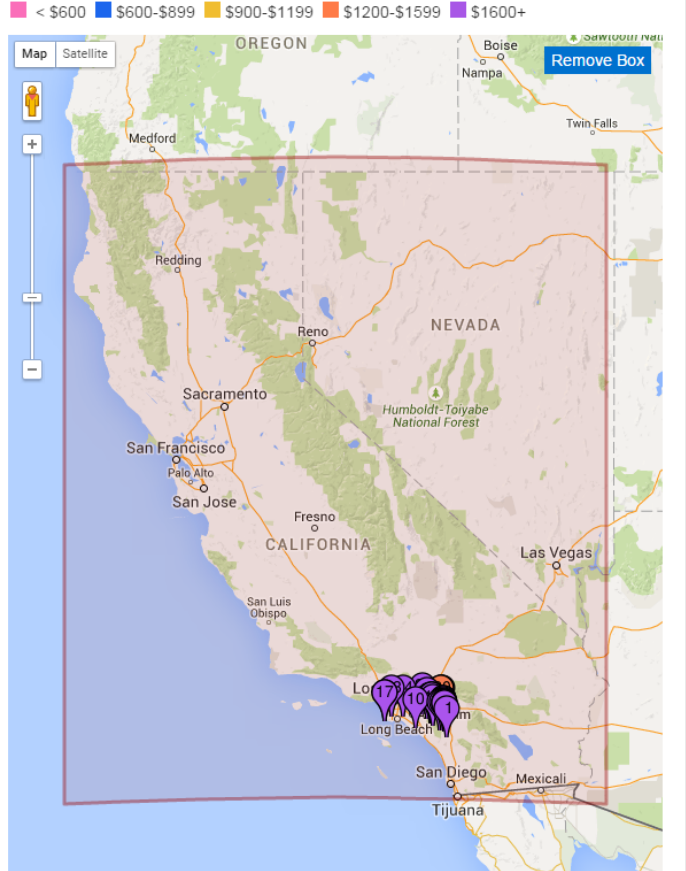
**Address:**  
27768 Elderberry St  
Murrieta, CA 92562

**Beds:** 4  
**Baths:** 2 - 2  
**Sq. ft.:** 2945  
**Type:** Home

Apply Now

Bird's Eye View Street View Brochure Neighborhood
 Add to Favorites

**10** 24251 Fordview St
**\$3059**



For instance searching for 27768 Elderberry St. from Invitation Homes' website reveals that 2014-2 IH BORROWER LP was one of the ownership names they registered properties under in the State of California.



Home > Murrieta, CA > 27768 Elderberry St

Rental Information

Invitation Homes  
27768 Elderberry St  
Murrieta, CA 92562  
(855) 716-7368

Share

Pet Policy

Pets - allowed

**Restrictions:** Breed & Exotic Animal  
& Restrictions Apply.

Professionally Managed By

Invitation Homes

27768 Elderberry St

eBrochure Share With a Friend Contact Print

Add to Favorites



Dashboard



- Property Search
- Foreclosure Search
- Trustee Sale Schedule
- Transfer Search
- Listing Search
- Explore

Saved Properties

Filter

Summary	Status	Tags	Interest	Activities	Saved / Updated
Total	113 Screen	43 dogpound	43 ★★★★★	20 Recently Sold	8 Today 0
With Tags	100 Take Photo	0 Coffin	27 ★★★★★	0 Underwater	13 Past 7 Days 0
With Photos	0 Contact Owner	24 initial contact	20 ★★★★★	1 In Foreclosure	6 Past 30 Days 0
With Notes	0 Check Value	2 canvass	9 ★★★★★	0 Listed	4 Past 90 Days 0
With Analysis	1 Research Title	0 target	1 ★★★★★	0 TS Auction Today	0 Past Year 29
With Title Data	3 Submit Offer	0	★★★★★	92 TS Auction Tomorrow	0 Older 84

Saved Searches & Alerts

Edit

Quick Search

Resources

Name	Last Run	Alerts
Blackstone IV	6/22/2015 7:36pm	!
Blackstone V	3/19/2015 7:17pm	!
Blackstone III	3/17/2015 3:25pm	!
Blackstone II	3/17/2015 3:25pm	!
Blackstone	3/17/2015 3:24pm	!
Waypoint IX	3/9/2015 2:58pm	!
Waypoint VIII	3/9/2015 2:57pm	!
Waypoint VII	3/9/2015 2:56pm	!

