

# CLIENT-CENTERED HOUSING STABILITY PLANS

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HOME BASE TRAINING – APRIL 24, 2019

# AGENDA

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- What is a Housing Stability Plan?
  - Key Principles
  - Housing Stability Plans – what, who, when, & why
- Creating a Housing Stability Plan
  - Step 1: Assessment of Housing Barriers & Strengths
  - Step 2: Goal Setting & Action Planning
  - Step 3: Supporting Long-Term Housing Stability
  - Step 4: Monitoring Progress & Follow-up

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# PRINCIPLES OF HOUSING STABILITY PLANNING

Housing First  
approach

Strengths-based &  
empowers client  
to achieve goals

Resolving the  
housing crisis

Recognizes  
participant choice

Individualized for  
each client &  
flexible in intensity

# WHAT MAKES A HOUSING STABILITY PLAN DIFFERENT?

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Singular focus on assessing barriers to housing & achieving housing stability



For clients not currently housed, the primary goal is to develop a strategy to assist them in securing housing



Once housed, the goal is to ensure that adequate supports are in place & linkages to community resources are made so the client can stabilize & maintain housing

# DEFINING THE GOAL OF HOUSING STABILITY

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- Resolution of the crisis of homelessness by obtaining permanent housing
- Client has resources & capacity to:
  - Afford & pay rent on time, as relevant
  - Follow the terms of their lease
  - Meet other housing requirements to maintain permanent housing for the foreseeable future

# HOUSING READINESS

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- Housing stability does not mean fixing all the client's problems
- No need for mandatory programming prior to moving into housing
- No need to be sober or pursuing recovery
- No need to be “compliant” with mental health treatment
- All clients are housing ready

# MAKING A (HOUSING STABILITY) PLAN!

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- Identify:
  - Barriers to housing & steps to mitigate or resolve them
  - Client's strengths & steps needed to build on those strengths
  - Available resources & path to obtain those resources
- Document all steps client & case manager will take to move toward permanent housing
- Include both short- & longer-term goals & timelines
- Build in flexibility to respond to progress & changing circumstances

# WHO DEVELOPS THE PLAN?

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- Case manager & household/individual client
- Client leads the process to establish housing goals
- Case manager supports follow-through on goals
- Other case managers and/or housing specialist can be involved, as needed



# BEST-PRACTICE STAFFING OPTIONS

## Housing Specialist

- Understands needs & concerns of landlords
- Identifies housing resources
- Recruits landlords
- Helps assess housing needs
- Landlord/tenant law expertise

## Case Manager

- Provides support/case management during housing search & after placement
- Makes linkages to mainstream benefits & community resources
- Assesses strengths/barriers to securing & retaining housing
- Makes home visits

# WHEN DOES THE CLIENT CREATE THE PLAN?

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- Make a plan right away – the sooner, the better!
- Anytime a client is in any form of housing that is not permanent:
  - Place not meant for human habitation
  - Emergency Shelter
  - Transitional Housing

# WHY IS IT IMPORTANT TO HAVE A PLAN?

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- Provides a roadmap for the client & the case manager
- Breaks down housing goal into attainable steps to make the process more manageable
- Goals & responsibilities are clear, so everyone knows who is working on what & why

