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## Section 4.2.1.....Development Description

### 90 Archer Street Apartments



#### **Project Summary**

**90 Archer Street** is a new construction project being developed by Charities Housing Development Corporation that will include 41 units of permanent, affordable rental housing for households at or below 45% of Area Median Income (AMI) and one 2-bedroom managers' unit. Offering Single Residency Occupancy Units, this project will set aside six units for mentally ill adults at or below 30% of AMI who are homeless or at risk of being homeless. The tenant portion of the rent for these six units will be the equivalent of 30% of a household's SSI income. This project provides a community meeting room with adjacent communal kitchen, lobby with an area set aside for computers that are available to the residents, lounge which contains comfortable seating, television and reading area, two offices--one for management and one for service delivery, and a laundry room with vending machines. This project is located at 90 Archer Street, in San José, at the corner of Kerley Drive and Archer Street.

### **Housing and Service Goals and Tenants to be Served**

The goal of this housing project will be to house with supportive services six (6) mentally ill individuals who are homeless or at risk of homelessness. All of the six MHSA units will be designated for MHSA tenants who are adult consumers. It will be the aim of those providing services to these tenants that they will be able to remain in this permanent housing site while accessing the services appropriate to their needs. As indicated in D.5, Case Managers and Peer Mentors will work with these individuals on a voluntary basis to enable them to enhance their independent living skills, obtain employment, increase their money management skills, obtain support from other sources, participate in support groups and social/recreational activities, and obtain other assistance as needed. Their Case Managers will also help them get connected to other services, including whatever the housing site staff coordinates for them and the other tenants.

### **Type of Housing**

90 Archer Street is permanent, affordable rental housing for households at or below 45% of Area Median Income (AMI) and offers Single Resident Occupancy units.

### **Way that the Housing will meet the Housing and Service Needs of the Tenants**

Case management services will be delivered at the housing site. In this way, the Case Managers will visit the tenants on a regular basis and attend to their needs appropriately. In this environment, the Case Managers will also organize and coordinate—while working with the housing staff on site—helpful workshops (see D.5), support groups, and social/recreational activities.

In addition, mental health counseling and medication assistance will be made available to the tenants at their usual appointments with their psychiatrists and medical professionals at the mental health and medical clinics located nearby. All of this support will enable the MHSA tenants to remain in their housing, increase their stability, and improve their healthy living.

### **Primary Service Provider**

The MHD will be the primary service provider. However, there are likely to be several service providers involved in the care of the MHSA tenants housed at this site. In order to facilitate a coordinated service delivery approach, the Housing Support Liaison will meet with representatives from the service providers involved and will coordinate the services that will be delivered on site. He/she will facilitate all meetings with the Case Managers and others, as needed, in order to ensure appropriate service delivery. Thus, the Housing Support Liaison will serve as the single point of contact for communicating between service providers and property management staff and coordinating supportive services for the MHSA tenants.

### **Development Partners**

Charities Housing Development Corporation (“CHDC”) is the Owner (Managing General Partner of 90 Archer L.P.) and Management Agent (“Agent”). It is the responsibility of the Owner to establish general policies under which the project will operate. The Owner shall establish guidelines in the Management Agreement and thereafter delegate to the Agent the authority and responsibility for carrying out these policies on a day-to-day basis.

The Agent will be required to consult the Owner prior to authorizing any action not clearly covered by the previous policy. Specifically, the Agent will be required to obtain the approval of the Owner before approving non-budget or over budget expenditures. In the event of an emergency, the Agent will take appropriate action and notify the Owner as soon as possible.

The Agent’s Director of Property Management will be the key contact person for the Agent. Any instruction to the Agent will be passed through the Director of Property Management to the Regional Property (also known as HUB) Manager.

**Development Financing**

The table below illustrates the current construction and permanent financing structure:

<b>Construction Sources</b>		
<b>Amount</b>	<b>Source</b>	<b>Status</b>
\$371,157	Santa Clara County HOME	Applied 1/09/09
\$123,000	FHLB-AHP	Applying 4/01/09
\$4,580,000	City of San Jose	Awarded 12/15/08
\$7,495,000	Wells Fargo	Preliminary Commitment
<b>Permanent Sources</b>		
<b>Amount</b>	<b>Source</b>	<b>Status</b>
\$6,648,770	Federal Tax Credits	Applying 4/6/09
\$2,261,486	State Tax Credits	Applying 4/6/09
\$4,580,000	City of San Jose	Awarded 12/15/08
\$600,000	County of Santa Clara MHSA	Applied 1/14/09
\$371,157	County of Santa Clara HOME	Applied 1/9/09
\$123,000	FHLP-AHP	Applying 4/1/09
\$373,705	Deferred Developer Fee	

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## **Section D.1.....Consistency with Three-Year Program and Expenditure Plan**

The 90 Archer Street Apartments Project is entirely consistent with Santa Clara County’s Mental Health Services Act (MHSA) Community Services and Supports (CSS) Plan in the way it was developed (planning process), philosophy, objectives, targeted population, and implementation design.

Planning Process: Santa Clara County’s MHSA CSS planning process was extraordinarily inclusive and participatory, incorporating the thoughts, beliefs, concerns, needs and preferences of 10,000 Santa Clara County residents through a year-long process of inreach and outreach. Likewise, Santa Clara County’s MHSA Housing Program planning has included thirteen consumer focus groups at self-help and community centers located in geographic areas throughout the county, and a consumer housing program survey that resulted in 562 responses. Input was gathered through meetings with mental health service providers, health care program managers, Call Center staff, adult custody mental health services staff, members of the Mental Health Department’s Ethnic and Cultural Community Advisory Committees, participants in the Santa Clara County Refugee and Immigrant Forum, and the County’s Mental Health Board. 136 individuals who devoted a half-day to expressing their opinions and sharing their experiences concerning supportive housing needs and priorities attended a large stakeholders meeting. Translators facilitated the contribution of this diverse group of participants for Spanish, Vietnamese, Tagalog, and Chinese speakers. Through all of these venues, information was gathered concerning housing options, service types and locations, staffing, tenant selection, and the other key housing plan elements.

Philosophy: The philosophy emanating from the inclusive planning process for MHSA supportive housing includes an emphasis on being consumer and family driven, culturally competent, supporting wellness and recovery, promoting self-sufficiency, utilizing graduated levels and flexible mixes of services, respecting privacy and human rights, and meeting the needs of consumers at all the ages and stages of their lifespan. This is entirely consistent with the MHSA CSS Plan, which includes the key elements: “a lifespan approach, community engagement and support, cultural competence throughout, a social ecology focus, an emphasis on connectedness, guided by recovery and resiliency-based models, consumer and family-driven, and based in strong system partnerships.”

Objectives: A key objective of Santa Clara County’s MHSA CSS Plan is to “reduce homelessness and increase safe and permanent housing.” Along with supporting this critical element of the CSS Plan, the Santa Clara County MHSA Housing Plan and this housing development also further the achievement of other key CSS objectives, which include a “reduction of subjective suffering from mental illness, increase meaningful use of time and capabilities, increase natural network of supportive relationships, reduction in disparities in service access, and increase in self help and consumer/family involvement.”

Targeted Population: Consistent with the MHSA Housing Program regulations, at this housing site the Santa Clara County Mental Health Department (MHD) will be serving seriously mentally ill, low-income adults who meet the criteria for MHSA services and who are homeless or at risk of homelessness.