Property

Address or RadarID  GO

Owner

Last, First  GO

WATCH VIDEO

**Transitioning from Old App to New App**





## Interactive Property Profile

27768 ELDERBERRY ST, MURRIETA, CA 92562

### Property Details

Type: SFR - RSFR	Use Code: R1	County: RIVERSIDE
Year Built: 2005	Zoning:	APN: 392-240-081
Beds: 4	Units: 0	Radar ID: P1268C0E
Baths: 2	Rooms: 0	Subdivision:
Sq Ft: 2,945	Garage: No	Census: 043278
Lot Sq Ft: 6,534	Pool: No	Tract: 0
Lot Acres: 0.2	Fireplace: Yes	Lot: 66
Stories: 2	HVAC: Yes	Parcel Map: <a href="#">Purchase</a>
Legal: .15 ACRES ML IN LOT 66 MB 344/001 TR 29640-9		

### Status

Estimated Value: \$415,095    Listed for Sale: No  
Loan Balance: \$5,327,617    In Foreclosure: No  
Est. Equity: -\$4,912,522    Owner Occupied: No

Status:

Tags:

### Ownership

**2014-2 IH BORROWER LP**  
901 MAIN ST STE 4700  
DALLAS, TX 75202

Transfer Date: 5/16/2012  
Purchase Amount: \$300,100  
Down Payment:  
Transfer Type: TrusteesDeed-3rd

### Owner Search

### Tax Assessment

Total Value: \$307,900		Annual Taxes: \$5,309	As of: 2014
Land Value: \$61,477		Est. Tax Rate: 1.7%	Tax Rate Area: 24277
Improvements: \$246,423		Owner Exempt: No	Lookup Taxes: <a href="#">County Website</a>

### Market Value

### Listing Details

Listings:

Listing Type: Rental    List Price: \$2,332  
Listing Date: 7/10/2015    Days on Market: 33  
Listing Status: Active    [View Listing Details](#)  
Listing ID:

### Map

Searching for any homes owned by 2014-2 IH BORROWER LP then produced hundreds of results. This is the start of a mailing list to tenants renting from Invitation Homes.

We used the online service Property Radar because it aggregates publically available data from county assessor-recorder offices. Property Radar can search for properties in California, Oregon, Washington, Nevada, and Arizona. Another service that works similarly, Propertyshark.com, is available nationally in a limited number of metropolitan areas. Traditionally, to find this information you would have to contact each assessor-recorder office individually, and they may only provide info for a single property in question, rather than detailed information on multiple properties.



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# Property Search

ST, MURRIETA, CA 92562

CA

Search Options

Search

Save

Property Details

Value & Equity

More

My Data

Summary

- Commercial
- Industrial
- Agricultural
- Land
- Other
- Unknown

### Characteristics

Beds	Min	Max
Baths	Min	Max
Square Footage	Min	Max
Lot Size (SqFt)	Min	Max
Lot Size (Acres)	Min	Max
Units	Min	Max
Year Built	Min	Max
Age (Years)	Min	Max
Stories	Min	Max
Pool	Any	
HVAC	Any	

### Ownership

Owner Name	2014-2 IH BORROWER LP
Phone Number	Any
Primary Residence	Any
Owner Occupied	Any
Same Mailing Address	Any
Same County	Any
Same State	Any
Mailing Address	
Mailing City	
Mailing Zip Code	

< Dashboard

# Property Search

Address or City(s) or Zip(s) or RadarID(s)

CA

Foreclosure

Transfer

Listing

Location

Property Details

Value & Equity

More

State California

County(s) Select...

City(s)

Zip Code(s)

Street Name

Address Number Min Max

Odd or Even Any

Street Direction Prefix Any

Street Direction Postfix Any

Address

Map

Radar ID(s)

APN(s)

Subdivision

Tax Rate Area



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View property: 27768 ELDERBERRY ST, MURRIETA, CA 92562

Type	Address	City	Sq Ft	Beds	Ba...	Est. Equit...	Owner	Owner Occu
<input type="checkbox"/>	646 ARDEN AVE	GLENDALE	1,305	3	1	-591%	2014-2 IH BORROWER LP	No
<input type="checkbox"/>	644 MYRTLE ST	GLENDALE	784	2	1	-951%	2014-2 IH BORROWER LP	No
<input type="checkbox"/>	335 N CHEVY CHASE DR	GLENDALE	690	2	1	-755%	2014-2 IH BORROWER LP	No
<input type="checkbox"/>	490 RAYMOND DR	PASADENA	1,116	3	2	-610%	2014-2 IH BORROWER LP	No
<input type="checkbox"/>	754 N KENMORE AVE	LOS ANGELES	1,821	4	2	-521%	2014-2 IH BORROWER LP	No
<input type="checkbox"/>	6071 HAROLD WAY	LOS ANGELES	1,422	3	2	-357%	2014-2 IH BORROWER LP	No
<input type="checkbox"/>	1344 W 83RD ST	LOS ANGELES	1,767	3	2	-945%	2014-2 IH BORROWER LP	No
<input type="checkbox"/>	1558 W 84TH PL	LOS ANGELES	1,260	2	1	-1,002%	2014-2 IH BORROWER LP	No

Going through this process for each of the Wall Street landlords in early 2015 produced a list of 5000 properties for Invitation Homes, 2500 properties for Waypoint Homes, and 2000 properties for Colony American Homes.



