

Introduction to the Housing Mobility Toolkit

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Welcome

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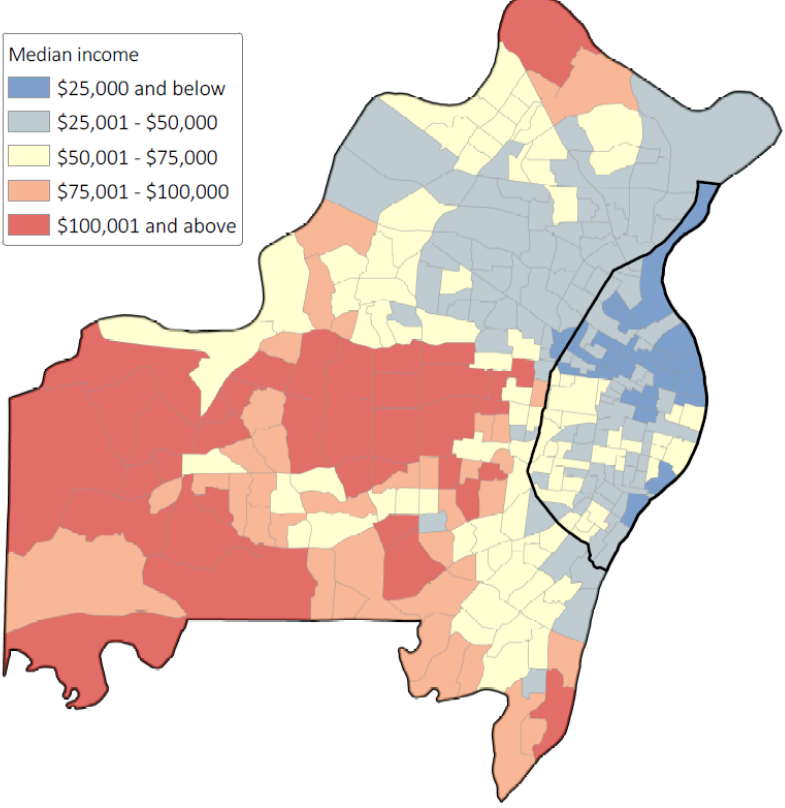
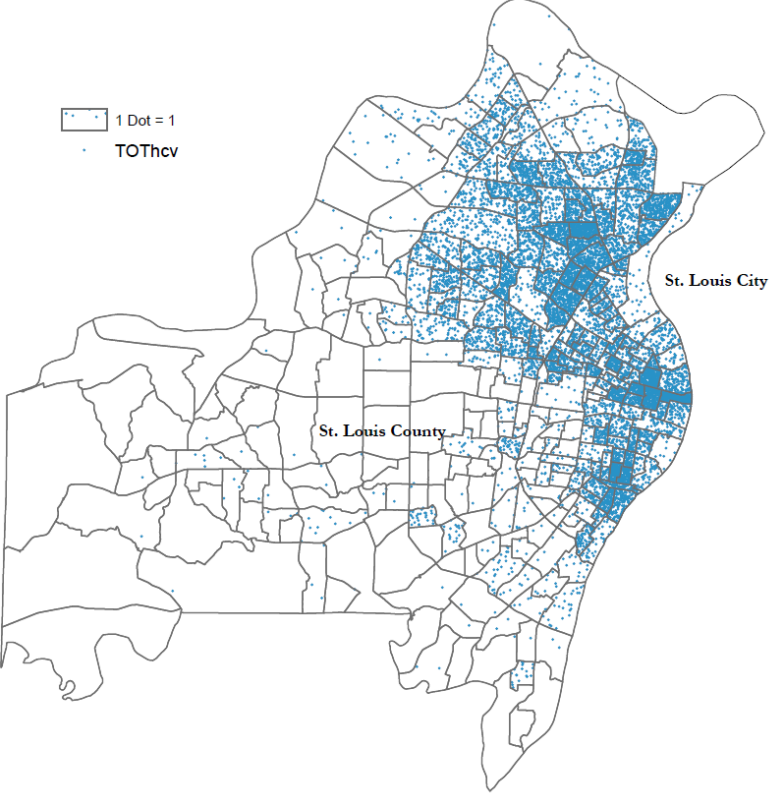


Introduction to Housing Mobility Programs

- Combination of administrative policies, client services, financial assistance, and owner outreach activities aimed at helping Housing Choice Voucher (HCV) holders move into and maintain residency in Opportunity Areas
- Assist low-income families, subsidized by HCVs, to live in middle- and high-income communities and benefit from the community's resources
- Housing Mobility Programs fulfill a variety of goals:
 - Racial and economic integration
 - Social mobility and health benefits
 - Reducing harms associated with living in high-poverty communities
 - Affirmatively furthering Fair Housing



Introduction to Housing Mobility Programs: St. Louis



Housing Mobility Toolkit Origins

- Adapted from materials developed for the Community Choice Demonstration (CCD)
- Program model initially developed by FirstPic, HUD, and Abt Associates with feedback from CCD sites
- Built on research, best practices, and several theories of human behavior
 - Systems Theory
 - Social Constructionist Theory
 - Humanism