Of the 7,202 unhoused people in Santa Clara County (a conservative number since it does not include the marginally housed), 29% were chronically unhoused. Slightly more than 51% of homeless survey respondents indicated they had been homeless for one year or more, and almost 45% indicated they received no government assistance through General Assistance, Food Stamps, WIC, SSI/SSDI, CalWorks, Medi-Cal/Medi-Care, Social Security or Veterans benefits. Nearly 52% of respondents said they were experiencing a disabling condition—including physical disability, developmental disability, mental illness, depression, PTSD, alcohol or drug use, HIV/AIDS, or chronic health problems. 23% indicated that they were experiencing mental illness, while 37% were experiencing depression and 13% were experiencing PTSD. (*Santa Clara County Homeless Census and Survey, 4/07*).

A 2002 study of emergency room visits at five of Santa Clara County’s 13 hospitals showed 558 adults making eight or more ER visits during the previous 12-month period. Of these 558, 120 patients were selected for an in-depth assessment, and it was found that 71% had a history of mental health problems (*New Directions Report, Santa Clara County, 2004*).

Therefore, targeting adults for this project is consistent with the criteria used for selection of initial populations for the first three years of MHSA CSS funding, which included:

- Current inequity in service utilization,
- Prevalence of problems with meeting basic human needs,
- Most closely related to loss of liberty and independence,
- Incurring the greatest societal costs (institutionalization, placement, hospitalization and incarceration),
- Most closely related to individual and community safety, and
- Most often selected as important to consumers, families and other stakeholders.

Implementation Design: The proposed project is consistent with Santa Clara County’s MHSA CSS Full Service Partnerships Work Plan in that it provides, per the CSS Plan: “stable housing and needed mental health supports, including building life skills for recovery and successful community tenure.” It fulfills the CSS Work Plan goal of furnishing “a broad scope of integrated services” that will include “psychiatric, medical, social supports, self-help and family involved.”



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## **Section D.2..... Description of Target Population to be Served**

Consistent with the MHSa Housing Program regulations, at this housing site the Santa Clara County Mental Health Department (MHD) will be serving seriously mentally ill, low-income adults with severe mental illness who meet the criteria for MHSa services and are homeless or at risk of homelessness, according to the definitions specified in the application.

Consistent with the County's *Community Services and Support Plan*, the target population to be housed and served in this housing complex will be the following:

**1. Mentally Ill Homeless, Jail-Involved, ER Frequent Users and Dually Diagnosed**, defined as:

Adults with persistent, serious mental illness who have multiple, co-existing disorders resulting in multiple psychiatric hospitalizations, chronic homelessness, substance abuse, multiple incarcerations, chronic medical conditions leading to multiple ER visits, and other physical disabilities. This population is not typically interested or ready for traditional treatment, often leading to multiple discontinued treatment episodes. This population has distress across several life domains, and this compounds the treatment of their mental and substance abuse issues.

**2. Unserved and Underserved SMI Adults**, defined as:

Adults who have a mental disorder, which is severe in degree and persistent in duration, including schizophrenia and major affective disorders. As a result of the mental disorder, the person has substantial functional impairment in one or more life domains (e.g., independent living, social relationships, vocational skills, and/or their physical condition) or the person has a psychiatric history demonstrating that without treatment there is imminent risk of decomposition.

**In addition, all qualified tenants must meet one of the following two criteria:**

1. Consumers must be "mid-level users" of services at clinics/contract agencies, that is seriously mentally ill clients who do not currently need 24-hour, institutional care and are able to live independently with supportive services. These are consumers who are homeless or at risk of homelessness (according to MHSa Housing Program Application) and who:
  - a) use outpatient services and are usually dependent on such;
  - b) are able, with support, to manage their Activities of Daily Living and medications in an independent living situation; and

c) have severely limited income and are assumed to have a continuing income deficiency for the next 12 months.

(This includes new consumers who have previously been unserved.)

2. **Consumers who are homeless or at risk of homelessness and who have left a 24-hour care setting** and have demonstrated success or completed their stay in a transitional or residential care facility and can move to permanent supportive housing as a next step in their recovery.

Note: The staff at the County clinic or contract agency can determine which consumers fulfill these criteria and then refer the candidate to MHD according to the Tenant Selection Process.

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## **Section D.3..... Tenant Referral and Certification Process**

**ENCLOSURES:** MHPA Housing Program Application Form  
MHPA Housing Program Tenant Certification Form  
Consent to Release Confidential Health Information Form

### **Referral Process**

1. Any service provider that participates in the MHD's System of Care and that serves the older adult population can refer a consumer to this housing program. Taking into consideration the qualifying criteria established by the State (as stated in the MHPA application) and the additional criteria specified by the MHD (as stated in D.3 The Tenant Selection Plan), the consumer's Case Manager will make an initial determination that he/she is potentially qualified for the housing that is identified in this application. Also, that Case Manager will fill out the required documentation (as specified in D.3) and submit it to the MHD's designated staff person, the Housing Development Consultant, who will continue the tenant selection process (as noted in D.3).
2. The MHD Housing Development Consultant will inform the service providers in the MHD System of Care of the eligibility criteria delineated in the Tenant Selection Plan (D.3), and they will determine if they have individuals who are potentially qualified.
3. Service providers will submit to MHD the names of individuals who are potentially qualified and ready for housing, and the MHD will decide which individuals are qualified. To do this, the service providers will fill out the *MHPA Housing Program Application Form*, the *MHPA Housing Program Tenant Certification Form* and the individual's *Consent to Release Confidential Health Information Form*.

### **Certification Process**

1. Once these forms are turned in, the MHD will verify that the information presented in the enclosed forms is accurate—thereby certifying that the individuals are indeed qualified for this housing, sign the *MHPA Housing Program Tenant Certification Form*, and inform (in writing within seven (7) business days of the receipt of the names) the appropriate service provider of the certification of its respective applicants. If any applicants are not certified, the MHD will inform the service provider of the reason(s). Only applicants that have been certified as eligible for MHPA housing may obtain tenancy in MHPA Housing Program-funded units.



2. MHSA certification does not take into consideration factors such as credit history, eviction history, or criminal history. The housing provider may collect this background information after a certified applicant is referred for a particular unit. MHSA housing providers are expected to work with MHD service providers to provide reasonable accommodations to individuals with poor tenant histories given the intention of the MHSA Housing Program.

