Welcome Back!

MORNING:
• HomeFirst Background and Notice of Funding
• Key Elements of Quality PSH
• Supportive Housing Models

AFTERNOON:
• PSH Roles & Responsibilities
• Coordinating Property Management and Services
• Service Plan & Budgeting
HomeFirst Atlanta Developing and Operating Quality Supportive Housing

Afternoon Session
December 7, 2018
Presented by: Robyn Andrews, Jane Bilger, Regina Cannon
Developing Quality Supportive Housing
Roles & Responsibilities
Roles & Responsibilities

PROJECT SPONSOR - Lead/Project Vision/Community and Political Support

OWNER – Owning/Oversight/Asset Management

DEVELOPER – Oversees financing and construction-

SERVICE PROVIDER – Coordinates and provides support services

PROPERTY MANAGER - Day-to-day operations and maintenance

HOUSING MANAGER – Tenant selection/relations
Roles... and the People Responsible

- Need to know your role
- What are you bringing to the table
- Be clear on strengths
Owner and/or Sponsor: Roles & Responsibilities

- Legally responsible for project
- Select partners/collaborators, including developer, property manager and service providers, and monitor performance
- Manage relationships with stakeholders and community
- Oversee implementation of management and service plans
- Monitor project finances and manage long-term facility planning
Developer: Roles & Responsibilities

• Oversee development, from concept to predevelopment to construction
• Work with rest of team to secure financing
• Coordinate with other team members throughout the design and development process
• Ensure that the project will be viable in the long term
• If staying as owner/sponsor, manage the asset and oversee the property
Property Manager: Roles and Responsibilities

- Participate in developing the operating budget and project design
- Manage the rent-up process, including marketing, outreach, interviews, and tenant selection
- Oversee rent collection, fiscal management and regulatory compliance
- Provide orientation and ongoing communications for residents
- Routine maintenance, and health and safety issues
- Enforce leasing agreement and help address issues jeopardizing housing retention
- Build relationship with service providers and community
Service Provider(s): Roles and Responsibilities

- Engage residents in services to support housing stability and life goals. Maintain records of services provided.
- Design and implement the supportive services plan and budget.
- Help raise ongoing funds for implementation.
- Identify other service providers and establish coordination strategy.
- Develop relationship with property management team; participate in tenant screening and rent-up process.
- Help develop and implement emergency policies and procedures
- Input into revising House Rules
- Participate in community-organizing/building activities
- Assist in crisis management and addressing disruptive residents
1. What is their self-interest? Ours?
2. What outcome do we want from the collaboration?
3. What resources can our organization bring?
4. What do they provide that we cannot?
5. Who will represent them – us?
6. Have we collaborated before? How did it go?

What are some keys to success in collaboration?
KEYS TO SUCCESS?

✔ Similar mission and goals
✔ Everyone contributes to the partnership
✔ Defined roles and responsibilities
✔ Clear and constant communication
✔ Earn trust over time
✔ In it for the long-haul
✔ Sharing and collaboration
✔ Mutual respect
MOUs: Partnership

• Outline roles and responsibilities of partners
  • Do not replace/substitute contracts
• Iterative process
• Include:
  • Guiding principles
  • Responsibilities
  • Scope of Services for partners
  • Funding
  • Terms
Partner Role Group Activity: Goal: To understand the tasks in the creation of a project and who is responsible for each task. Instructions: Arrange sticker under the lead partner. Straddle lines for shared responsibilities.

- **PROJECT SPONSOR** - Lead/Project Vision/Community and Political Support
- **OWNER** – Owning/Oversight/Asset Management
- **DEVELOPER** – Oversees financing and construction
- **SERVICE PROVIDER** – Coordinates and provides support services
- **PROPERTY MANAGER** - Day-to-day operations and maintenance
- **HOUSING MANAGER** – Tenant selection/relations
Coordinating Property Management and Services
Separation of Housing and Services

Property/Housing Management
Show me the money!

Common Goal: Keeping Tenants Housed

Supportive Services
I just want to help!
Key Questions for Service Providers

- What is your service philosophy and model for serving the target population?
- What is your area of expertise in serving the target population?
- Who will make up the service team, and how will they be deployed?
- What necessary services for this population do you not provide?
- How will the confidentiality of client information be handled?
- What training will you provide for staff?
Key Questions For Property Manager

- What is your philosophy of property management?
- What is your experience in managing projects that are similar to the proposed project?
- What is your experience in working with a social service provider in a supportive housing environment?
- How will the confidentiality of client information be handled?
- What training will you provide for staff?
Coordination

Property Management

Housing Management

Service Provider
Test Your Knowledge! True or False?

