

# 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



AGENDA

# 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*



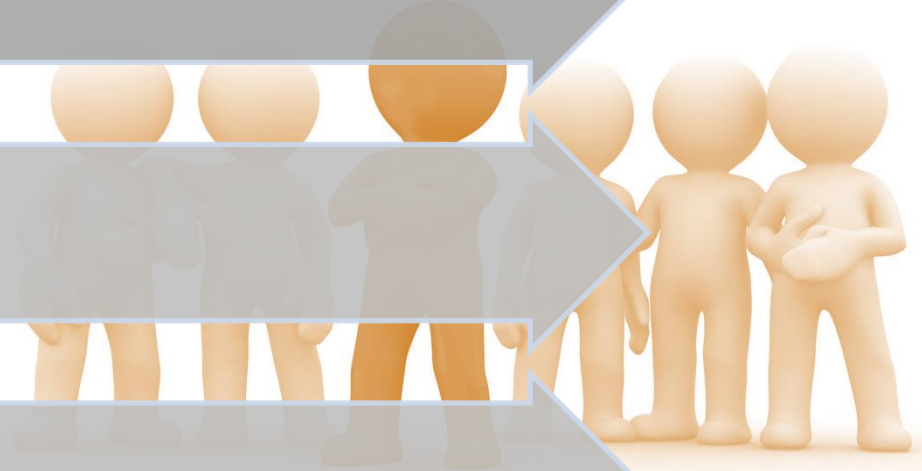
**HOUSING MANAGER** - *Tenant selection/relations*

# 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



## Questions to Ask/ Keys to Success

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



# 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?



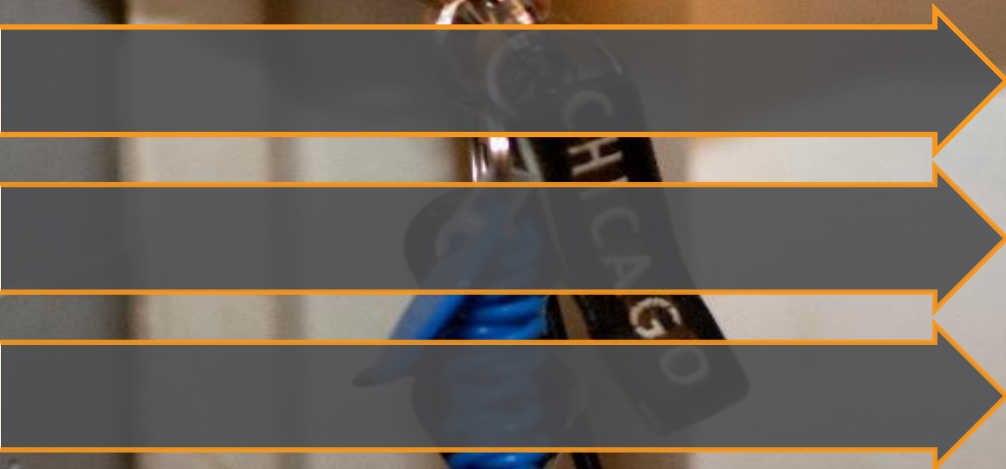
# Coordination



**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.
2. Participation in services is required.
3. Tenants must take any and all prescribed medication.
4. Subsidized housing is exempt from fair housing rules.
5. Staff explain the lease, tenant's rights and responsibilities, and the lease violation process.
6. Applicants with bad credit are screened out.
7. Individuals who have a negative housing history are screened out.
8. Affirmative marketing plan is prepared by the owner/property manager.
9. Housing Authorities have discretion for other issues related to criminal histories or drug-involvement.