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**Step 1**

**Assessment of Housing Barriers & Strengths**



**Step 2**

Goal Setting & Action Planning



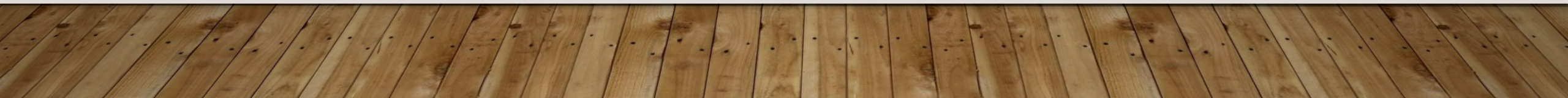
**Step 3**

Supporting Long-Term Housing Stability



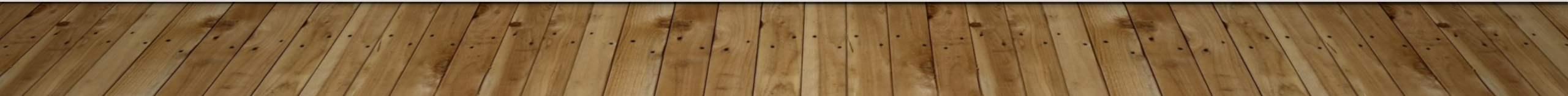
**Step 4**

Monitoring Progress & Follow-up



**STEP 1:  
ASSESSMENT OF HOUSING BARRIERS &  
STRENGTHS**

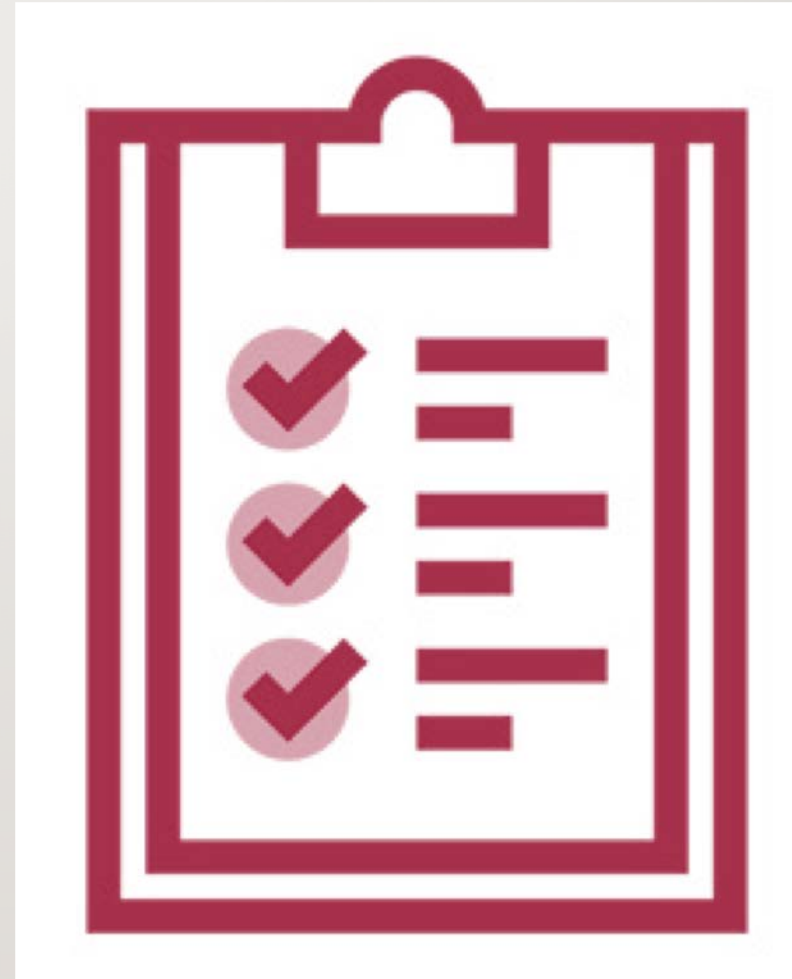
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# CHECKLIST: CLIENT ASSESSMENT

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- Explain the process & goals
- Discuss client's housing history & preferences
- Run a credit report
- Public records check of evictions
- Contact previous landlords
- Identify client's strengths & barriers



# ASSESSMENT – EXPLAINING THE PROCESS & GOALS

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- Before the Assessment: Set an Expectation of Housing Focus
  - At intake, discuss permanent housing as the goal of the program
  - Make housing-focused culture evident from agency bulletin boards, materials, intake paperwork, etc.
  - Start discussions about housing & development of Housing Plan ASAP
- During the Assessment: Explain the Process
  - Explain the Housing Plan goals & process – how goals & actions will be set, how often meetings will take place, approach to monitoring progress
  - Provide as much information as possible about roles & expectations
  - Be responsive to client concerns

# ASSESSMENT – HOUSING HISTORY

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- What was the last place where the client lived that worked well? What about that situation made it work well?
- Has the client had a lease before? How did that go?
- Does the client have past evictions?
- Has the client lived in subsidized housing before?
- Has the client tried applying for a new lease recently? What was the outcome?
- Does the client have any concerns about moving into their own place?



# ASSESSMENT – CLIENT PREFERENCE

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- What type of housing arrangement would the client prefer now? In the future?
- Where would the client like to live?
- Is there anywhere the client wants to avoid, e.g., due to domestic violence or recovery from substance abuse?
- Where does the client have a network of family and/or friends?

# UNDERSTANDING CLIENT PREFERENCES

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- Client preference should guide the plan
- Usually, will have to compromise
  - Discuss limitations due to barriers
  - Identify with client what is most important & what is negotiable
- Consider pets, reasonable accommodations, proximity to family, friends, or other supports that may be important to maintaining housing

# ASSESSMENT – CLIENT STRENGTHS & BARRIERS

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- What are the client's resources, including income, work experience, & social network?
- How can actions or circumstances which led to the client's housing crisis be resolved or mitigated?
- What other barriers interfere with the client's ability to regain stable housing?
- What supports will the client need to move into & maintain stable housing?
- How well can the client solve problems & access services, independently and/or with support?