1. If multiple options are available, a tenant has the choice of unit, model, and/or location.   
   - T

2. Participation in services is required.   
   - F

3. Tenants must take any and all prescribed medication.   
   - F

4. Subsidized housing is exempt from fair housing rules.   
   - F

5. Staff explain the lease, tenant’s rights and responsibilities, and the lease violation process.   
   - T

6. Applicants with bad credit are screened out.   
   - F

7. Individuals who have a negative housing history are screened out.   
   - F

8. Affirmative marketing plan is prepared by the owner/property manager.   
   - T

9. Housing Authorities have discretion for other issues related to criminal histories or drug-involvement.   
   - T
Property/Housing Management

Configurations of Property Management

- Project Sponsor Provides Property Management
- Project Sponsor Contracts for Outside Property Management
- Project Sponsor Leases Units From Owner Who Provides Property Management
- Tenants Lease from Owner Who Provides Property Management

Housing Management
Key Areas of Coordination

- Educating and supporting tenants
- Soliciting and using tenant input
- Keeping tenants stably housed
- Ensuring the ongoing quality of the physical unit
- Tracking outcomes and improving quality
Building Blocks for Coordination

- Written Agreements
- Conflict Resolution Plans
- Frequent, Ongoing Communication
- Cross-Training
# Cross-Cultural Comparisons

<table>
<thead>
<tr>
<th></th>
<th>Housing Developers</th>
<th>Social Service Agencies</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>External relationships</strong></td>
<td>Housing developers sign multiple major contracts with vendors and development team members each year. Staff often signs contracts without separate board action.</td>
<td>Varies, but outside contracts are less common in the everyday work of a service agency, and even fairly small contracts may require board review. Collaborative relationships are often informally arranged without legal contracts.</td>
</tr>
<tr>
<td><strong>Approach to time, decision making and process</strong></td>
<td>Developers talk about units and projects. Their work has a beginning, middle and an end. Their survival and success depends in part upon timely completion of projects because fees come at completion. They are deadline driven. They are often impatient with extended processes.</td>
<td>Service providers talk about programs and the number of people served. Their work is often without a clear middle or end. “Process” is a major professional tool. Successful outcomes are difficult to quantify.</td>
</tr>
<tr>
<td><strong>Staff Responsibilities</strong></td>
<td>A single staff person is typically the project manager for the period between conception and initial occupancy of a project, usually at least 12 to 24 months.</td>
<td>Multiple staff members are more commonly involved in delivering services to a project.</td>
</tr>
<tr>
<td><strong>Consumer Relations</strong></td>
<td>Consumers are tenants and are protected by landlord-tenant laws.</td>
<td>Consumers are clients and are protected by professional confidentiality and ethics policies.</td>
</tr>
</tbody>
</table>
Questions?
Break Time!
Developing Your Agency Services Plan
Why are Services Important?

Affordable Housing + Supportive Services = Platform

Health, Recovery and Personal Growth
Quality Supportive Services are:

- Tenant-Centered
- Sustainable
- Accessible
- Integrated
- Coordinated
Tenant-Centered Service Delivery

Services are delivered in a culturally competent manner.

Staff actively work to engage tenants in voluntary services that support the Housing First model.

Services “start where tenants are at” and can vary in intensity based on tenant needs.

Tenants are involved in services implementation, evaluation and policy development.
Question: Why Do We Need a Service Plan?
Every supportive housing project needs a comprehensive written services plan that describes:

Available services
Who provides the services
Goals and anticipated outcomes
Where and when they can be accessed
Why Do We Need a Service Plan?

For funders, provides assurance that services:

- Meet needs of tenants/community
- Can be expected to meet standards/requirements
- Have necessary components for success (e.g. staffing, partnerships)
- Can be reasonably expected to deliver effective services
Why Do We Need a Service Plan?

For the organization:

- Orients new staff and new partners to the organization’s work
- Helps current staff stay focused on work linked to mission
- Provides framework for outcomes measurement / Quality Assurance efforts
- Assists in identifying highest priorities for: staff development, fundraising, partnerships, services, etc.
Why Do We Need a Service Plan?

For tenants:

• Tenants need to know what services are available to them
• Forms the basis for their individual service plans
Designing a Support Services Plan

When do supportive services start?
What Else are Services About?