Toolkit Audience

- PHA(s) and their service providers in order to develop their own Housing Mobility Program
- Requires participation by PHAs in order to make administrative/process updates to improve chances of families leasing in Opportunity Areas
- Significant customization required to put toolkit contents into practice

Toolkit Contents

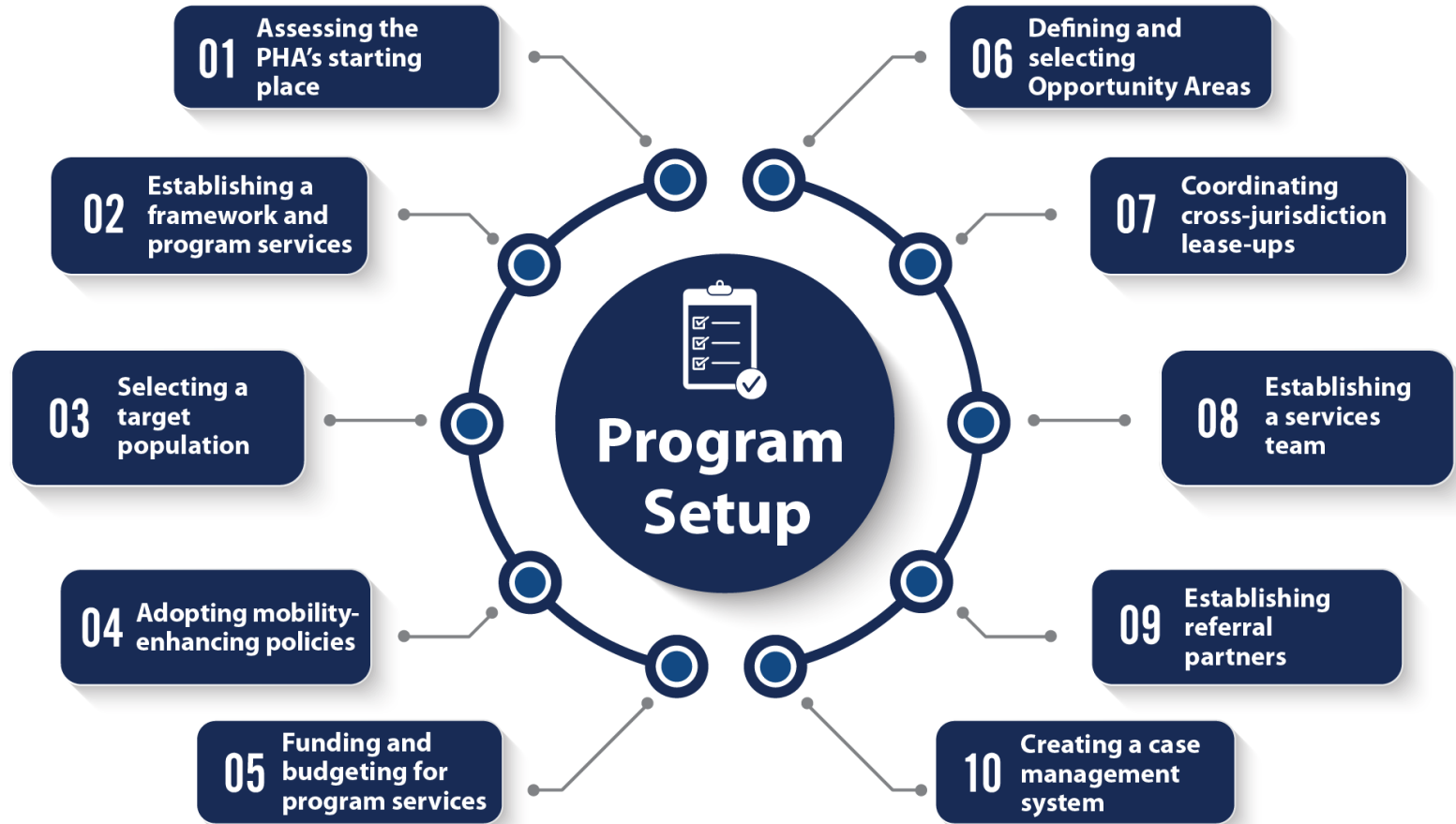
- Program Setup
- Program Setup Attachments
- Program Manual
- Program Manual Attachments
- Housing Search Workshop Materials
- Renter's Workshop Materials
- Money Management Workshop Materials