# COMMON BARRIERS TO HOUSING

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- No rental history
- Evictions
- Larger family (3+ children)
- Single parent
- Head of household <18
- Sporadic employment history
- Recent criminal history
- Limited English proficiency
- Debts/insufficient savings
- No high school diploma or GED
- Insufficient or no income
- No or poor credit history
- Housing-related debts (back rent, utilities)
- Chronic homelessness
- Substance abuse/use
- Domestic violence
- Lack of valid ID
- Lack of tenancy knowledge
- Unresolved legal issues

# CLIENT STRENGTHS

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- Positive references from previous landlords, employers, community members (e.g., church or local leaders)
- Experience as a tenant
- Work experience, education, or skills
- Ability to develop rapport with landlord & neighbors
- Willingness/motivation to work on plan
- Income or employment
- Support from family, faith-based, or other community network
- Completion of classes (e.g., tenancy, job training) & certificates
- Experience with problem solving & navigating systems
- Appealing personal story such as military history, steps taken to resolve challenges, goals for future

# TIPS & TRICKS: ASSESSMENT

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- Use assessment to focus & limit interventions to address specific housing barriers
- Focus on barriers to permanent housing – *Is this preventing this client from getting into permanent housing right now?*
  - If yes, then these are the main priorities
  - Barriers to obtaining vs. barriers to maintaining housing
- Will use barriers to shape housing plan
- Assessment should be ongoing – revisit & revise priorities as barriers are resolved or mitigated

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Step 1

Assessment of Housing Barriers & Strengths

Step 2

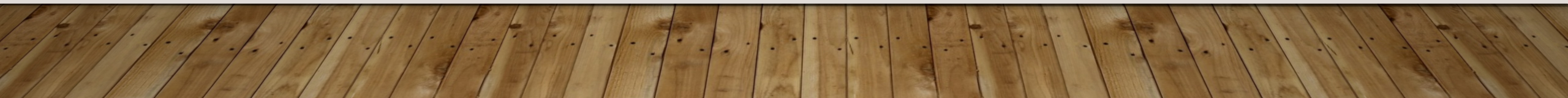
**Goal Setting & Action Planning**

Step 3

Supporting Long-Term Housing Stability

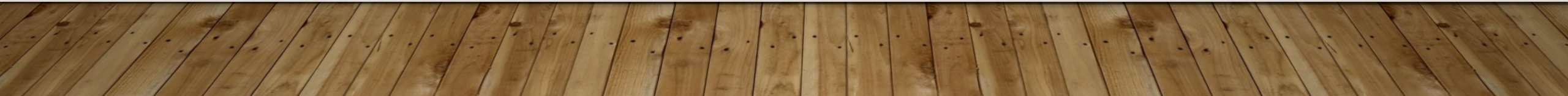
Step 4

Monitoring Progress & Follow-up



**STEP 2:**  
**GOAL SETTING & ACTION PLANNING**

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OVERARCHING GOALS OF  
HOUSING STABILITY  
PLANNING

Stable housing

Increase/stabilize  
income to support  
obtaining or maintaining  
stable housing

Make linkages to mainstream &  
community resources to support &  
prevent recurrence of homelessness

# HOUSING-FOCUSED GOALS

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- Use assessment of strengths/barriers to conduct a **client-centered process** to set goals related to:
  - Obtaining housing, including resolving tenant screening barriers
  - Meeting lease requirements
  - Increasing/maintaining income, obtaining employment, & developing budgeting skills
  - Acquiring independent living skills that support housing stability
  - Addressing service needs for mental health or substance abuse issues that may cause barriers to permanent housing
  - Reducing debt, repairing credit history, increasing independence
- Clients have input & final decision-making for all goals, actions steps, & timelines
- Techniques such as Motivational Interviewing can support process