- Community Integration
- Connection
- Building a social network
- Creating opportunities for fun
- Preventing crises
What do we know about our tenants and their needs?

What do tenants say that they need?

Refining the Support Services Plan and Available Services
What do we know about our tenants and their needs?

- Are they youth, Veterans, families, seniors, or chronically homeless households?
- Do individuals have substance use disorders or multiple health challenges?
- Are there cultural or language considerations?
- Were they homeless on the street or in shelter before moving in?
- What do prospective tenants say they need?
Stakeholder Input in Support Service Planning

- Prospective tenants
- Other service providers
- Property or housing management staff
- Property owners
- Neighbors
Developing an Actionable Service Plan

What needs to be in place for a service plan to be actionable?

- Clear roles and responsibilities of service provider.
- MOUs for service delivery.
- Sustainable and flexible funding to support needed services by the tenants.
- Policies and procedures on service coverage that aligns with the needs of tenants.
Service Planning: Agency Capacity Considerations

What types of supportive services do you already provide?

Do you have staff available to manage additional programs and services?

Are other service providers in your community appropriate partners for this project?

What additional experience or training does your staff possess?
The Reality Check…

Service plan impact on other budgets?

- **Build into Capital Budget**
  - Office space or recreational space
  - Outdoor gathering spot
  - Computer center with networks
- **Separate from Operating Budget**

Is the Service Plan feasible?

- What are the priorities/essential elements in the service plan?
- What might be possible through partnerships or unrestricted dollars?
- How does lease up impact the budget?
Service Budgets
Services Budget

Covers the costs of supportive services for tenants (e.g. case management, mental health, treatment & recovery services), which may be provided on-site or off-site.
Services Budget Basics

- The Service Plan will inform the Budget
- Service Budget separate from operating budget
- Projected expenses = projected revenues
- Implementation timeline/ramp up
### Activity - Budgeting

<table>
<thead>
<tr>
<th>What are the Services needed by your residents?</th>
<th>Which can be delivered through partnerships?</th>
</tr>
</thead>
</table>

© All rights reserved. No utilization or reproduction of this material is allowed without the written permission of CSH.
Services Budget Basics

Services plan reflects goals of housing and includes your budget assumptions:

- What % of tenants will access services over time?
- What type of services will clients want?
- What services will clients use?
- Will needs change over time?
- Who will provide the services?
- What’s our tenant to staff ratio?
- Is it reasonable in terms of service provision?
- In terms of cost?
- What services will be on-site vs. in the community?
- What client service costs do we include – transportation?
Services Budget Components

Personnel – Majority of Budget

- Direct staff including program directors, case managers, nurses, and supervisory staff
- Employee benefits and salaries should be included in budget

Other services-related expenses

- Consultant/contractual services
- Social/client services
- Transportation
- Staff training
- Supplies & materials for services
- General office supplies and support
Project Basics

This budget planning tool is intended to provide organizations with a framework for understanding and planning for service costs in supportive housing. There are 4 drivers that will impact program budget planning:

1. Staffing Patterns
2. Staffing Cost
3. Rate Structure
4. Productivity

Basic Inputs

<table>
<thead>
<tr>
<th>Are tenants new to supportive housing?</th>
<th>Yes</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is your current rate/reimbursement structure?</td>
<td>Per Diem</td>
</tr>
</tbody>
</table>

Show the Following Service Models in Summary Table?

<table>
<thead>
<tr>
<th>Assertive Community Treatment</th>
<th>Critical Time Intervention</th>
<th>Intensive Case Management</th>
<th>Medicaid Waiver Tenancy Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Summary Table Based on Inputs

| | Assertive Community Treatment | Critical Time Intervention | Intensive Case Management | Medicaid Waiver Tenancy Support |
|-------------------------------|---------------------------|--------------------------|-------------------------------|
| Number of FTE Employees       | 14                        | 8                        | 15                           | 10                            |
| Annual Program Budget         | $1,433,601                | $603,110                 | $1,125,757                   | $653,149                      |
| Total Number of Tenants       | 100                       | 100                      | 100                          | 40                            |
| Total Units of Service, based on a standard 15 minute unit of service | 47,239 | 27,349 | 54,698 | 27,846 |
| Cost Per Unit                 | $30.35                    | $22.05                   | $20.38                       | $23.46                        |
| Per Tenant Per Day Rate       | $39.28                    | $16.52                   | $30.84                       | $44.74                        |
| Per Tenant Per Month Rate     | $1,194.67                 | $302.59                  | $938.13                      | $1,360.73                     |
| Per Tenant Per Year Rate      | $14,336.01                | $6,031.10                | $11,237.57                   | $16,328.73                    |