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# 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**

**Frequent,  
Ongoing  
Communication**

**Conflict  
Resolution  
Plans**

**Cross-Training**

# Cross-Cultural Comparisons

|                                                      | Housing Developers                                                                                                                                                                                                                                                                  | Social Service Agencies                                                                                                                                                                                                              |
|------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>External relationships</b>                        | Housing developers sign multiple major contracts with vendors and development team members each year. Staff often signs contracts without separate board action.                                                                                                                    | 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. |
| <b>Approach to time, decision making and process</b> | 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. | 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.                     |
| <b>Staff Responsibilities</b>                        | 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.                                                                                                                      | Multiple staff members are more commonly involved in delivering services to a project.                                                                                                                                               |
| <b>Consumer Relations</b>                            | Consumers are tenants and are protected by landlord-tenant laws.                                                                                                                                                                                                                    | Consumers are clients and are protected by professional confidentiality and ethics policies.                                                                                                                                         |

# Questions?





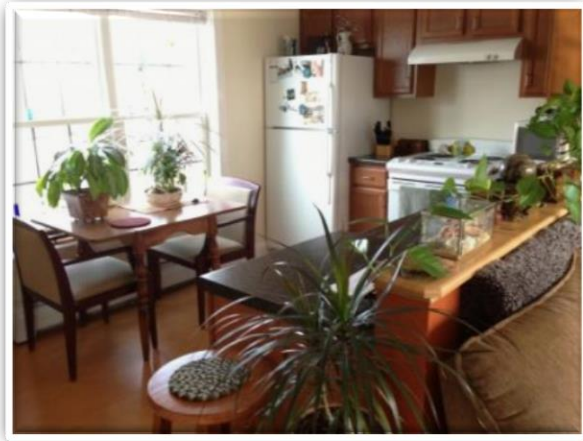
Break  
Time!



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# Developing Your Agency Services Plan

# Why are Services Important?



**Affordable Housing**



**Supportive Services**

**Platform**

**Health, Recovery and Personal Growth**

# Quality Supportive Services



# Tenant-Centered Service Delivery



Services are delivered in a culturally competent manner.

Tenants are involved in services implementation, evaluation and policy development.

**In Tenant-Centered Service Delivery**

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.

# Service Plan



Question:

Why Do We Need  
a Service Plan?

# Designing a Service Plan

## Writing it Down

**Every  
supportive  
housing project  
needs a  
comprehensive  
written  
services  
plan that  
describes:**



# 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.

## For tenants:

Why Do  
We Need  
a Service  
Plan?



- 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



# Refining the Support Services Plan and Available Services

What do we know about our tenants and their needs?

What do tenants say that they need?



# 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





## 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?

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

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

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

**What are the Services needed by your residents?**

**Which can be delivered through partnerships?**

# 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





# CSH Budget and Staffing Template - Excel



## 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

|                                                    |          |
|----------------------------------------------------|----------|
| Are tenants new to supportive housing?             | Yes      |
| What is your current rate/reimbursement structure? | Per Diem |

### Show the Following Service Models in Summary Table?

|                                 |     |
|---------------------------------|-----|
| Assertive Community Treatment   | Yes |
| Critical Time Intervention      | Yes |
| Intensive Case Management       | Yes |
| Medicaid Waiver Tenancy Support | Yes |

| 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                    | \$20.58                   | \$23.46                         |
| Per Tenant Per Day Rate                                               | \$39.28                       | \$16.52                    | \$30.84                   | \$44.74                         |
| Per Tenant Per Month Rate                                             | \$1,194.67                    | \$502.59                   | \$938.13                  | \$1,360.73                      |
| Per Tenant Per Year Rate                                              | \$14,336.01                   | \$6,031.10                 | \$11,257.57               | \$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.

|       |                       |     |     |     |                                 |            |             |          |   |
|-------|-----------------------|-----|-----|-----|---------------------------------|------------|-------------|----------|---|
| Cover | <b>Project Basics</b> | ACT | CTI | ICM | Medicaid Waiver Tenancy Support | References | Assumptions | Feedback | + |
|-------|-----------------------|-----|-----|-----|---------------------------------|------------|-------------|----------|---|