## Bonus Research: We Found the Securitized Properties

At the beginning of our research, we were informed by a number of researchers that it might be impossible to find out if a property was included in a securitized pool ([read our report](#) for more information about securitization of rents and what it could mean for tenants). While this was not the crux of our research question, we were curious if it could be done. In the future, we thought it might be useful to be able to compare how tenants renting properties in a securitized pool are treated versus ones that are owned outright.

Through our research, however, we were able to find a method to determine if one particular property is included in a large securitization pool. It is amazingly simple. We noticed in looking up ownership information using Property Radar, that some properties had huge loans taken against them. These loans matched the public reporting of the value of a securitized pool. For instance, if the fictitious 123 Banana St had a First Loan that equaled \$479,137,000, and the owner was listed as 2013-1 IH BORROWER (one of the names Invitation Homes uses in their ownership recordings), then we knew from public reports of the rental-backed securitization package that this home was included in the Invitation Homes first package of 2013. We cross-checked other million-dollar loans with reports of securitization offerings and came up with a pool of 1786 homes in the state that are included in a securitization package. Our discovery of this simple method is an important tool that will enable further research of the impacts of securitization on tenants.

Interactive Property Profile ▼

27768 ELDERBERRY ST, MURRIETA, CA 92562

Housing	Climate	Economy
Median Price: \$286,600	Elevation: 1,419.9'	Cost of Living:
Median Rent: \$1,495	July High/Low: 100 / 58°	Unemployment:
Single Family: 78%	Jan High/Low: 68 / 35°F	Businesses:
2-4 Units: 3%	Precipitation: 11.1"	Govt Employees:
5+ Units: 15%	Snowfall: 0"	Sales Tax Revenue:
Avg Unit Age: 15 years	Avg Wind Speed:	Sales Tax Rate:
Owner Occupied: 70%		

**Transaction History**
Original, Edited, Added, Deleted !

Current Owner
Open Loans
All Transactions
Foreclosure Notices

Type	#	Document	Party	Name	Amount/LTV	View
Loan	1	317982	Borrower	2014-2 IH BORROWER LP	\$719,935,000	
CashOut		8/21/2014	Lender	GERMAN AMERICAN C...		

**View / Edit Document**

Type: Loan ▼

Rec Date: 8/21/2014 📅

Party 1: 2014-2 IH BORROWER Borrower ▼

Party 2: GERMAN AMERICAN C Lender ▼

**My Files**
+ -

File Name	Size

**Foreclosure Details**

Foreclosure Details
Select Past Notice... ▼

**No Active Foreclosures**

Type your note here. +

Copy To: ▼

## Naming Wall Street Landlords

The following is a partial list of known LLCs that Wall Street landlords are doing business under. Until state or federal governments require transparency of ownership information, community groups like Right to the City Alliance, Tenants Together, and allied researchers have been doing the hard work to piece together what we know. The following list is not proprietary. If you are doing your own research, let us know if you find new LLCs we can add to the list.

### Blackstone/Invitation Homes:

*Some securitized:*

29 SAC HOLDINGS  
29 SAC HOLDINGS 1  
29 SAC HOLDINGS 1 CA  
29 SAC HOLDINGS I  
29 SAC HOLDINGS I LP  
29 SAC HOLDINGS I LIMITED PARTNERSHIP  
29 SAC HOLDINGS II  
29 SAC HOLDINGS ONE LIMITED PARTNERSHIP  
THR California  
THR California LLC  
THR CA LIMITED PARTNERSHIP  
2013-1 IH BORROWER  
2014-1 IH BORROWER  
2014-2 IH BORROWER  
2014-3 IH BORROWER

*Not securitized:*

IH2 PROPERTY WEST LP  
IH3 PROPERTY WEST LP  
IH4 PROPERTY WEST LP  
IH5 PROPERTY WEST LP

### American Homes 4 Rent:

AH4R CA 11 LLC  
AH4R-CA 11LLC  
AH4R-CA11 LLC  
AMER HOMES 4 RENT  
AMERICAN HMS 4 RENT PROPS ONE  
American Homes 4 Rent  
AMH 2014-1 BORROWER LLC (not currently in California)  
BEAZER PRE OWNED HOMES LLC  
SSI NV LLC