# CHECKLIST: GOAL SETTING

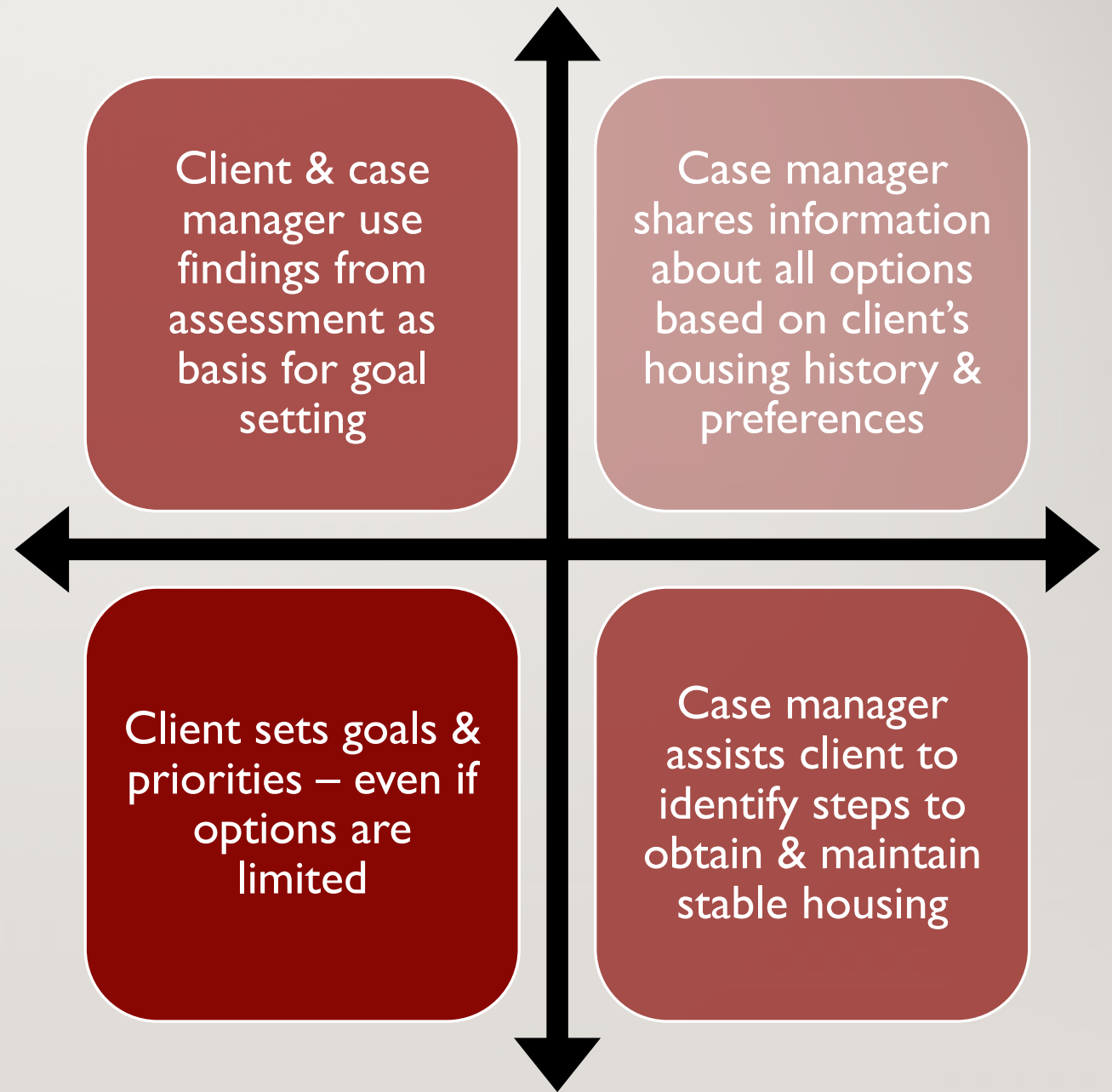
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- Include both short- & long-term goals
- Break goals down into steps that can be accomplished between meetings
- Action steps to achieve goals should be:
  - Clear & easy to understand
  - Measurable
  - Can be accomplished in a short period of time
- Indicate what support is needed to achieve each goal
- Specify tasks to be completed by client & case manager



# CLIENT & CASE MANAGER ROLES

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# SHORT-TERM VS. LONG-TERM GOALS

## Often Short-Term

- Obtaining ID or other documentation
- Researching housing listings daily
- Creating a resume
- Identifying resources for move-in costs
- Understanding requirements of landlord/tenant relationship
- Increasing hours in current employment
- Obtaining/increasing benefits
- Connecting with legal service provider to resolve urgent legal issues/record expungement
- Reconnecting with family

## Often Long-Term

- Securing a full-time job or multiple part-time jobs to afford rent
- Applying for disability and/ or other income supports
- Securing unpaid child support
- Reducing or consolidating debt
- Improving/repairing credit
- Obtaining medical benefits & regular care
- Seeking treatment for behavioral health conditions
- Participating in community activities to strengthen social network
- GED, English language courses, and/or other adult education

# TIPS & TRICKS: GOAL SETTING

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- Focus on most pressing barriers to housing
- Goals & process should emphasize client choice & empowerment
- Each goal should identify the outcomes to be achieved
- Make sure that progress towards each goal can be measured
- Ensure that goals are achievable & do not exceed client's willingness/ability
- Remember, the process may not be linear – but must be client-centered!