# Sample Service Budget

| Expenditure Category: Sample (One Year)            |             |               |                  |
|----------------------------------------------------|-------------|---------------|------------------|
| Personnel                                          |             |               |                  |
| Employee Salaries                                  | FTE         | Salary        | Total            |
| Program Supervisor                                 | 1.00        | \$40,000      | \$40,000         |
| Case Manager/<br>Substance Abuse Counselor         | 1.00        | \$30,000      | \$30,000         |
| Case Manager/<br>Mental Health Counselor           | 2.00        | \$30,000      | \$60,000         |
| Vocational Rehab Counselor                         | 1.00        | \$30,000      | \$30,000         |
| Nurse/Parent Educator                              | 0.50        | \$42,000      | \$21,000         |
| Van Driver                                         | 1.20        | \$13,500      | \$16,200         |
| <b>Total Employee Salaries</b>                     | <b>6.70</b> |               | <b>\$197,200</b> |
|                                                    |             |               |                  |
| Employee Benefits                                  |             | Rate          | Total            |
| Social Security                                    |             | 7.65%         | \$15,086         |
| Insurance, Life and Health                         |             | 14.35%        | \$28,298         |
| Pension and Retirement                             |             | 3.50%         | \$6,902          |
| Worker's Comp/UID/Disability                       |             | 2.00%         | \$3,944          |
| <b>Total Employee Benefits</b>                     |             | <b>27.50%</b> | <b>\$54,230</b>  |
| <b>Total Personnel<br/>(Salaries and Benefits)</b> |             |               | <b>\$251,430</b> |

# Sample Service Budget

| Expenditure Category: Sample (One Year)                |                    |               |                  |
|--------------------------------------------------------|--------------------|---------------|------------------|
| Other Than Personnel Services (OTPS)                   |                    |               |                  |
| <b>Consultant/Contractual Services (per</b>            | <b>Rate</b>        | <b>Hours</b>  | <b>Total</b>     |
| Nutritionist (\$60 per hour *150 hours)                | \$60               | 150           | \$9,000          |
| <b>Total Consultant/Contractual Services</b>           |                    |               | <b>\$9,000</b>   |
|                                                        |                    |               |                  |
| <b>Organizational and Program Expenses (per month)</b> | <b>Rate/ Month</b> | <b>Months</b> | <b>Total</b>     |
| Telephone Lease                                        | \$500              | 12            | \$6,000          |
| Telephone Usage                                        | \$1,000            | 12            | \$12,000         |
| Utilities                                              | \$150              | 12            | \$1,800          |
| Postage/month                                          | \$100              | 12            | \$1,200          |
| Office Supplies/month                                  | \$200              | 12            | \$2,400          |
| Office Equip - Maintenance and Rental                  | \$500              | 12            | \$6,000          |
| <b>Total Organizational and Program Expenses</b>       |                    |               | <b>\$29,400</b>  |
|                                                        |                    |               |                  |
| <b>Social/Client Services</b>                          | <b>Rate/ Month</b> | <b>Months</b> | <b>Total</b>     |
| Program/Rec. Activities Supplies/month                 | \$400              | 12            | \$4,800          |
| Recruitment/month                                      | \$200              | 12            | \$2,400          |
| <b>Total Social/Client Services</b>                    |                    |               | <b>\$7,200</b>   |
|                                                        |                    |               |                  |
| <b>Transportation</b>                                  | <b>Rate/ Month</b> | <b>Months</b> | <b>Total</b>     |
| Van Leasing                                            | \$350              | 12            | \$4,200          |
| Maintenance, Fuel, Insurance                           | \$275              | 12            | \$3,300          |
| Parking                                                | \$85               | 12            | \$1,020          |
| <b>Total Transportation</b>                            |                    |               | <b>\$8,520</b>   |
| <b>Total OTPS</b>                                      |                    |               | <b>\$54,120</b>  |
| <b>Total Supportive Services</b>                       |                    |               | <b>\$305,550</b> |

# 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



In-kind Resources



Donations

# 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 Self- Assessment Services



## Dimensions of Quality Supportive Housing Self-Assessment

### About the Quality Supportive Housing Self-Assessment Tool

We are excited that your agency is pursuing quality supportive housing! This self-assessment was created for providers of supportive housing (both scattered-site and site-based projects) to evaluate their performance, partnerships and agency practices according to the industry standards of [Quality Supportive Housing](#). This assessment is available both [online](#) and in paper format.