### American Residential Properties:

AMERICAN RESIDL LEASING CO  
AMERICAN RESIDENTIAL PROEPRTIES  
AMERICAN RESIDENTIAL PROPERTIES

### Silver Bay Property Corp:

2012-B PROPERTY HOLDINGS  
THPI ACQUISITION HOLDINGS

### Starwood-Waypoint Homes:

AMARILLO HOMES LLC  
BLUE KAHANA LLC  
BLUE OASIS LLC  
BONGA HOLDINGS LLC  
CARRBRIDGE LLC  
COCOBOLO PROPERTIES LLC  
CRAIGE LLC  
DALLIN  
DALLIN LLC  
DC REAL ESTATE FUND II LP  
DC REAL ESTATE GROUP LLC  
DOGWOOD HOMES LLC  
ESPAVE HOLDINGS LLC  
GUADUA LLC  
IBIS HOMES LLC  
JADEITE LLC  
JOSHUA TREE HOMES LLC  
KESTREL HOMES LLC  
LEAF PROPERTY HOLDINGS LLC  
LOUDEN LLC  
NORTHERN NEON OPERATIONS LLC  
PRIVATE PINNACLE LLC  
QIS LLC  
ROSECOMP LLC  
SRP SUB LLC  
TINBLE LLC  
WIEL BRIEN FUND III LP



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### Colony Financial:

Colfin AL-CA 5LLC  
Colfin AI-CA 5 LLC  
Colfin AI-CA 5 LLC ETAL  
Colfin A1 CA 5 LLC  
Colfin AI-CA 4 LLC  
Colfin AH California 7 LLC  
Colfin A1-CA 4 LLC  
Colfin AI CA 1 LLC  
Colfin AH-Arizona 3 LLC  
Colfin AL AZ 1 LLC

Colfin AI AZ 1 LLLC  
Colfin AI AZ 2 LLC  
Colfin AL-AZ 2 LLC  
Colfin AH CA 7 LLC  
Colfin AH-California 6 LLC  
CSFR Colfin American Invtrs trust  
Colfin AH California LLC  
Colfin, AI CA 4  
Colfin AI & CA LLC  
Colfin, AI CA 4  
AH-CALIFORNIA 7 LLC

## Strategic considerations

Tenants Together is committed to supporting tenant advocacy and organizing. Through this participatory action research project, we hope new tenant groups and associations will form. Attached is a guide to forming tenant associations. We encourage new tenant associations to join Tenants Together as member organizations, so they can benefit from being connected to a statewide network of organizers and advocates. Together we build power for changes at the state level. One issue particularly relevant to tenants renting from Wall Street in California is that state law, the Costa-Hawkins Rental Housing Act, prohibits single-family homes from being regulated by rent control. We hope to change this and other problems for tenants at the state level. If you would like to join as a member organization, please contact Dan Harper our Organizing Director at [dan@tenantstogether.org](mailto:dan@tenantstogether.org).

## Who will do the research?

Tenants should lead the research and tailor the questions they want answered to their community needs, but they don't need to be the only ones doing the research. At some point, you may need help conducting surveys, analyzing data, or writing a report. Attached is a guide to developing a position description to recruit help. This is just a framework for how to communicate what kind of help you need and how you would like people to participate. Perhaps you need a lot of boots on the ground and would like to recruit for survey volunteers to canvass neighborhoods. You could also recruit student interns from a Public Policy or Sociology program to help analyze your survey results. While it isn't necessary to partner with schools or allied organizations, working with others will generate more interest in your results and give your efforts more clout.

## Who is your audience?

Participatory Action Research is conducted to make change for communities and build power. Who will help you make that change? For Tenants Together's report released in May 2015, we made sure that key members of the California State legislature got copies of the report and read our recommendations for legislative change at the state level. When you have your results, [reach out to decision-makers](#) like these and also your Congressional representatives, city council members, or county board of supervisors. There are solutions at every level that could be pursued.



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These decision-makers also pay attention to what gets coverage in the media. Reach out to your local media about your research, results, and stories of tenants you have been talking to. Place an op-ed in your local paper calling for solutions to the problems your community faces.

*Resources: [Tenant Guide to Speaking to the Media](#)*

*[Community Toolbox guide on Media Advocacy](#)*

## Translation

California is a diverse state and many residents don't speak English as their first language. To paint a true picture of what is happening in your community; you may need to translate materials like your survey, results, or publications. Your group may have the skills to do so, but if you need help finding translators, we have found these sources to be reliable:

Volunteer-Match:

<http://www.volunteermatch.org>

Translations For Progress:

<http://www.translationsforprogress.org>

## Data analysis

Many Graduate-level University Public Policy programs partner with the community to analyze data. Once you have conducted your survey and you have at least a 10% response rate, the results will be relevant to the media and decision-makers. You have done a great job! You may not need help analyzing and packaging your results into a compelling format, but if you would like to seek help here is a brief guide:

1. Ask your local college or university if any staff conduct participatory action research projects (PAR). Fields connected to tenant work could be Urban Planning, Geography, Sociology, and Political Science.
  - a. If not PAR, ask if there is a service learning or critical service learning program that staff and students participate in.
  - b. Share basic information about your project like how many surveys completed, how many volunteers involved in the project, what decision-makers you have outreached to, etc.
  - c. If you find a match, be clear that this is a community-driven research project and that the school or university you are partnering with is obligated to respect the leadership of the tenants involved.