# TIPS & TRICKS: ACTION STEPS

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- Break goals into bite-sized action steps with concrete timelines
- Clearly identify roles of client, case manager, housing locator, & any others
- Identify actions that may feel overwhelming, & work with client to create a plan for how the action will be accomplished
- Ensure each action relates to securing stable housing as soon as possible
- Focus on solutions – creative troubleshooting & positivity are key!
- Limit number of actions committed to at each meeting to 3-4

# TIPS & TRICKS: PLAN IMPLEMENTATION

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- Focus every check-in on the previously-identified goals & action steps
- Establish an expected pattern of emphasis on the Housing Plan
- Document Housing Plan progress & next steps at every check-in
- Promote independence – assist with trouble-shooting & connections to resources & support in an empowering way that honors client strengths
- Remember: The focus is on obtaining safe, secure housing first & foremost. People are much better at addressing underlying issues **AFTER** they are housed



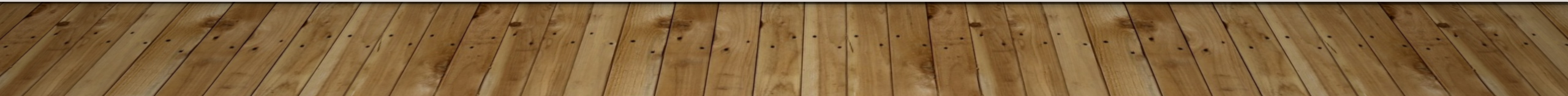
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**STEP 3 :**  
**SUPPORTING LONG-TERM HOUSING STABILITY**

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# CONNECTING CLIENTS TO SERVICES & RESOURCES THAT SUPPORT STABLE HOUSING

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- Provide tenant education & supports to ensure lease compliance
- For RRH, increasing income should be the central focus if client cannot remain housed with current income
- Maximizing the amount of income available for rent to support stable housing by:
  - Connecting clients with mainstream benefits to help cover household expenses such as food, utilities, & healthcare
  - Identifying community resources that can provide free or low-cost goods & services

# SUPPORTING THE HOUSING LOCATION PROCESS

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- Build network of landlords who trust you & your agency
- Position client to succeed
  - Give landlord a chance to meet your client – & prepare client for the interview
  - Work with client to compile letters of recommendations
  - Support client in writing letter to landlord explaining story, steps taken to change circumstances, & goals
  - Connect client to “good tenant” workshops or certificate programs
- Ensure landlord has a highly responsive contact at your agency in case issues arise

# CHECKLIST: TENANT SUPPORTS & LEASE COMPLIANCE

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- ❑ Explain lease requirements & consequences of violations & evictions
- ❑ Provide simplified breakdown of most important lease components
- ❑ Make a do's & don'ts list to better understand common lease violations
- ❑ Discuss how to build respectful relationships with landlord & neighbors
- ❑ Provide information on submitting a maintenance request & how to follow up
- ❑ Practice responses to complaints from other tenants or requests for a repair
- ❑ Mediate issues & suggest methods for achieving compliance with the lease
- ❑ Provide expedited access to legal assistance for tenancy issues that may arise



# TIPS & TRICKS:TENANT SUPPORTS

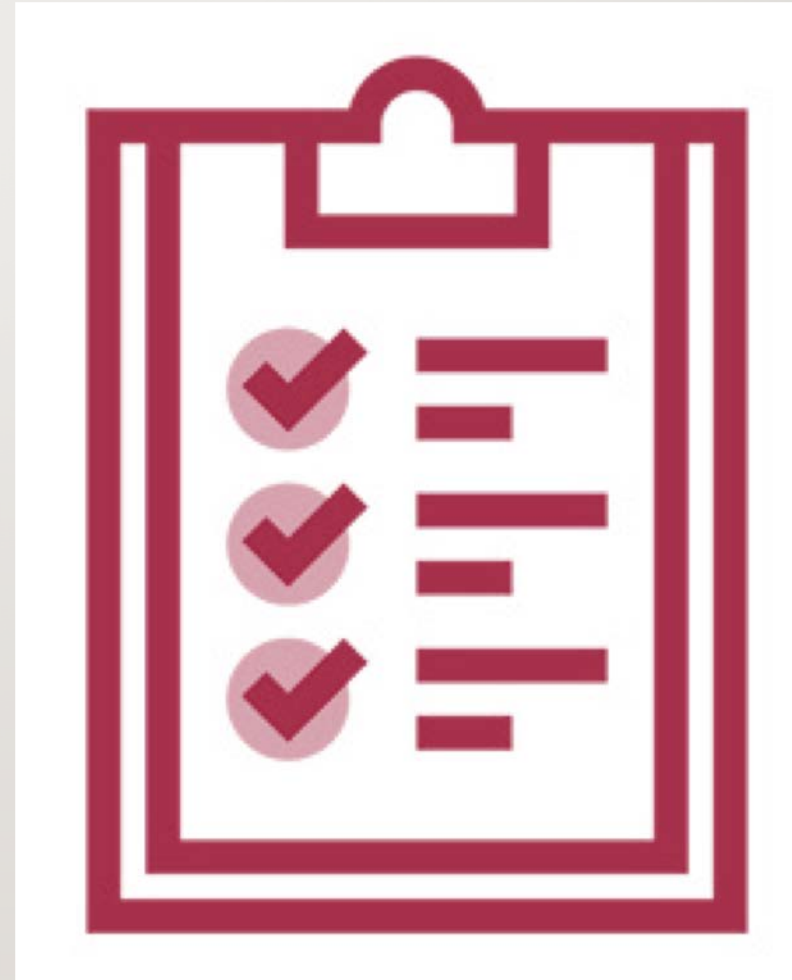
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- Establish communication process with client & landlord – reach out frequently, i.e., monthly
- Focus on lease compliance & preventing eviction
- Use lease requirements to structure case management plan
- Schedule frequent home visits, especially in first few months
- Use communication with client & landlord to probe for any issues that may threaten tenancy