See Assumptions tab for further detail

CSH recommends the additional considerations when using this tool:

1. Organizations should be reviewing salary scales every 3-5 years in your local area to ensure budgeted salaries are meeting or exceeding the local labor market standards.
2. As organizations explore a variety of reimbursement strategies, one rate structure alone is unlikely to be sufficient for meeting all program costs due to funding restrictions and other limitations.
3. This tool includes recommended caseload sizes as indicated by evidence-based practice. You may add populations or adjust caseload sizes as needed for your organization’s program or specific model.
Sample Service Budget

<table>
<thead>
<tr>
<th>Expenditure Category: Sample (One Year)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Personnel</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Employee Salaries</th>
<th>FTE</th>
<th>Salary</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Supervisor</td>
<td>1.00</td>
<td>$40,000</td>
<td>$40,000</td>
</tr>
<tr>
<td>Case Manager/ Substance Abuse Counselor</td>
<td>1.00</td>
<td>$30,000</td>
<td>$30,000</td>
</tr>
<tr>
<td>Case Manager/ Mental Health Counselor</td>
<td>2.00</td>
<td>$30,000</td>
<td>$60,000</td>
</tr>
<tr>
<td>Vocational Rehab Counselor</td>
<td>1.00</td>
<td>$30,000</td>
<td>$30,000</td>
</tr>
<tr>
<td>Nurse/Parent Educator</td>
<td>0.50</td>
<td>$42,000</td>
<td>$21,000</td>
</tr>
<tr>
<td>Van Driver</td>
<td>1.20</td>
<td>$13,500</td>
<td>$16,200</td>
</tr>
<tr>
<td><strong>Total Employee Salaries</strong></td>
<td>6.70</td>
<td></td>
<td>$197,200</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Employee Benefits</th>
<th>Rate</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Security</td>
<td>7.65%</td>
<td>$15,086</td>
</tr>
<tr>
<td>Insurance, Life and Health</td>
<td>14.35%</td>
<td>$28,298</td>
</tr>
<tr>
<td>Pension and Retirement</td>
<td>3.50%</td>
<td>$6,902</td>
</tr>
<tr>
<td>Worker's Comp/UIID/Disability</td>
<td>2.00%</td>
<td>$3,944</td>
</tr>
<tr>
<td><strong>Total Employee Benefits</strong></td>
<td>27.50%</td>
<td>$54,230</td>
</tr>
<tr>
<td><strong>Total Personnel</strong></td>
<td></td>
<td>$251,430</td>
</tr>
<tr>
<td>(Salaries and Benefits)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

© All rights reserved. No utilization or reproduction of this material is allowed without the written permission of CSH.
## Sample Service Budget

### Expenditure Category: Sample (One Year)

#### Other Than Personnel Services (OTPS)

<table>
<thead>
<tr>
<th>Service Description</th>
<th>Rate</th>
<th>Hours</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consultant/Contractual Services (per hour)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nutritionist ($60 per hour * 150 hours)</td>
<td>$60</td>
<td>150</td>
<td>$9,000</td>
</tr>
<tr>
<td><strong>Total Consultant/Contractual Services</strong></td>
<td></td>
<td></td>
<td><strong>$9,000</strong></td>
</tr>
<tr>
<td>Organizational and Program Expenses (per month)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Telephone Lease</td>
<td>$500</td>
<td>12</td>
<td>$6,000</td>
</tr>
<tr>
<td>Telephone Usage</td>
<td>$1,000</td>
<td>12</td>
<td>$12,000</td>
</tr>
<tr>
<td>Utilities</td>
<td>$150</td>
<td>12</td>
<td>$1,800</td>
</tr>
<tr>
<td>Postage/month</td>
<td>$100</td>
<td>12</td>
<td>$1,200</td>
</tr>
<tr>
<td>Office Supplies/month</td>
<td>$200</td>
<td>12</td>
<td>$2,400</td>
</tr>
<tr>
<td>Office Equip - Maintenance and Rental</td>
<td>$500</td>
<td>12</td>
<td>$6,000</td>
</tr>
<tr>
<td><strong>Total Organizational and Program Expenses</strong></td>
<td></td>
<td></td>
<td><strong>$29,400</strong></td>
</tr>
<tr>
<td>Social/Client Services</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Program/Rec. Activities Supplies/month</td>
<td>$400</td>
<td>12</td>
<td>$4,800</td>
</tr>
<tr>
<td>Recruitment/month</td>
<td>$200</td>
<td>12</td>
<td>$2,400</td>
</tr>
<tr>
<td><strong>Total Social/Client Services</strong></td>
<td></td>
<td></td>
<td><strong>$7,200</strong></td>
</tr>
<tr>
<td>Transportation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Van Leasing</td>
<td>$350</td>
<td>12</td>
<td>$4,200</td>
</tr>
<tr>
<td>Maintenance, Fuel, Insurance</td>
<td>$275</td>
<td>12</td>
<td>$3,300</td>
</tr>
<tr>
<td>Parking</td>
<td>$85</td>
<td>12</td>
<td>$1,020</td>
</tr>
<tr>
<td><strong>Total Transportation</strong></td>
<td></td>
<td></td>
<td><strong>$8,520</strong></td>
</tr>
<tr>
<td><strong>Total OTPS</strong></td>
<td></td>
<td></td>
<td><strong>$54,120</strong></td>
</tr>
<tr>
<td><strong>Total Supportive Services</strong></td>
<td></td>
<td></td>
<td><strong>$305,550</strong></td>
</tr>
</tbody>
</table>
Service Cost Considerations