### **Maintenance of Waitlist**

1. The MHD will track the tenants to be housed in all MHSA designated units. For reporting purposes, MHD staff will maintain the waitlist by project site and the list of all MHSA tenants housed in the MHSA housing units. MHD staff will maintain copies of all completed *Consent to Release Confidential Health Information Forms*, *MHSA Housing Program Application Forms* and a list of all certified applicants in chronological order according to the date applications were received. This list will contain enough applicants to fill MHSA unit vacancies in a timely fashion.
2. The MHD staff person establishes the waitlist by project site and maintains it as follows:
  - a) The waitlist will be comprised of all certified qualified MHSA tenants in the chronological order in which they were certified.
  - b) On an as-needed basis, the MHD staff person reviews the updated waitlist in order to select the next applicant when a unit becomes available.
  - c) When the MHD staff person sees that an appropriate unit will become available, he/she contacts in writing the Case Manager of the next prospective tenant on the waitlist in order to take the necessary steps to get that person ready to move into his/her unit. If that person does not want to be considered for that unit, he/she may maintain his/her place on the waitlist and be notified of the next available unit.
  - d) The Housing Support Liaison will guide the qualified tenant in filling out the lease documentation required for the respective housing site.
  - e) After the tenant moves into his/her unit, the MHD staff person updates the waitlist appropriately.
  - f) If a prospective tenant is not certified for tenancy in a specific unit, the MHD will notify the individual in writing and provide a basis for non-selection; and the MHD will also notify the individual of his/her right to appeal the decision.
  - g) Since the waitlist is established and maintained for each MHSA Housing Program project site, certified tenant applicants can be on more than one waitlist at a time.
3. The certification waitlist will be reviewed and updated on an ongoing basis. To remain on the list, an applicant must remain eligible for the MHSA Housing Program, i.e., they must continue to meet all of the aforementioned eligibility criteria. If the applicant no longer meets one or more of the eligibility criteria, the referring agency will notify the MHD and the individual will be removed from the list. The referring agency will notify the applicant in writing about any pending removal from the list and will give him/her an opportunity to appeal this decision within ten (10) business days. The referring agency will submit the appeal request to the MHD within one (1) business day of receipt. The MHD will respond to the referring agency within the appeal decision notification period with the final decision. The referring agency may resubmit an applicant that is removed from the list when the list reopens and the applicant meets all eligibility criteria.

4. The MHD will monitor and promote fair representation from different age and ethnic populations that are to be housed through this program.

### **Compliance with Fair Housing Law**

1. All MHD staff and contractors shall adhere to this policy, whose governing laws shall include the provisions of Title VI of the Civil Rights Act of 1964 (42 USC 2000d et seq.), Title VIII of the Civil Rights Act of 1968 (42 USC 3601 et seq.), and the provisions of the Rumford Act and Unruh Act in California Law.
2. All advertising shall conform to Section 804 (c) of Title VIII of the Civil Rights Act of 1968 (42 USC 3604 (c)), as amended, which makes it unlawful to make, print or publish, or cause to be made, printed, or published any notice, statement or advertisement, with respect to the sale or rental of a dwelling, that indicates any preference, limitation, or discrimination based on race, color, religion, ancestry, sex, national origin, age, sexual orientation, gender identity, marital status, families with children, medical condition, source of income, and physical or mental disability, or an intention to make such preference, limitation or discrimination.
3. All radio, TV, or newspaper advertising, pamphlets, or brochures used will identify the project's handicap accessibility and contain the appropriate fair housing logotype or the equal housing opportunity slogan. In all space advertising, the equal housing opportunity logotype statement or slogan shall be of a size which conforms to the standards of Fair Housing Advertising. Any human models used in photographs, drawings or other graphic techniques shall portray persons in an equal social setting and shall indicate that the housing is open to all without regard to race, color, religion, ancestry, sex, national origin, age, sexual orientation, gender identity, marital status, families with children, medical condition, source of income, and physical or mental disability (must possess capacity to enter into legal contract) and is not for exclusive use of one such group.
4. Each and every MHD and contractor staff person must take the time to ensure that this policy is carried out when dealing with persons who inquire or apply for housing.
5. It should be noted that persons applying as a result of special outreach may be ill at ease and may appear unwilling to cooperate with staff in the application process. All personnel must be willing to take the time to explain the housing program, the requirements and the benefits. It is the responsibility of the staff person to refer the client to the appropriate person if they do not have the information. Staff shall make a positive effort to provide all applicants with all the assistance and information they need. Periodically, the MHD will arrange for training on fair housing issues for all those involved in this project.

### **Appeals Process**

If a consumer has any problem with the tenant selection or certification processes, he/she can follow the established appeals process, delineated in the *MHD Policies and Procedures*, #222 (“Client Problem Resolution Process”).



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## Section D.3..... Tenant Selection Plan

**ENCLOSURES:** Santa Clara County Income Limits  
MHSA Housing Program Application Form  
MHSA Housing Program Tenant Certification Form  
Consent to Release Confidential Health Information Form

**REFERENCE:** *California Welfare and Institutions Code*  
*MHD Policies and Procedures, #222* (“Client Problem Resolution Process”)

**PROCEDURES:**

Responsible Party	Action
Qualified Tenants	<p><b>Tenant Eligibility Factors:</b></p> <ol style="list-style-type: none"> <li>1. Qualified tenants must meet the requirements established by the Mental Health Services Act Housing Program. Individuals must be:               <ol style="list-style-type: none"> <li>a) “Seriously mentally ill”:                   <ul style="list-style-type: none"> <li>• Low income adults or older adults with serious mental illness as defined in <i>California Welfare and Institutions Code</i> 5600.3(b)(1); and</li> <li>• Children with severe emotional disorders as defined in <i>California Welfare and Institutions Code</i> 5600.3(a)(1), and their families</li> <li>• Who, at the time of assessment for housing services, meet the criteria for MHSA services in their county of residence.</li> </ul> </li> <li>b) “Homeless,” which means living on the streets, or lacking a fixed, regular, and adequate nighttime residence. (This includes shelters, motels and living situations in which the individual has no tenant rights.)</li> <li>c) Or “at risk of homelessness,” which includes:                   <ul style="list-style-type: none"> <li>• Transition-age youth (as defined in <i>Welfare and Institutions Code</i> Section 5487(c), and in Title 9, <i>California Code of Regulations</i>, Section 3200.80) exiting the child welfare or juvenile justice systems.</li> <li>• Individuals discharged from institutional settings including:                       <ul style="list-style-type: none"> <li>- Hospitals, including acute psychiatric hospitals, psychiatric health facilities (PHF), skilled nursing facilities (SNF) with a certified special treatment program for the mentally disordered (STP), and mental health rehabilitation centers (MHRC)</li> <li>- Crisis and transitional residential settings</li> </ul> </li> </ul> </li> </ol> </li> </ol>

<p>Tenants</p>	<ul style="list-style-type: none"> <li>• Individuals released from local city or county jails</li> <li>• Individuals temporarily placed in residential care facilities upon discharge from one of the institutional settings cited above</li> <li>• Individuals who have been assessed and are receiving services at the county mental health department and who have been deemed to be at imminent risk of homelessness, as certified by the county mental health director.</li> </ul> <p>2. Qualified tenants must have a household income below 30% of the current Area Median Income for a given household size (See Attachment A). Once the tenant has taken possession of the unit, their income may increase and become subject to tax credit and other regulatory limitations and their rent may also be raised to the maximum allowable rent. When an MHSA household income exceeds 30% of AMI, the household will be placed on the internal transfer list for the applicable new income level (40% or 50% AMI). Once that transfer takes place, the next available unit at 30% AMI will be allocated to MHSA. Until the transfer takes place, the household is considered MHSA even if their income exceeds 30%.</p> <p>3. In addition, to be qualified, tenants must meet all of the following Santa Clara County requirements:</p> <ul style="list-style-type: none"> <li>a) Be “mid-level users” of services at clinics/contract agencies, that is, seriously mentally ill clients who do not currently need 24-hour, institutional care and are able to live independently with supportive services. These are consumers who are homeless or at risk of homelessness (according to MHSA Housing Program Application) and who: <ul style="list-style-type: none"> <li>• use outpatient services and are usually dependent on such;</li> <li>• are able, with support, to manage their Activities of Daily Living and medications in an independent living situation; and</li> <li>• have severely limited income or are assumed to have a continuing income deficiency for the next 12 months;</li> </ul> <p>(This includes new consumers who have previously been unserved.)</p> </li> <li>b) Have left a 24-hour care setting and have demonstrated success or have completed their stay in a transitional or residential care facility and can move to permanent supportive housing as a next step in their recovery;</li> <li>c) Be certified as eligible for MHSA housing; and</li> <li>d) Be approved by the MHD staff according to criteria established by the MHD.</li> </ul>
<p>Service Providers</p>	<p>Note: Staff at the clinic or contract agency will determine which consumers fulfill these criteria and refer the candidate to the MHD according to the Tenant Selection Process that is defined below.</p>
<p>Housing Development Consultant</p>	<p><b>Tenant Selection Assumptions:</b></p> <p>1. MHD staff will notify the service providers that are a part of the MHD-funded System of Care of the number of units that are available to be filled and the time constraints associated with them.</p>