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## Attachments: sample survey, guide to forming tenant associations, and sample volunteer position description

This survey text was developed by Tenants Together for Wall Street landlord report.

1. First name:
2. Last name:
3. Street:
4. City:
5. Zip code:
6. Phone number:
7. Email address:
  
8. Which Wall Street investment company owns the home you rent?
  
9. Do you know the name of the property management company your landlord employs?
  
10. How long have you lived at your home?
  - a. Less than 1 year
  - b. 1-2 years
  - c. 2-5 years
  - d. 5-10 years
  - e. 10-15 years
  - f. Over 15 years
  
11. Type of Original Rental Agreement
  - a. Written
  - b. Verbal
  
12. Term of Current Rental Agreement:
  - a. Month-to-month
  - b. Fixed-term lease
  
13. If fixed term, what date does it expire?  
Please format as example: 1/1/2001
  
14. How much is your current rent per month?
15. How much was your security deposit?
  
16. Do you have a Section 8 voucher?
  - a. Yes
  - b. No



17. Before you moved to this address did you rent or own?

- a. Rented
- b. Owned
- c. Other

18. If you owned before you moved here, how much was your home worth at purchase?

- a. 25,000 - 75,000
- b. 75,000 - 100,000
- c. 100,000 - 200,000
- d. 200,000 - 300,000
- e. 30,000 - 400,000
- f. 400,000 - 500,000
- g. Over 500,000
- h. N/A

19. If you owned before you moved here, how much was your home worth when it was sold or foreclosed?

- a. 25,000 - 75,000
- b. 75,000 - 100,000
- c. 100,000 - 200,000
- d. 200,000 - 300,000
- e. 300,000 - 400,000
- f. 400,000 - 500,000
- g. Over 500,000
- h. N/A

20. Did you look to buy a home in this area?

- a. Yes
- b. No

21. Would you have purchased this home had you had the option?

- a. Yes
- b. No



22. What items were requested during the rental application process (check any that apply):
- a. Background check
  - b. Credit check
  - c. Application fee
  - d. Holding deposit fee
  - e. Nonrefundable holding deposit
  - f. ID required
  - g. Employment verification
  - h. References
  - i. Social security number
  - j. Other
23. In the application, were you asked if you had previously been evicted?
- a. Yes
  - b. No
24. In the application, were you asked if you had ever been convicted of a misdemeanor?
- a. Yes
  - b. No
25. In the application, were you asked if you had ever been convicted of a felony?
- a. Yes
  - b. No
26. Has your current landlord ever threatened to evict you?
- a. Yes
  - b. No
27. Have you received any of the following notices in the past year from your current landlord:
- a. 3 day pay or quit
  - b. 3 day correct or quit
  - c. 30 day eviction
  - d. 60 day eviction
  - e. 90 day eviction
  - f. Rent increase over 10%
  - g. Rent increase under 10%
  - h. N/A
28. Does your landlord require you to pay rent in cash or online?
- a. Requires cash payment
  - b. Requires online payment



- c. Doesn't require these
29. What is the fee for paying rent late?
- a. Less than \$25
  - b. \$25 - \$50
  - c. \$50 - \$100
  - d. More than \$100
  - e. No late fee
30. Have you ever been charged or billed for a late fee?
- a. Yes
  - b. No
31. If you ever paid a late fee, can you estimate the total amount in late fees you have paid to this landlord?
32. Have you ever been behind on paying rent to your current landlord?
- a. Yes
  - b. No
33. If you have been behind on rent, was your current landlord willing to work out a payment plan?
- a. Yes
  - b. No
34. What do you have to pay for in addition to your monthly rent? (check any that apply)
- a. Water
  - b. Gas
  - c. Electric
  - d. Phone
  - e. Internet/Cable
  - f. Yard maintenance
  - g. Pest control
  - h. Security system Garbage
  - i. Other
35. Does your landlord make the repairs you request?
- a. Yes
  - b. No
36. How many days on average does it take to get repairs done?
37. Have you ever had to do the repairs yourself?
- a. Yes
  - b. No