# CHECKLIST: BUDGETING & INCREASING INCOME

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- Coordinate closely with employment service providers
- Help client write a resume
- Help client identify potential references
- Set up practice interviews for client
- Connect with life skills program, depending on job readiness
- Connect clients to a credit counselor to try to reduce monthly debt payments



# BUILDING YOUR CLIENT'S SUPPORT NETWORK

## Mainstream Resources

- Benefits advocates & enrollment assistance
- Legal aid agencies that can assist with pending legal issues
- Food assistance programs
- Employment/workforce development programs
- Subsidized mass transit program
- Free community college, literacy, GED, & ESL programs
- Credit restoration programs

## Community-Based Supports

- Faith community if religious affiliation
- Identity-based community (LGBTQ, ethnic-based CBOs, & social groups)
- Programs for households with aging adults (adult day care, senior centers, in-home supportive services)
- Programs for households with children & youth (child care, after-school programs, tutoring)
- Nutrition education & counseling programs
- Support groups (single parenting, loss/grief, recovery)



# BARRIERS TO BENEFITS

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- Complicated application process
- Obtaining medical records & disability documentation
- Denials of claims for incomplete applications
- Lengthy appeals process
- Criminal history
- Frequent client relocation & difficulty locating clients
- Eligibility workers lack homeless cultural competency/appropriate training
- Lack of transportation to & from benefits offices

# CHECKLIST: OVERCOMING BARRIERS TO MAINSTREAM BENEFITS

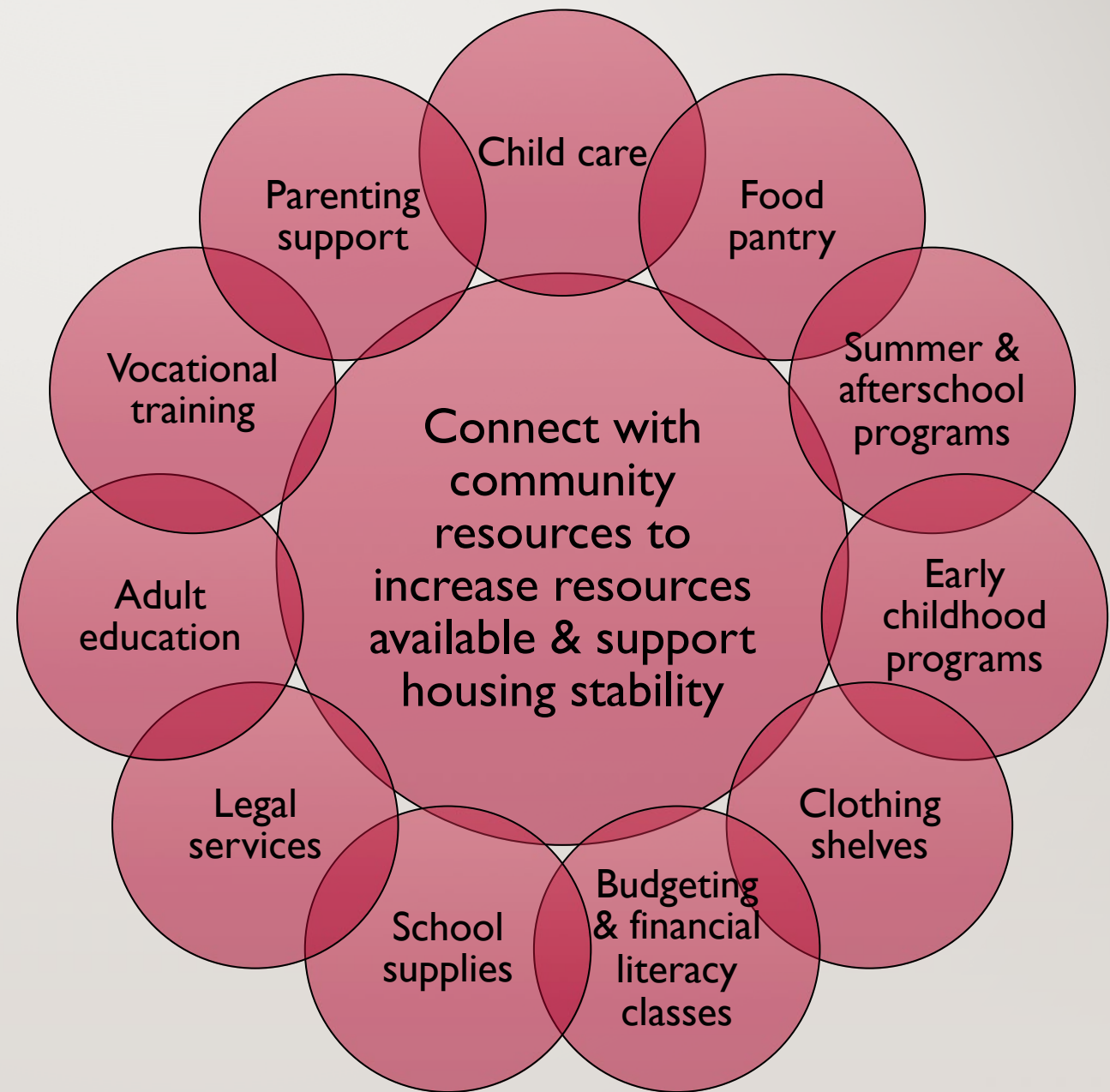
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- Assist clients with completing forms, gathering documents, & prepping for appointments
- Provide translation for appointments
- Help obtain necessary ID or documents
- Provide a place to store documents
- Act as contact or representative payee, if possible/appropriate
- Follow up to ensure maintaining benefits



