

Community Partners of South Florida (CPSFL)

Building Trust, Expanding Reach, and Protecting Homeownership in Palm Beach County

Since the beginning, we created data, but our data was created based on fishing. We attended events and workshops across Palm Beach County. Now we have Project Guardian, which gives us a target. " — **Carlos Hernandez, Community Partners of South Florida**

About the Florida Heirs' Property Learning Exchange

The Florida Heirs' Property Learning Exchange (FHPLE) was created to support four NeighborWorks Organizations who are members of the NeighborWorks Florida Collaborative to address heirs' property challenges that threaten homeownership, housing stability, and generational wealth across Florida. Through peer learning, technical assistance, data tools, coaching, and strategic partnerships, participating organizations worked together to develop local solutions that help families preserve ownership through estate planning and resolve heirs' property issues.

The initiative brought together organizations from Palm Beach, Pinellas, Hillsborough, Alachua, and Duval counties and was supported through partnerships with NeighborWorks Florida Collaborative, LISC Jacksonville, the Florida Housing Coalition, and other subject matter experts. Participating organizations gained access to training, implementation resources, Project Guardian™ data tools, and opportunities to learn from one another while testing approaches tailored to their communities.

The Community Challenge

Palm Beach County is often viewed as a community of wealth and opportunity, yet many longtime homeowners face challenges related to heirs' property, estate planning, and unclear property ownership. Families frequently inherit homes without formal title transfers or legal documentation, placing generational assets at risk and creating barriers to housing stability and wealth preservation.

At the outset of the Florida Heirs' Property Learning Exchange (FHPLE), Community Partners of South Florida (CPSFL) set an ambitious goal: increase community awareness of heirs' property issues, expand access to legal and financial resources, strengthen partnerships, and help more homeowners preserve family assets. The organization recognized that achieving these goals would require both community trust and stronger

systems for identifying and supporting households before property challenges became crises.

What Was Most Valuable About the FHPL Experience

CPSFL entered the learning exchange with a strong foundation in community engagement, housing counseling, and legal partnerships. During the six-month initiative, the organization participated in 19 community events across Palm Beach County, including the Glades Housing Summit, Back-to-School events, university programs, and neighborhood outreach activities. These efforts reached 644 residents, demonstrating significant interest in heirs' property education and home protection services.

The learning exchange helped CPSFL strengthen this outreach model through peer learning, technical assistance, workflow improvements, and access to Project Guardian™, a mission-aligned data platform designed to support heirs' property prevention efforts. Through an MOU with the NeighborWorks Florida Collaborative, CPSFL gained access to tools that will allow staff to identify vulnerable areas and focus outreach efforts more strategically.

The organization also integrated heirs' property education into existing housing counseling and community engagement activities. Attorneys regularly participate in homeownership education workshops, helping residents better understand wills, estate planning, Lady Bird deeds, and other tools that can protect family homes. Staff refined intake and referral processes through Salesforce and strengthened collaboration with Palm Beach County Legal Aid, creating a more coordinated pathway from outreach to legal assistance.

Progress and Early Results

Over the course of the initiative, CPSFL demonstrated substantial growth in both reach and engagement. Of the 644 residents reached through community events, 58% attended one of the organization's 13 heirs' property workshops and completed documentation needed to begin the legal assistance process.

The organization expanded its partnership network beyond its longstanding relationship with Faith Deliverance Church, adding new faith-based partners including a Baptist church in Delray Beach and exploring opportunities to engage senior centers, libraries, healthcare organizations, real estate professionals, and educational institutions.

Community connectors also played an increasingly important role in outreach and resident engagement. As their experience grew, they generated new ideas for connecting with homeowners, increasing the organization's capacity to educate residents and build trust within communities. Staff developed stronger systems for documenting outreach activities, referrals, and follow-up efforts, creating a more comprehensive picture of how residents move through the heirs' property support process.

A Continuing Challenge

Trust remains equally important. Because many residents have encountered scams or misinformation, establishing credibility often requires sustained relationship-building through trusted institutions such as churches and community organizations. Maintaining engagement, protecting confidentiality, ensuring follow-up, and securing continued legal assistance capacity remain ongoing priorities.

As the program grows, long-term sustainability will also be critical. Expanding outreach, maintaining trusted community partnerships, and connecting homeowners to legal services requires ongoing investment and coordination. Continued funding and resource development will be essential to ensuring that the progress made through FHPLE can be sustained and expanded to reach more families in need.

What's Next

Over the next 18 months, CPSFL plans to build on the momentum generated through FHPLE by expanding outreach, strengthening partnerships, and fully incorporating Project Guardian data into its operations. The organization intends to increase social media marketing, deepen relationships with churches and community institutions, and continue strengthening collaboration with legal aid providers.

A major focus will be transitioning from broad outreach efforts to targeted engagement in vulnerable neighborhoods. Using Project Guardian data, CPSFL plans to identify communities with a higher likelihood of heirs' property challenges and connect residents to services before ownership issues threaten housing stability. The organization also intends to keep partnership agreements current, strengthen referral pathways, and continue refining its intake and follow-up systems.

For CPSFL, heirs' property preservation is ultimately about more than legal assistance. It is about helping families protect generational wealth, maintain housing stability, and preserve opportunities for future generations. Through stronger partnerships, trusted community relationships, and emerging data-driven strategies, the organization is building a sustainable model for homeowner preservation in Palm Beach County.

About the Florida Heirs' Property Learning Exchange

The Florida Heirs' Property Learning Exchange brought together community development organizations and technical assistance providers to address heirs' property challenges and preserve generational wealth across Florida communities.

Collaborative Partners:

NeighborWorks Florida Collaborative • LISC Jacksonville • Florida Housing Coalition

For more information, contact:

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