Service cost vs. an operations cost?

- Only include costs related to the provision of supportive services in service budget
- Operating/property management should be in the operating budget (front desk staff, utilities, maintenance, etc.)

How is funding paid?

- Fee-for-service
- Fixed rate
- Grant or contract
Services Budget Components: Revenue

Grants and Contracts

Donations

In-kind Resources
Budgeting

Menu of Services Available to Tenants

- Which are potentially needed by your tenants?
- Which can be delivered through partnerships?
- Which might require new funds to provide?
  - For Personnel?
  - For Tenant Support
  - Is there overhead or indirect costs?

Today’s Special Employment Training!
Quality Supportive Housing Agency Self-Assessment Overview

Services
Dimensions of Quality Supportive Housing Self-Assessment Services
<table>
<thead>
<tr>
<th>Document Name (Organizational Documents)</th>
<th>Requirements</th>
<th>Select: Yes or No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mission Statement</td>
<td>Demonstrate commitment to affordability</td>
<td>No</td>
</tr>
<tr>
<td>List of Board Members</td>
<td>Our organization has at least one person with lived experience on our organization’s board.</td>
<td>No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Document Name (Site Documents)</th>
<th>Requirements</th>
<th>Select: Yes or No</th>
</tr>
</thead>
<tbody>
<tr>
<td>List of Neighborhood Amenities</td>
<td>Tenants can easily access a wide array of amenities on their own (grocery stores, community centers, health clinics, etc.).</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>In locations where this is not feasible, the project will have a plan to assist tenants in accessing needed resources. Applicants will leave blank if not applicable.</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>The development and/or ongoing operation of the supportive housing helps achieve goals outlined in relevant community plans, such as 10-year plans to end homelessness, consolidated plans and/or Olmstead implementation plans.</td>
<td>No</td>
</tr>
<tr>
<td>Community Planning Narrative</td>
<td>One or more of the supportive housing project partners plays a key role in the development and ongoing implementation of one or more relevant community plan(s).</td>
<td>No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Document Name (Project Planning Documents)</th>
<th>Requirements</th>
<th>Select: Yes or No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Vision</td>
<td>There are written goals and/or targeted tenant outcomes for the supportive housing project.</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>The project will have a reliable method for collecting and reviewing data on the</td>
<td>No</td>
</tr>
</tbody>
</table>

© All rights reserved. No utilization or reproduction of this material is allowed without the written permission of CSH.
Wrapping Up

- What thoughts do you have about what we’ve learned so far?
- Anything you will do differently as a result of what you learned today?
- Thank you for your time and patience!
Resources

CSH Supportive Housing Training Center
http://www.csh.org/training

Not a Solo Act
http://www.csh.org/resources/not-a-solo-act/

Integrating Property Management & Supportive Services:

CSH PHA Toolkit: An online technical assistance resource for Public Housing Authorities and their partners who want to end homelessness.
www.csh.org/phatoolkit
Thank You!

Jane Bilger
jane.bilger@csh.org

Regina Cannon
regina.cannon@csh.org

Robyn Andrews
robyn.andrews@csh.org