Service Providers	2. MHD staff maintains a waitlist of consumers who are qualified for this housing.
MHD staff	3. Service providers will submit to the MHD the names of individuals who are potentially qualified and ready for housing, and the MHD will decide which individuals are qualified. To do this, the service providers will fill out the <i>MHSA Housing Program Application Form</i> , the <i>MHSA Housing Program Tenant Certification Form</i> and the individual's <i>Consent to Release Confidential Health Information Form</i> .
HDC	4. Once these forms are turned in, the MHD will verify that the information presented in the enclosed forms is accurate—thereby certifying that the individuals are indeed qualified for this housing—sign the <i>MHSA Housing Program Tenant Certification Form</i> , and inform (in writing within seven (7) business days of the receipt of the names) the appropriate Service Provider of the certification of its respective applicants. If any applicants are not certified, the MHD will inform the Service Provider of the reason(s). Only applicants that have been certified as eligible for MHSA housing may obtain tenancy in MHSA Housing Program-funded units.
Referring Agency	5. MHSA certification does not take into consideration factors such as credit history, eviction history, or criminal history. The housing provider may collect this background information after a certified applicant is referred for a particular unit. MHSA housing providers are expected to work with MHD service providers to provide reasonable accommodations to individuals with poor tenant histories given the intention of the MHSA Housing Program.
MHD staff	6. A vacancy exists among the MHSA designated units. 7. The MHD will track the tenants to be housed in all MHSA designated units. For reporting purposes, MHD staff will maintain the waitlist and the list of all MHSA tenants housed in the MHSA housing units. MHD staff will maintain copies of all completed <i>Consent to Release Confidential Health Information Forms</i> , <i>MHSA Housing Program Application Forms</i> MHD and a list of all certified applicants in chronological order according to the date applications were received. This list will contain enough applicants to fill MHSA unit vacancies in a timely fashion. 8. The certification waitlist will be reviewed and updated on an ongoing basis. To remain on the list, an applicant must remain eligible for the MHSA Housing Program, i.e., they must continue to meet all of the aforementioned eligibility criteria. If the applicant no longer meets one or more of the eligibility criteria, the referring agency will notify MHD and the individual will be removed from the list. The referring agency will notify the applicant in writing about any pending removal from the list and will give him/her an opportunity to appeal this decision within twenty (20) business days. The referring agency will submit appeal request to MHD within one (1) business day of receipt. The MHD will respond to the referring agency within the appeal decision notification period with the final decision. The referring agency may resubmit an applicant that is removed from the list when the list reopens and the applicant meets all eligibility criteria.

Service Provider	<p>9. The MHD will monitor and promote fair representation from different age and ethnic populations that are housed through this program.</p> <p>10. For a household member (spouse, significant other, friend or acquaintance) of the consumer being considered for housing, an agreement could be established between the consumer and the service provider indicating what will be asked of the other person. The consumer can ask for something like this in order to protect his tenancy when there are other household members involved. The consumer's Case Manager would help him/her with this and would periodically ask the consumer if the agreed upon terms of the agreement were being followed. This could take the form of a simple letter and could include some of the following:</p> <ul style="list-style-type: none"> <li>a) proof of being family member or significant other;</li> <li>b) an income = to SSI or a letter from MD stating why that's not possible: accommodation or have willingness to participate in services that will help him/her obtain income;</li> <li>c) the lease will be in both names and the family member will be responsible for an agreed-upon portion of the rent;</li> <li>d) involvement in the consumer's recovery or is helping to facilitate it and/or is willing to participate in instruction or guidance about the consumer's mental illness;</li> <li>e) volunteering in the community or is employed;</li> <li>f) assuming responsibilities within the housing community: e.g, monitor other children, lead community meetings, etc.; and</li> <li>g) having the willingness to learn basic housekeeping skills.</li> </ul> <p><u>Note:</u> If a family member or significant other is housed with a consumer, he/she must be aware of the fact that if the consumer loses unit or leaves the program for whatever reason, the family member or significant other will have to vacate the unit within 60 to 90 days.</p>
All parties	<p>11. According to the provisions of Title VI of the Civil Rights Act of 1964 (42 USC 2000d et seq.), Title VIII of the Civil Rights Act of 1968 (42 USC 3601 et seq.), and the provisions of the Rumford Act and Unruh Act in California Law, <u>there will be no discrimination</u> based on race, color, religion, ancestry, sex, gender identity, national origin, age, sexual orientation, marital status, families with children, medical condition, source of income, and physical or mental disability.</p> <p>12. All involved parties will comply with all applicable state and federal law governing confidentiality of medical and health information including, but not limited to, <i>California Welfare &amp; Institutions Code</i> section 5328, <i>et seq.</i>, and the HIPAA, 45 C.F.R. parts 160 and 164.</p>
HDC	<p><b>Tenant Selection Process:</b></p> <p>1. MHD will communicate the availability of this housing among the Mental Health System of Care and the service partners of the County Collaborative</p>

Service Providers	on Housing and Homelessness Issues.
HDC	2. Service providers submit potential candidates to the MHD.
HDC	3. MHD staff receives candidates, confirms qualified status, and places the candidates on the waitlist.
HDC	4. Once a consumer is certified, the MHD staff notifies his/her case manager, provides him/her with a copy of the certification and sends a letter to the property manager of the MHSA Housing Program site, indicating that the consumer is an approved, qualified applicant for one of the designated MHSA units at the site.
HDC	5. When a vacancy exists among the MHSA designated units, the MHD staff contacts the Case Manager of the next available applicant on the waitlist. He also informs the Housing Support Liaison, who will meet with the applicant and his/her Case Manager to review all potential issues related to making an application for the unit. This will help to clarify if any reasonable accommodation request will have to be made during the application and if any appeal of a potential denial will have to be prepared. Also, this will help to ensure that the applicant is indeed “ready” to apply. If there are issues with the applicant’s background, rental history, or income, the Property Manager meets with applicant, his/her Case Manager and the Housing Support Liaison to address the issues in a way that facilitates the applicant’s smooth transition into tenancy. Once approved by property management, either the applicant or his/her representative—which could be his/her Case Manager—pays the initial deposit and first month’s rent directly to the Property Manager.
Housing Support Liaison	
Property Manager	
HDC	6. The MHD staff person establishes the waitlist and maintains it as follows:
	a) The waitlist will be comprised of all certified qualified MHSA tenants in the chronological order in which they were certified;
	b) On an as-needed basis, the MHD staff person reviews the waitlist in order to select the next applicant when a unit becomes available;
	c) When the MHD staff person sees that an appropriate unit will become available, he/she contacts in writing the Case Manager of the next prospective tenant on the wait list in order to take the necessary steps to get that person ready to move into his/her unit. If that person does not want to be considered for that unit, he/she may maintain his/her place on the waitlist and be notified of the next available unit.
	d) The Case Manager will guide the qualified tenant in the filling out of the lease documentation required at the respective housing site.
Service Provider	e) After the qualified tenant moves into his/her unit, the MHD updates the waitlist appropriately.
HDC	f) If a qualified tenant is not selected for tenancy in a specific unit, the housing provider will notify the individual in writing and provide a basis for non-selection. The housing provider will also notify the individual of his/her right to appeal the decision.
	g) If during the course of his/her tenancy an MHSA tenant is diagnosed as no longer meeting medical necessity due to dementia or another illness, he/she will be discharged by his/her Case Manager. If this happens, the