38. If yes, how much would you estimate you've spent in repair costs over the past year?
39. If you have made your own repairs, did you attempt to deduct this cost from your rent?
- a. Yes
  - b. No
40. If you have made repairs and deducted from rent, did your landlord approve the deduction?
- a. Yes
  - b. No
41. If your landlord did NOT approve the rent deduction for repairs, did they threaten or give a notice to evict you because you deducted for repairs?
- a. Yes
  - b. No
42. Do you currently have, or have you ever had, any of these problems with conditions in your home?
- Rate each on a scale from 0 to 4:** 0 = never 1 = rarely 2 = occasionally 3 = frequently 4 = always
- a. Roaches/insects: 0 1 2 3 4
  - b. Rodents or termites: 0 1 2 3 4
  - c. Plumbing: 0 1 2 3 4
  - d. Mold: 0 1 2 3 4
  - e. Air conditioning broken: 0 1 2 3 4
  - f. Heating broken or no heat: 0 1 2 3 4
  - g. Major appliance broken: 0 1 2 3 4
  - h. Roof leaks: 0 1 2 3 4
  - i. Paint has tested positive for lead: Yes/No
  - j. Lack of sufficient lighting: 0 1 2 3 4
  - k. Lack of insulation: 0 1 2 3 4
  - l. Electrical problems: 0 1 2 3 4
  - m. Flooring damage: 0 1 2 3 4
  - n. Carpeting damage: 0 1 2 3 4
  - o. Window damage: 0 1 2 3 4
  - p. Other repairs: 0 1 2 3 4
43. If you have any issues, have you called your city code/building inspection department to make a complaint on any of these issues?
- a. Yes
  - b. No
44. If you made a complaint to your city about conditions, did a city representative come to your home to inspect?
- a. Yes
  - b. No



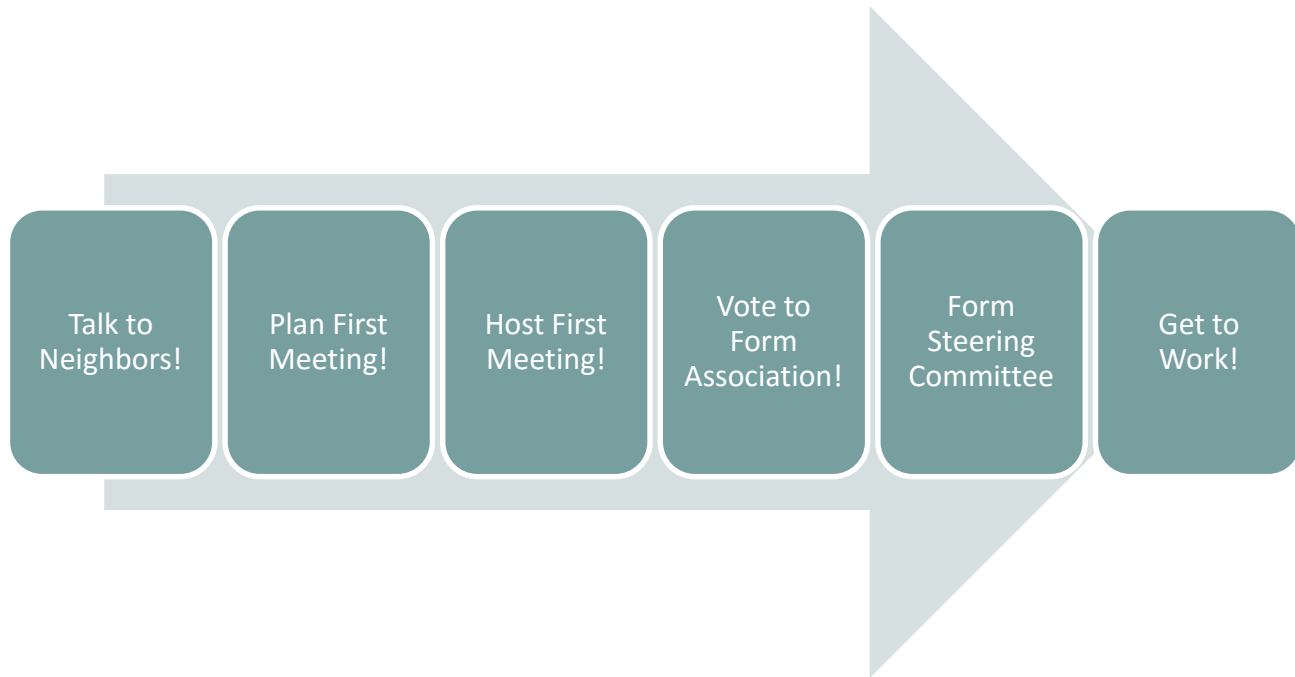
45. If they came out to inspect, did the city issue a written citation to the landlord to make the repair?
- a. Yes
  - b. No
46. Would you be willing to provide a copy of your lease so we can compare this with the industry standard?
47. What is your age?
- a. 14 - 18
  - b. 19 - 24
  - c. 25 - 35
  - d. 36 - 45
  - e. 46 - 65
  - f. Over 65
48. How many people live in your household?
49. How many minors (under 18)?
50. Does anyone with a disability live in the home?
- a. Yes
  - b. No
51. Annual Household Income Level:
- a. \$20K or less
  - b. \$21K-\$40K
  - c. \$41K-50K
  - d. \$51K-\$70K
  - e. Over \$70K
  - f. Other
52. Race or ethnicity:
- a. American Indian or Alaskan Native
  - b. Asian
  - c. African American
  - d. Pacific Islander
  - e. Latin/Hispanic
  - f. Filipino
  - g. Caucasian/White
  - h. Multi-Racial
  - i. Other