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# COMMUNITY RESOURCES



# TIPS & TRICKS: MAKING LINKAGES TO MAINSTREAM & COMMUNITY RESOURCES

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- Develop list of resources for different household types, continue to add new resources developed through work with clients, & identify resource gaps
- Assess eligibility & barriers to enrollment at initial intake/case management meeting
- Ensure veterans are connected to all applicable benefits
- Use online applications, whenever possible
- Provide transportation
- Build relationships with benefits offices, share success stories, etc.
- Invite eligibility workers for multiple programs to hold on-site sessions, monthly enrollment nights, drop in hours, etc.

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Step 1

Assessment of Housing Barriers & Strengths



Step 2

Goal Setting & Action Planning



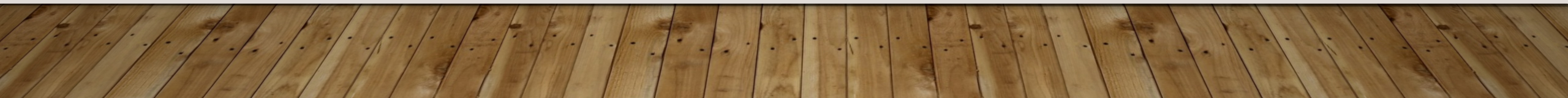
Step 3

Supporting Long-Term Housing Stability



Step 4

**Monitoring Progress & Follow-up**



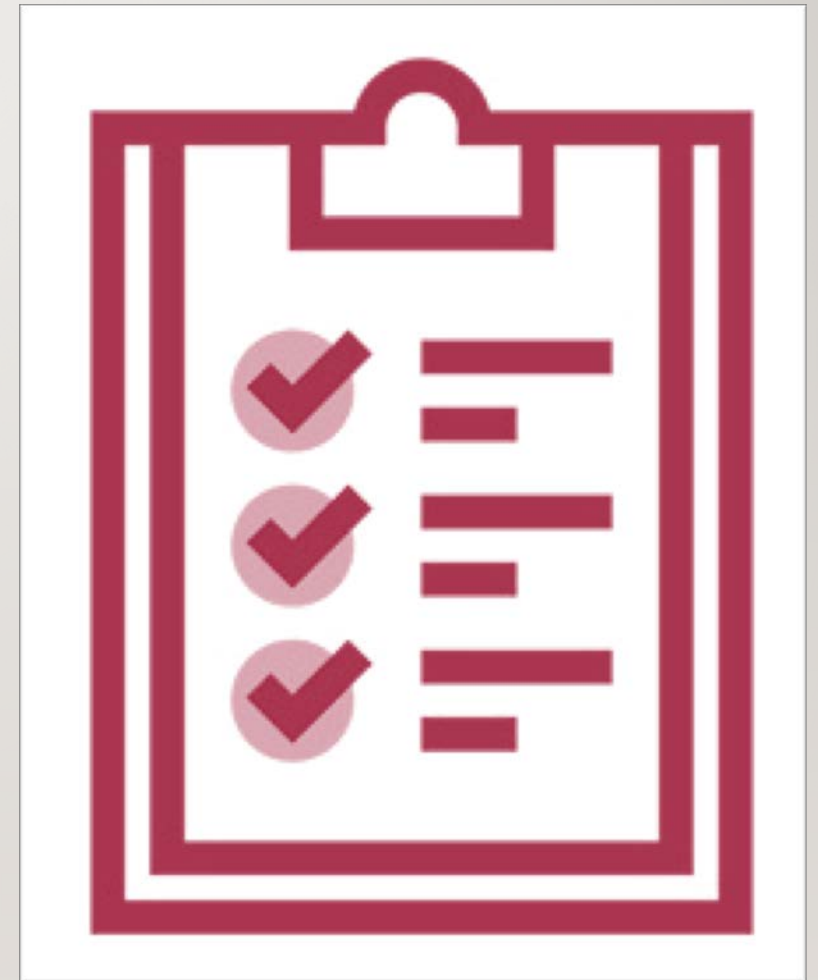
# STEP 4: MONITORING PROGRESS & FOLLOW-UP

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## CHECKLIST: MONITORING PROGRESS

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- Periodically review income, housing costs, & other expenses with client
- Review current circumstances/any changes with client
- Catch problems early on with home visits
- Maintain frequent contact with landlord after move-in
- Offer peer support groups
- Provide case manager "drop-in" hours, not just appointments



# REASSESSMENT – INDICATORS OF HOUSING STABILITY

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- Client is not in violation of lease
- Client does not owe back rent or other fees
- No (or very few) significant complaints from client, landlord, or neighbors
- Client can pay rent or has long term subsidy
- No material changes that would jeopardize housing
- Client is able to resolve challenges without program assistance
- Client is enrolled/is accessing community resources
- Client believes crisis has ended



# REASSESSMENT – INDICATORS OF HOUSING INSTABILITY

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- Lease violations
- Client owes rent or other fees
- Issues with/complaints from neighbors
- Issues raised by landlord to client or program
- Client is unable to pay rent and/or utilities
- Poor condition of unit on house visit