<p>All staff</p>	<p>client is no longer considered an MHSA tenant and when another similar unit becomes available, a new MHSA tenant will be selected according to the process stated above.</p> <p><b>Compliance with Fair Housing Law:</b></p> <ol style="list-style-type: none"> <li>1. All MHD staff and contractors shall adhere to this policy, whose governing laws shall include the provisions of Title VI of the Civil Rights Act of 1964 (42 USC 2000d et seq.), Title VIII of the Civil Rights Act of 1968 (42 USC 3601 et seq.), and the provisions of the Rumford Act and Unruh Act in California Law.</li> <li>2. All advertising shall conform to Section 804 (c) of Title VIII of the Civil Rights Act of 1968 (42 USC 3604 (c)), as amended, which makes it unlawful to make, print or publish, or cause to be made, printed, or published any notice, statement or advertisement, with respect to the sale or rental of a dwelling, that indicates any preference, limitation, or discrimination based on race, color, religion, ancestry, sex, national origin, age, sexual orientation, gender identity, marital status, families with children, medical condition, source of income, and physical or mental disability, or an intention to make such preference, limitation or discrimination.</li> <li>3. All radio, TV, or newspaper advertising, pamphlets, or brochures used will identify the project's handicap accessibility and contain the appropriate fair housing logotype or the equal housing opportunity slogan. In all space advertising, the equal housing opportunity logotype statement or slogan shall be of a size that conforms to the standards of Fair Housing Advertising. Any human models used in photographs, drawings or other graphic techniques shall portray persons in an equal social setting and shall indicate that the housing is open to all without regard to race, color, religion, ancestry, sex, national origin, age, sexual orientation, gender identity, marital status, families with children, medical condition, source of income, and physical or mental disability (must possess capacity to enter into legal contract) and is not for exclusive use of one such group.</li> <li>4. Each and every MHD and contractor staff person must take the time to ensure that this policy is carried out when dealing with persons who inquire or apply for housing.</li> <li>5. It should be noted that persons applying as a result of special outreach may be ill at ease and may appear unwilling to cooperate with staff in the application process. All personnel must be willing to take the time to explain the housing program, the requirements and the benefits. It is the responsibility of the staff person to refer the client to the appropriate person if they do not have the information. Staff shall make a positive effort to provide all applicants with all the assistance and information they need. Periodically, MHD will arrange for training on fair housing issues for all those involved in this project.</li> </ol>
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Applicant	<p><b>Appeals Process:</b>          If a consumer has any problem with the selection process, he/she can follow the established appeals process, delineated in the <i>MHD Policies and Procedures</i>, #222 (“Client Problem Resolution Process”).</p>
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Tenant eligibility and selection criteria are entirely consistent with both the Santa Clara County MHSAs CSS Plan and the MHSAs Housing Program target population. Tenants will meet the primary MHSAs service requirements that include being seriously mentally ill, low-income and homeless or at risk of homelessness. Consistent with the MHSAs Housing Program, clients’ eligibility will be determined based on an evaluation of their level of functioning and the likelihood that their needs can best be met in a supportive housing environment.

**Charities Housing Development Corporation, the developer of this housing project, will implement the property management Tenant Screening and Tenant Selection Process for the applicants for the non-MHSA units.**



*Dedicated to the Health  
Of the Whole Community*

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DRAFT

## **Section D.4.....Supportive Services Plan**

A decent, safe and affordable place to live is an essential human need with a direct bearing on health and well-being; and the supportive services necessary to make decent, safe and affordable housing accessible to mental health consumers is a critical resource that is necessary to achieve the goals of a comprehensive and effective mental health system. The MHD recognizes the vital importance of housing and the crucial need to increase housing options, particularly for unserved and underserved consumers who are homeless or at risk of homelessness, who have co-occurring disorders, who are victims of abuse or neglect, or who have involvement with the criminal justice system.

The fundamental need for housing received strong support from across the extremely broad spectrum of stakeholders that participated in Santa Clara County's extensive process of inreach and outreach. Through this, 10,000 voices contributed their input into the MHSA Community Services and Support Plan. The importance of supportive housing was always high on the list of recommendations made by consumers of mental health services and their family members, MHD staff and contract mental health service providers, other community service providers, representatives of law and justice, experts in the field of aging and adult services, and the long list of other participants.

This particular Supportive Services Plan addresses the housing needs of mental health consumers who are adults and who access services from either County service teams or agencies providing services in accordance with contracts with the MHD. All entities responsible for the care of the consumers at this site will sign an addendum to the Lease Agreement and/or amendment to their County contract that specifies their housing/service-related responsibilities.

### **Philosophy Underlying the Delivery of Supportive Services**

#### **Housing First**

"Housing first" is the goal that the MHD will be striving to achieve through this approach to supportive housing. The aim is to immediately house people who currently do not have housing with the belief that housing must come first, no matter what is going on in one's life. It is further believed that housing must be varied and flexible in order that people are able to get housed easily and stay housed. "Housing first" can be contrasted with a continuum of housing "readiness," which typically subordinates access to housing to other requirements.

#### **Harm Reduction**

"Harm reduction" is a set of practical strategies that reduce the negative consequences associated with drug or alcohol abuse, including safer use, managed use, and non-punitive abstinence. These strategies meet drug users "where they're at," addressing conditions and

motivations of drug use along with the use itself. Harm reduction acknowledges an individual's ability to take responsibility for his/her own behavior. This approach fosters an environment in which individuals can openly discuss substance use without fear of judgment or reprisal and does not condone or condemn drug use. Staff working in a harm reduction setting work in partnership with tenants and are expected to respond directly to unacceptable behaviors, whether or not the behaviors are related to substance abuse. Note: The service providers will adhere to all federal regulations as they apply to any housing project or site where qualified consumers are housed, especially as they involve any zero tolerance drug policy. This may cause a contradiction to this "harm reduction" approach, because a particular housing site may require a zero tolerance drug policy because of funding or contracting requirements. The MHD will seek to minimize the involvement in such sites in order to maximize the flexibility for the consumers and service providers involved.

### **Recovery and Habilitation**

"Recovery" is a personal process through which an individual can choose to change his or her goals, with the ultimate objective of living a healthy, satisfying, and hopeful life despite limitations and/or continuing effects caused by his or her mental illness. "Habilitation" is a strength-based approach to skills development that focuses on maximizing an individual's functioning. In this approach it is recognized that the recovery and habilitative services planned collaboratively with the qualified consumer in this environment need to be individualized and focused on a holistic approach that strives to recognize that self-sufficiency is achievable, improve the tenant's quality of life, and help him/her regain personally meaningful social roles. Finally, this approach recognizes and respects the different meanings and styles of implementation of recovery of different cultures.