## How-To Form a Tenants' Association

This guide is intended to provide a starting point for **California** tenants who wish to organize to improve conditions in their apartment building or complex. There is more information on our website at [www.TenantsTogether.org](http://www.TenantsTogether.org).

Why form a Tenant Association? The answer is simple: there is power in numbers. Join with your neighbors to make demands of your landlord. Do not be afraid. California law protects you from retaliation for organizing and asserting your rights.



### Step 1: Talk to your neighbors!

Talk to the people who live in your building. Identify common problems and frustrations. Let interested neighbors know that as a group tenants can be more effective addressing these issues and improving conditions.

These preliminary discussions with your neighbors will help you determine whether or not the tenants feel strongly enough about the problems to want to mobilize. If tenants seem to be afraid to get involved, inform them that retaliation is illegal under CA law.

### Step 2: Plan your first meeting!

Download and customize TT's Initial Meeting Flyer which includes the purpose, date, time and location of the meeting. Choose the time/location that will be convenient for tenants.

Give the flyer to tenants who you know are interested. Go door to door with the flyer. Post in common areas where allowed. You have a right to organize your building, but there may be some limits on how you can do it based on your lease and house rules. Call Tenants Together at 1.888.495.8020 if you have questions or are encountering problems.

### Step 3 & 4: Host your first meeting and vote whether to form an association!

One or two of the most actively interested tenants should chair the first meeting. Remember:

- *Decide who will take minutes.* Take minutes of the meeting. Include topics discussed and decisions made. You do not need to record everything everyone says.
- *Make sure everyone signs in.* Use TT's form sign-in sheet.

*Agenda.* Use TT's sample agenda attached: (1) Welcome, (2) Ground rules, (3) Introductions, (4) Common Building Problems & Management Response, (5) Whether to form TA, (6) Schedule the next meeting.

*Ground rules:* There are several basic ground rules for a tenant meeting. First, everyone must sign in. Second, landlords and their representatives are not permitted at tenant meetings. Third, tenants agree not to share information obtained at the meeting with management. Fourth, everyone must be respectful of others, even if opinions differ.

*Introductions.* Ask everyone at the meeting to introduce him/herself. Include name, unit number & how long tenant has lived there.

*Common building problems.* Identify BUILDING-WIDE problems (general maintenance, late fees, garbage collection, etc. Direct tenants with individual problems to call TT tenant rights hotline. Identify one or more priority building-wide problems and which problem(s) should be dealt with first. This may be adjusted at future meetings. Discuss how tenants have dealt with complaints in the past and how management has responded. Has anyone made written complaints and do they have copies?

*Vote whether to form TA.* Is it the general consensus of the tenants that working together as a group will be more effective than working individually? Take a vote on whether to form a tenants' association. If so, you are ready to begin working together as a group.

*Schedule Next Meeting:* Meetings should be periodic. Often monthly meetings are best.

Congratulations! You have formed a Tenant Association!

### Step 5: Form your steering committee!

Don't worry about structure in your first meeting. There is no "perfect" or "best" way to structure a tenants' association. Basically, it should be structured in a way that will best enable the group to set policies and make decisions, that will involve as many of the tenants as possible in implementing the strategies the group decides to undertake, and that will enhance the group's ability to carry out the day-to-day tasks needed to improve the building's conditions.

Some organizations begin by forming a steering committee made up of a small group of active people. Those serving on a steering committee act as the collective leadership of the group. They should fully understand that they represent and are accountable to the full membership. Many tenants' associations function very well with a **steering committee** and never adopt a more formal structure.

### *What's a Steering Committee and how does it work?*

*Purpose:* The steering committee helps to guide the association in setting policies, defining goals and in making decisions. The steering committee coordinates and delegates the day-to-day tasks needed to run the association, such as scheduling, setting agendas for and chairing meetings, maintaining records, drafting letters, etc.

*Committee Members:* The steering committee should consist of tenants who have good judgment and are most able to carry out the day-to-day tasks of running the tenants' association. The size of the steering committee will depend on the size of the building or complex and the goals that the association wants to accomplish.