- Client is facing new challenge that could result in loss of housing
- Client has not enrolled/connected with community resources
- Client may lose mainstream benefit assistance
- Client sees need for additional housing assistance

# CHARACTERISTICS OF EFFECTIVE HOUSING STABILITY FOCUS

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- Support moving process – e.g., role-play the move, work with client to clean the unit at move in, facilitate introduction to the neighborhood & neighbors
- Work with client to identify top 2-3 potential challenges that may arise & troubleshoot in advance
- Schedule follow-up visit ASAP (ideally 2-3 days from move in)
- Provide ongoing case management in the home
- Focus on ongoing housing stability – continue conducting & modifying risk assessments
- Ensure there is a crisis plan in place

# ADAPTING THE PLAN

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Reassess & revise frequently – if significant changes & at least every 1-3 months, depending on progress

Focus is always housing stability but can change from obtaining to maintaining & long-term goals

Referrals & supports should be tailored & should change over time with progress or change of circumstances

Once housed, create an action plan in case housing crisis recurs

If client loses housing, re-housing is first priority – sometimes it takes "housing first, second, & third" before it works!

# TIPS & TRICKS: COMMON CHALLENGES TO HOUSING STABILITY PLANNING

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- Role confusion – who is doing what?
- Juggling hats – case manager plays so many roles!
- Disengaged clients – when housing is not their top priority
- Tracking/analyzing outcomes – so many clients, so little time
- Forgetting to celebrate successes – always more work to do

# RESOURCES

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- National Alliance to End Homelessness – Rapid Rehousing Toolkit  
[https://endhomelessness.org/wp-content/uploads/2016/10/NAEH-Rapid-RehousingToolkit\\_2017-FINAL.pdf](https://endhomelessness.org/wp-content/uploads/2016/10/NAEH-Rapid-RehousingToolkit_2017-FINAL.pdf)
- King County (WA) - Creating a Housing Stability Plan with Families Residing in Shelters & Transitional Housing [http://allhomekc.org/wp-content/uploads/2015/09/Housing\\_Stability\\_Assessment\\_and\\_Plan.pdf](http://allhomekc.org/wp-content/uploads/2015/09/Housing_Stability_Assessment_and_Plan.pdf)

# QUESTIONS

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