### **Individualized Wellness and Recovery Action Planning**

Case management and other mental health staff will work individually with the consumers residing at this project to enable them to take responsibility for their mental and physical health, thereby, enhancing their self-sufficiency, developing their abilities, improving their health, enhancing their social networks, finding meaningful roles in the community, providing health education opportunities, mitigating health and behavioral risks, and seeking out peer support. Together they will identify strategies to achieve desired results that will enable the consumers to maintain their health and stability while remaining in their housing. The staff will note these results in their individualized Wellness Recovery Action Plans.

### **Zero Tolerance for Housing Discrimination**

The MHD will take seriously any report of discrimination involving any of its qualified consumers and will investigate thoroughly all such reports until the matter is resolved. The MHD recognizes that discrimination may manifest itself by individuals or groups in a variety of ways, i.e., toward a tenant's diagnosis, behavior, ethnicity, sexuality, etc. In order to address such discrimination effectively, the MHD will pursue educating affected individuals, monitoring the housing sites, and responding to all reported instances.

### **Right to Confidentiality**

The qualified consumer's right to confidentiality is respected. This right applies to the dissemination, storage, retrieval and acquisition of identifiable information. The service providers will not release information to a landlord about a tenant's receipt of services without a written release from the tenant.

### **Right to Privacy**

The qualified consumer's right to privacy is respected. Information will be requested from the tenant only when the information is specifically necessary for the provision of services. Tenants will be required to supply information relevant to their care only after signing a release of information form as a condition of obtaining services that are a part of this program.

### **How qualified consumers will be assessed**

Any service provider that participates in the MHD's System of Care and that serves the adult population can refer a consumer to this housing program. Taking into consideration the qualifying criteria established by the State (as stated in the MHSA application) and the additional criteria specified by the MHD (as stated in D.3, The Tenant Selection Plan), the consumer's Case Manager will make an initial determination that he/she is potentially qualified for the housing that is identified in this application. The Case Manager's approach will be to do a strengths-based assessment of the consumer's needs. Also, that Case Manager will fill out the required documentation (as specified in D.3) and submit it to the MHD's designated staff person, the Housing Development Consultant, who will continue the tenant selection process (as noted in D.3).

### **The Service Providers**

Any service provider that participates in the MHD's System of Care can refer a consumer to this housing program and provide services to him/her while he/she is a tenant in any of the housing sites designated in this application. Whether the consumer is referred by a Case Manager from a County mental health clinic, a Full Service Partnership-contracted provider or another mental health provider, he/she will receive the personalized attention that they need and deserve during the time that he/she is housed. This individualized attention provided with the service philosophy mentioned previously will enable the individual to remain in his/her housing, even if he/she decompensates and needs to be hospitalized or enter a recovery program. Finally, the staff involved in the consumer's care will meet on a regular basis to integrate their work with the consumer and chart his/her progress according to his/her individualized Wellness Recovery Action Plan.

### **How the Services Have Been Designed to Meet the Specific Needs of the Target Population**

The services will be consumer driven. Believing that there is no "one size fits all" type of housing and supportive services, the service providers will offer their services in a graduated level of support, according to the needs and ability levels of the consumers themselves. Also, this dynamic is reflected in this application in that housing options—with their appropriate array of services—will be made available to the eligible consumers and they will have a say in their choice of housing setting. Thus, the decisions on which type of housing and responsible living setting will be made by consumers and staff jointly. The support services

will be tailored according to the consumers' needs and will draw upon the Adult System of Care and other avenues of assistance outside that system.

## **How the Services Offered Support Wellness, Recovery and Resiliency**

The service providers will receive training on the philosophy that is the basis for how services will be provided in this program; this includes receiving training in recovery and resiliency concepts, and the openness to employ wellness and recovery strategies to meet the consumers' needs. This approach embraces the concept of person-centered recovery services. Fundamental to this approach is working with the strength and resilience that each individual has acquired within his/her life experiences and capitalizes on the innate strength of the individual. Secondly, this model embraces the concept of community recovery, which emphasizes the need for the individual to connect with the community, and establish social relationships that are not attached to his/her treatment. It also recognizes that the individual—along his or her path to recovery and wellness—will occasionally confront challenges and stresses that will impede recovery and that services must be immediately available to ensure continued achievement of the person's recovery and wellness goals. This approach normalizes the process of recovery and reduces stigma.

The consumers will learn to articulate specific measurable results they desire in each life domain (health/well-being, living situation/home, education/work, and safety). They will identify those strategies to achieve their desired results that will enable them to maintain their health and stability while remaining in their housing. Their Case Manager will note these results in their individualized Wellness Recovery Action Plans. All tenants will agree to do their part of their service plan, which may include specific treatment strategies (i.e., trauma-based CBT, medication, Anger Reduction Therapy, family therapy, substance abuse treatment, etc.), a living plan (where to live, who to live with, how to be successful, friends, support network, etc.), and a safety plan (what to do to keep safe and keep others safe, who to call in a crisis, etc.).

In view of this dynamic work between the consumers and their Case Manager, self-help and self-advocacy are important elements in recovery and how services will be delivered in this project. Two models that have been adopted by the MHD are the Wellness Recovery Action Plan and Procovery.

1. The Wellness Recovery Action Plan, developed by Mary Ellen Copeland, is a simple, safe method for monitoring recovery and helping people take charge of their lives.
  - a) The plan is based on five recovery principles: hope, personal responsibility, education, self-advocacy, and support.
  - b) The plan is voluntary and is developed by the individual who wants to use it.
  - c) Supporters (not only peers) provide feedback and encouragement throughout the process.
  - d) Developing a Wellness Recovery Action Plan can be a lengthy process and must be done at the individual's own pace.
  - e) Prior to the expression of the plan is the development of the Wellness Toolbox, i.e., an assessment of their personal strengths.
  - f) There are six parts to a Wellness Recovery Plan: Daily Maintenance, Triggers, Early Warning Signs, When Things Are Breaking Down, Crisis Plan, and Post-Crisis Plan.

2. Procovery, developed by Kathleen Crowley, is an approach to healing based on hope and grounded in practical everyday steps that individuals can take to move forward in their lives.
  - a) There are eight principles fundamental to Procovery, such as “focus forward not backward” and “focus on life not illness.”
  - b) The keynote of Procovery is the trademark “Just start anywhere.”
  - c) There are twelve strategies to implementing Procovery, whether by staff, individuals, family, or systems. These are:
    - i. Detoxify the diagnosis—changing the manner in which a diagnosis is given and received.
    - ii. Take practical partnering steps.
    - iii. Manage medications collaboratively.
    - iv. Build—and most critically do not extinguish—hope.
    - v. Create and support change.
    - vi. Dissolve stigma, particularly internal stigma.
    - vii. Use feelings as fuel for Procovery.
    - viii. Gather, utilize and maximize support.
    - ix. Stick with Procovery during crises and use those times to initiate Procovery.
    - x. Adopt effective self-care strategies.
    - xi. Live intentionally through work and activities.
    - xii. Actively retain Procovery.