*Authority:* Be clear on who is authorized to speak for the group. Landlords will typically find some tenants whom they can win over, and then act as if those tenants speak for all tenants. Reach an agreement within the tenant association on who is authorized to speak for the group and what they must do (member vote, steering committee consensus, etc.) before committing the association to a position.

*Record keeping:* The association will need to keep accurate and complete files of all activities initiated by the group, including minutes of meetings, copies of newsletters, copies of all correspondence, copies of complaints, etc.

*Delegating responsibilities:* Remember that your organization will be doomed if everyone leaves each meeting thinking that someone else is going to do the work.

*Encourage member participation:* A member has the right and the responsibility to question and, if necessary, challenge what the leadership is saying and doing, especially if it is contrary to the strategies or goals decided upon by the group, or if the members are not a part of deciding what the group will do.

Depending on the size of your group, the complexity of the problems, and other factors, your group may decide to formalize the association's structure by electing officers and writing by-laws. This is not required to form a tenant association, but may help resolve disputes and clarify how the association operates.

### **Step 6: Get to work!**

All tenants should have a role in building and strengthening the association. Make sure tenants know at the end of each meeting what they are expected to do. Tasks can include keeping a log of problems, delivering know your rights materials to neighbors, etc. Progress should be shared and discussed at future meetings. There are also key tasks that need to get done on an ongoing basis. You will need volunteers, and probably committees, to get these done. Here are several examples:

*Research:* Information will need to be gathered on the housing laws, regulations, tenants' rights and responsibilities specifically related to your building's problems. Research is also needed regarding city



inspections, prior lawsuits, and other publically available documents. Also, many associations find it helpful to find out what other groups with similar problems have done to resolve them.

*Outreach and Communications:* If the association keeps everyone informed, through every step, tenants will increase their participation. Develop a system (newsletter, mail, posted notice, phone tree, etc) that will let all tenants know what is happening and why, and when meetings will occur. The methods you choose will depend on building size and resources. Tenants will also need to know whom to contact within the association as issues arise.

*Managing Finances:* The association may incur group expenses such as postage, duplicating, etc. The association will have to decide how to pay for such expenses, either by dues, contributions, fund-raisers, etc. If the association decides to collect dues, keep in mind that not all tenants have the same financial capabilities. You do not have to decide on dues at your first meeting and, in fact, many associations simply ask for contributions as expenses come up. Give expense reports at meetings, and keep records/receipts. Open an association bank account if needed.

With a democratic structure (even if not formal), hard work, consistency, and open communications, you are ready to empower tenants to improve your building/complex. Remember, there is no single, right way for the tenant association to make an impact. What is clear is that the broader and more active the membership, the better.

*Choosing issues.* Your association may decide to focus on a single issue or take on a range of issues. Keep it manageable. Don't try to do everything at once. Sometimes it helps to start with a single issue, establish you can win, and then expand to other issues. Other times, the issues are interrelated and must be addressed together. Focus on building wide issues.

*Strategy & Tactics:* Tactics may include meetings with management, protests, letter writing campaigns, complaints to government agencies, rent strikes, litigation, or any number of approaches. It is important to understand potential consequences (positive and negative) of each approach before committing to a particular course. Be firm with your landlord and escalate your demands and tactics as needed.

*We invite representatives of your tenant association to contact Tenants Together or attend one of our community meetings to strategize about how your association can achieve its goals. In some cases, the issues you are facing may be broader than just your building/complex, and by connecting with other tenants in your community and other tenant associations, you can help bring about broad based change for tenants.*

Your group or organization title

**Volunteer Position Description: Volunteer title**

Contact:

<b>Component</b>	<b>Definition</b>
Position Title	What sums up in a few words what the volunteer will do?
Purpose	What is the core “mission” of the volunteer? What goal are they working towards?
Key Responsibilities	What are the key tasks the volunteer will be doing to reach their purpose? Every day, weekly, monthly? Do they need to give reports or summaries to a project lead?
Location	Where will the volunteer go on a regular basis to check in? Is there an office or regular meeting space?
Supervision	Who is the volunteer’s point person on a day-to-day basis? Who is leading the project they are working on?
Length of Appointment	What kind of turnover can the project accommodate? For instance, would it be too difficult if you had to train new volunteers once a month, so you would like volunteers to stay at least a few months?
Time Commitment	How much time would a volunteer need to spend on the project each week in order to make it successful? Is it a fast-moving project? Is it relationship-based? Is there a deadline to be met?
Qualifications	What skills would a volunteer need to already have in order to be successful? What skills are you willing to train the right person on?
Benefits	What kind of experience might the volunteer get from working on the project? What kind of connections in the community or professional world might they be able to make? Does the issue speak to the volunteer directly and working on it will bring them tangible benefits?
Support Provided	What resources are available to the volunteer? Is there a group working on the project? Is there a broader community the volunteer can go to to get support?