Within one week of submitting the self-assessment to [certification@csh.org](mailto:certification@csh.org) your agency will receive an emailed summary of your score in each of the Dimensions of Quality Supportive Housing and a corresponding resource list of training and technical assistance to support your agency in areas where your scores indicated room for improvement.

If you operate only scattered-site, please use the scoring tool on page 36. If you have questions when completing the self-assessment, please email [certification@csh.org](mailto:certification@csh.org).

### Demographic Questions

**Name of Organization:** [Click here to enter text.](#)

**Primary Contact Name** (Name of primary person completing self-assessment): [Click here to enter text.](#)

**Primary Contact Email address:** [Click here to enter text.](#)

**Agency mailing address:**

### Directions for Completing the Self-Assessment

In this assessment you will rate your project or agency to the best of your knowledge for each of the following indicators within the Dimensions of Quality Supportive Housing. This self-assessment contains 128 questions and should take about 90 minutes to complete. Based on your scores, this self-assessment will help CSH to create a tailored technical assistance resource guide and TA needs report.

Some of the assessment questions are specific to site-based supportive housing buildings (site-based projects), these questions are not always applicable to agencies that lease apartments using a scattered-site model. Site-based project questions will be noted as "SB" while scattered-site questions will be noted as "SS". These questions can be skipped if they do not apply to your agency. If you are only operating in a scattered-site context, please use the Scattered Site Scoring Tool on page 36.

After completing the self-assessment, email a scanned copy of your assessment to [certification@csh.org](mailto:certification@csh.org). Within one week of submitting your self-assessment your agency will receive an emailed summary of your score in each of the Dimension of Quality Supportive Housing and a corresponding resource list of available training and technical assistance to support your agency in areas where your scores indicated room for improvement.



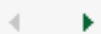




# Quality Supportive Housing Endorsement Checklist



|    |                                                   |                                                                                                                                                                                                                                   |                          |
|----|---------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|
| 1  |                                                   |                                                                                                                                                                                                                                   |                          |
| 2  | <b>Document Name (Organizational Documents)</b>   | <b>Requirements</b>                                                                                                                                                                                                               | <b>Select: Yes or No</b> |
| 3  | Mission Statement                                 | Demonstrate commitment to affordability                                                                                                                                                                                           | No                       |
| 4  | List of Board Members                             | Our organization has at least one person with lived experience on our organization's board.                                                                                                                                       | No                       |
| 5  | <b>Document Name (Site Documents)</b>             | <b>Requirements</b>                                                                                                                                                                                                               | <b>Select: Yes or No</b> |
| 6  | List of Neighborhood Amenities                    | Tenants can easily access a wide array of amenities on their own (grocery stores, community centers, health clinics, etc.).                                                                                                       | No                       |
| 7  |                                                   | 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.                                                             | No                       |
| 8  | Community Planning Narrative                      | 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. | No                       |
| 9  |                                                   | 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).                                                                  | No                       |
| 10 | <b>Document Name (Project Planning Documents)</b> | <b>Requirements</b>                                                                                                                                                                                                               | <b>Select: Yes or No</b> |
| 11 | Project Vision                                    | There are written goals and/or targeted tenant outcomes for the supportive housing project.                                                                                                                                       | No                       |
|    |                                                   | The project will have a reliable method for collecting and reviewing data on the                                                                                                                                                  | No                       |



**Checklist by Document**

Indicator Match & Commitment

Minimum Screening Requirements



# 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:

[www.csh.org/wp-content/uploads/2011/12/Tool\\_PropertyMgmtManual.pdf](http://www.csh.org/wp-content/uploads/2011/12/Tool_PropertyMgmtManual.pdf)

CSH PHA Toolkit: An online technical assistance resource for Public Housing Authorities and their partners who want to end homelessness.

[www.csh.org/phatoolkit](http://www.csh.org/phatoolkit)

Thank  
You!

Jane Bilger

[jane.bilger@csh.org](mailto:jane.bilger@csh.org)

Regina Cannon

[regina.cannon@csh.org](mailto:regina.cannon@csh.org)

Robyn Andrews

[robyn.andrews@csh.org](mailto:robyn.andrews@csh.org)