The consumers’ Case Managers will assess their recovery needs and work with them to get them connected to the services appropriate to his/her needs. He/she will determine with the consumer which approach to his/her recovery will be most helpful to him/her. If the consumer would benefit from developing a Wellness Recovery Action Plan or any other approach, the Case Manager will be present to him/her at every step along the way. He/she will empower the tenant to get into rehab, get involved in relevant support groups, get involved in other healthy activities and develop peer and family (where appropriate) support. All tenants will learn to recognize the importance of social relationships and connections in achieving healthy living. These relationships and service connections will offer specific services to the individual, as they are needed (e.g., cooking, household maintenance, life coaching, legal assistance, employment assistance, transportation, shopping, recreation, etc.). A key ingredient to the success of dually diagnosed consumers will be their participation in support groups, either the twelve step or Health Realization models. Where possible, these groups will be offered on site. If that is not possible, then the consumers’ Case Managers will work with them to enable them to participate in such groups wherever it is feasible for them to do so.

Finally, services provided will vary according to tenants’ level of need. An emphasis will be placed on the availability of support groups, workshops, and family or group activities, such as those mentioned in D.5. This approach will be exemplified by a utilization of the available family, non-related family members, age-appropriate peers and current service providers actively involved in creating this agreed-upon structure of support.

## **How the Services Will Assist the Tenant in Obtaining and Maintaining Benefits to Which They Are, or May Be, Entitled, Such as Cash Assistance and Medical Benefits**

The Case Manager who is working with each consumer/tenant has the primary responsibility of enabling the individual to both access and maintain all the benefits to which he/she qualifies. This entails frequent and ongoing contact with the appropriate governmental offices and facilitating the paperwork and transportation necessary to ensure the tenant is consistently prepared and able to arrive at the appropriate facilities on a timely basis.

Also, the Santa Clara County Department of Social Services has committed to dedicating at least three (3) Benefits Specialists to work with the homeless to help them obtain their benefits in a timely manner. The Case Managers will work closely with these specialists so that their consumers will be successful in obtaining and maintaining their cash assistance and medical benefits. If the consumer's benefits are ever interrupted or cancelled, the Case Manager will work diligently with the Benefits Specialists in order to ensure that the benefits are restored. He/she will communicate with the housing site staff to make sure they are aware of the status of the consumer's income and ability to pay his/her rent.

In addition, the MHD is implementing a new software (called *Report Assistant*) approach to help therapists complete an SSI application for consumers. It is currently loaded on several PCs at the MHD Call center; and after a four-month pilot at one clinic, it will be made available to the therapists at other clinics.

## **Whether Services Will Be Delivered On-Site or at Other Locations in the Community**

Most likely there will be several service providers involved in the care of the MHSA tenants housed at this site. In order to facilitate a coordinated service delivery approach, the Housing Support Liaison will meet with representatives from the service providers involved and will coordinate the services that will be delivered on site. He/she will facilitate all meetings with the Case Managers and others as needed in order to ensure appropriate service delivery and review all potential issues related to ensuring that the consumer is ready to make an application for an available housing unit. Thus, the Housing Support Liaison will serve as the single point of contact for communicating between service providers and property management staff and coordinating supportive services for the MHSA tenants.

Case management services will be delivered at the housing site. In this way, the Case Managers will visit the tenants on a regular basis and attend to their needs appropriately. In this environment, the Case Managers will also organize and coordinate—while working with the housing staff on site—helpful workshops (see D.5), support groups, and social/recreational activities. In addition, mental health counseling and medication assistance will be made available to the tenants at their usual appointments with their psychiatrists and medical professionals at the mental health and medical clinics located nearby. The tenants will be able to access those and other off-site services through the help of their Case Manager, family/friends, through public transportation or Outreach, a non-profit paratransit provider.

In this light, the tenants will be taught bus routes and all modes of transportation available based on their needs.

## **Frequency of Contact between Supportive Services Staff and MHSA Tenants**

Services will be made available to all the MHSA tenants on a regular basis, depending on the tenant's level of care and his/her needs. Regular, in-home supportive services may be needed for some tenants on an ongoing basis, including assistance with food preparation, house cleaning and education on medication self-management. The frequency of basic services will vary from daily (personal hygiene assistance, food, supervision) to the other end of the spectrum for very independent clients, which could involve monthly contact with their Case Manager and utilization of other services on an as-needed and as-desired basis. The Case Manager will provide linkages to community day services that either interest or are necessary for the MHSA tenants. Finally, sensitivity to the adult's culture and language will be maintained.

Peer Mentors will work with the Case Managers to provide on-site services to the tenants as specified in D.5. This will make possible even more frequent contact with the tenants.

## **Staffing Levels**

The staffing levels will correspond to the level of consumers' need. All MHSA tenants will have a designated Case Manager and have access to the service team at the clinic to which they are attached. The staff members of the service team include a psychiatrist, a vocational rehabilitation specialist, rehabilitation counselor, therapist (LCSW/MFT), and peer mentors. When appropriate, the Case Manager will connect tenants to other staff available through the county or contract agency with which he/she works. Finally, all services will be delivered in a linguistically appropriate and culturally sensitive manner.

## **Process for Assessing the Supportive Service Needs of Tenants**

The Case Manager will assess MHSA tenants' service needs, including mental health services, income assistance, housing, personal hygiene, personal health or medical issues/concerns, educational goals, transportation needs, employment or volunteering opportunities, etc. This assessment will address the medical, psychosocial and functional status needs of the adults housed at this site. The Case Manager's approach will be to do a strengths-based assessment of the consumer's needs. This will include appropriate planning in the event of crisis or involuntary psychiatric hospitalization. If an MHSA tenant is institutionalized as a result of a documented disability or otherwise absent for a documented disability from his/her unit for 90 days or longer, the tenant or Case Manager may request a reasonable accommodation in order for the unit to be kept available for up to 90 days, as long as the rent is paid. At the end of the 90-day period, the tenant or Case Manager may request an extension. Any reasonable accommodation is subject to the approval of the property management company.



In order to be knowledgeable concerning the range of a tenant's service needs, the Case Manager will consult with other staff members and service partners who may be involved in the care of his/her tenants. These findings will guide the tenant and his/her Case Manager in determining the level of services needed, the type of living environment that is preferred, and the way that his/her individualized treatment plan will take shape. Finally, the Case Manager will educate the tenant on community programs that are available to consumers and their families.

## **Procedures for Ongoing Communication between the Property Management and Supportive Services Staff to Assist Tenants in Maintaining Housing Stability**

The collaborative relationship between the MHD, the service providers, the landlord, the property management company, and the housing site staff is integral to this Plan and is detailed in the Memorandum of Understanding developed for this site. In addition, *Release of Information* forms will be presented to all qualified consumers in order to allow for appropriate sharing of information among all parties involved in the housing program. In view of that, all those participating in this program will keep the following items in mind:

1. This Plan is about enabling qualified consumers to obtain housing that is appropriate to their needs and unavailable to them through other resources. However, this approach to housing qualified consumers is more than just housing; it is a program that gives tenants the opportunity to set and prioritize goals, save money, learn new skills and develop their skills. This approach can be a bridge to their future, empowering them to accomplish their goals toward greater health and a higher quality of life.
2. The qualified consumers' initiative and cooperation as tenants is of utmost importance in order to promote harmonious and pleasant living conditions at the housing site. The observance of requirements and guidelines set forth in the House Rules related to housing site will help the tenants, their neighbors, and the landlord maintain the housing development as an outstanding place to live.
3. The tenants participating in this housing will be responsible for respecting and abiding by the maintenance procedures that are in place at this site in order to do their part to properly maintain their apartment and any common areas on the property.
4. The Housing Support Liaison will serve as the single point of contact for communicating between the service provider and property management staff and coordinating supportive services for the MHSA tenants. In this role, the Housing Support Liaison will facilitate regular meetings to discuss issues related to service delivery at the site.
5. The service providers working with the tenants will provide any coaching and support that will help them maintain their apartment. This will ensure responsible behavior by their tenants; help build the tenants' self-esteem; and foster a clean and healthy living environment.
6. If there are any safety issues arising from any home visit, the service providers working with the tenants will use discretion in communicating with the landlord or housing site staff about the issues and will work with the tenants until the issues are resolved.
7. The housing site staff will have ready access to the MHSA tenants' Case Managers and supervisory staff. In case of any emergency or emerging need, they will have the appropriate phone numbers in order to contact the Housing Support Liaison and/or a County Case Manager in a timely manner.

8. In case of any significant behavioral problem exhibited by the MHSA tenant that may affect his/her tenancy, either the housing staff, the Housing Support Liaison or the Case Manager can call a “case conference” through which the problem will be addressed and resolved in an appropriate and timely basis. To address repetitive problems, the appropriate follow-up service activities will occur according to the level of severity exhibited by the tenant.
9. MHD staff will offer training to the housing site and property management staff concerning the special circumstances of the MHSA tenants.
10. Finally, MHD staff will be available for consultation or mediation assistance if the service providers need such guidance to help resolve housing-related issues.

## **Strategies for Engaging Tenants in Supportive Services and in Community Life**

The strategies that will be used by the service providers to engage their tenants in supportive services include:

1. Having their Case Managers and Peer Mentors engaging them on a one-to-one basis, thereby strengthening their trusting relationship;
2. Providing transportation assistance;
3. Organizing fun activities;
4. Coordinating language and culturally specific activities;
5. Offering incentives for participation;
6. Combining food with educational and social activities; and
7. Offering services and activities on-site or in close proximity to tenants’ housing.
8. Creating social outlets at the housing site that foster connections to self as well as the community where they live. This could be community barbeques, sharing groups and supporting local volunteer efforts, etc. Coordinating these outlets well will attract them to other similar opportunities.

## **Plan for Helping Tenants Maintain Their Housing and Achieve Self-Sufficiency, Including Employment Services, Budgeting and Financial Training, Educational Opportunities, and Other Community Services That Will Be Made Available to Tenants**

As mentioned previously and delineated in D.5, the staff involved in the tenants’ care will offer a broad range of topics for workshops and classes. These include budgeting and money management, personal grooming assistance, emotion and medication management, and other self-directed independent living skills trainings.

In addition to this, the Peer Mentors involved in providing services to their tenants will:

- Accompany tenants to site and work with them throughout the application, rent-up and move-in process.
- Help tenants obtain the security deposit/rent assistance from the appropriate agency.
- Collaborate with housing staff on rent-payment issues and redirect tenants to housing site staff if questions arise.

- Prepare tenants for late payment issues.
- Support tenants' efforts to get to know the housing staff.
- Guide tenants through the rent-paying process.
- Instruct/coach tenants on how to take care of, clean, upkeep his/her unit.
- Provide any coaching and support that will help their tenants maintain their unit. This will promote responsible behavior by the tenants, help build the tenants' self-esteem, and foster a clean and healthy living environment.
- Show tenants how they can take initiative to solve problems, e.g., a noisy neighbor.
- Encourage tenants to participate fully in activities on site.

The Case Managers will:

- Link the tenants to the County's self-help centers and all the programming activities provided at those sites.
- Help tenants deal with consequences of their inappropriate conduct in public.
- Advise tenants on how to handle emergencies and after-hours work requests.
- Help tenants find other housing, if necessary.

The Housing Support Liaison will:

- Advise tenants on any and all requests for reasonable accommodation of services or reasonable modification of their unit.
- Reinforce tenants' awareness of House Rules and the process whereby infractions are addressed.
- Conduct periodic, informal home visits of tenants' units. If there are safety issues arising from any home visit, the liaison will use discretion in communicating with the landlord or housing site staff about the issues and will work with the tenants until the issues are resolved.
- Conduct with management those health and safety checks that are appropriately warranted.
- Provide the appropriate guidance to help tenants maintain their unit and thereby prevent any eviction.
- Be available for consultation or mediation assistance if the tenants need such guidance to help resolve housing-related issues.
- Explain alternatives to eviction.
- Work with property management to handle tenants' property if they abandon the unit or die.

## Section D.5.....Attachment F

**Housing Site:** 90 Archer Street Apartments

**DRAFT**

### SUPPORTIVE SERVICES CHART

List all services to be provided to tenants of the MHSA Housing Program units, including any in-kind services essential to the success of your Supportive Services Plan. Feel free to add additional lines to the Supportive Services Chart table as needed.

Supportive Service	Target Population	Service Provider(s)	Service Location
Case management services, intake and assessment and assistance with: benefits assistance, culturally relevant language services, development of individual wellness/recovery action plans, employment assistance linkage, in-home support linkage, legal assistance linkage, medical/dental/podiatry care linkage, rehab/recovery program linkage, transportation help linkage, life-alert system linkage, and volunteering linkage.	Adults	Case Manager as member of a Service Team	On site or where appropriate for the tenant: accessed by Case Manager, public transportation, family/friends or Outreach paratransit service
Additional peer support services (role modeled to help their recovery and self-transformation): budgeting/money management, obtaining deposit assistance, food and clothing, move-in assistance (obtaining furnishings and supplies, moving in, learning procedures, getting phone and utilities connected)	Adults	Peer Mentor and/or Housing Support Liaison	On site or where appropriate for the tenant: accessed by Case Manager, public transportation, family/friends, or Outreach paratransit service
Counseling	Adults	Psychiatrist/Rehab Counselor or Case Manager of the Service Team	Respective mental health clinic: accessed by Case Manager, public transportation, family/ friends or Outreach paratransit service
Educate significant others about MHSA residents' mental health issues	Adults	Case Manager	On site or where appropriate for the tenant
Family support	Adults	Case Manager will involve the appropriate family member(s) in the tenant's care.	On site
Community meetings	Adults	Housing Staff	On site
Medication/symptom management	Adults	Psychiatrist/Rehab Counselor of the Service Team	Respective mental health clinic: accessed by Case Manager, public transportation, family/ friends or Outreach paratransit service
Self-directed independent living skills training (workshops/classes), including: exercise activities, personal grooming guidance, meal planning/food/nutrition assistance, cooking, apartment maintenance, personal growth opportunities, etc.	Adults	Peer Mentor or Case Manager of respective service provider	On site and Consumer Self-Help Center: accessed by Case Manager, public transportation, family/ friends or Outreach paratransit service
Support groups	Adults	Peer Mentor or Case Manager	On-site, at mental health clinic or elsewhere

<b>Supportive Service</b>	<b>Target Population</b>	<b>Service Provider(s)</b>	<b>Service Location</b>
Recreational/social/educational opportunities	Adults	Services Coordinator	On site
Crisis Response	Adults	Housing Support Liaison or Case Manager	On site
Tenancy issues training (emergency preparedness, fire drills, lease reviews)	Adults	Housing Staff	On site
Possible volunteering opportunities	Adults	Case Manager	On site, or where appropriate for the tenant, accessed by the Case Manager, public transportation, family/ friends or Outreach paratransit service

**Primary Service Provider:** County of Santa Clara Mental Health Department outpatient service provider (County or Contract staff)