Program Setup and Program Setup Attachments

Program Setup



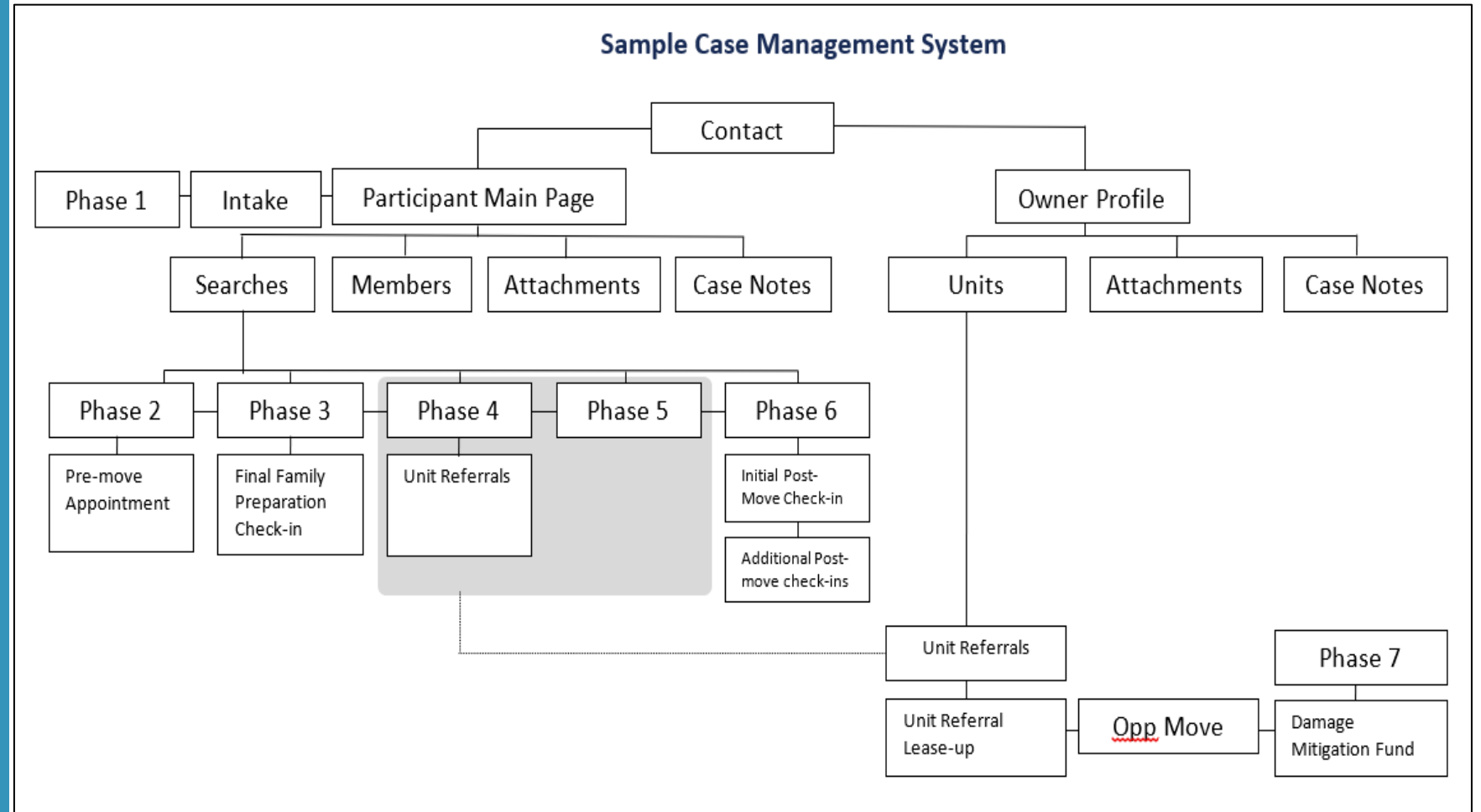
Program Setup Attachments

- Updating Housing Mobility Toolkit Materials
- Enrollment and Caseload Estimator
- Sample First Year Annual Budget
- Sample Materials for Program staffing
- Sample Case Management System Data Collection

Enrollment And Caseload Estimator

Enrollment and Caseload Estimator											
Instructions: Update the cells in blue and the cells in green will update automatically. See the Mobility Toolkit: Program Setup document for additional context.											
Take up and Attrition Assumptions											
Invitation to Enrollment	Enrollment to Pre-Move Appt	Family Prep to Searching	Searching to Lease up	Lease up to post-move	Phase 7 Clients Requesting Another Pre-Move appt						
20.0%	97.0%	88.0%	31.0%	97.0%	10.0%						
Program Month	L-6 Invite	L-5 Phase 1: Enrollment	L-4 Phase 2: Pre-move appt	L-3 Phase 3: Family Prep	L-2 Phase 4: Searching & Apps	L-1 Phase 5: Leasing up	L+1 Phase 6: Post-Move	Phase 7: Completed Search	Coach Caseloads	Leasing Coordinator Caseloads	Move Rate
1	85								0.0	0.0	
2	85	17.0							0.0	0.0	0.00%
3	85	17.0	16.5						16.5	0.0	0.00%
4	85	17.0	16.5	16.5				0.5	33.0	0.0	0.00%
5	85	17.0	16.5	16.5	14.5			2.5	47.5	14.5	0.00%
6	85	17.0	16.5	16.5	14.5	4.5		12.5	52.0	14.5	0.00%
7	85	17.0	16.5	16.5	14.5	4.5	4.4	12.6	56.4	14.5	34.53%
8	85	17.0	16.5	16.5	14.5	4.5	4.4	17.0	56.4	14.5	34.53%
9	85	17.0	16.5	16.5	14.5	4.5	4.4	21.4	56.4	14.5	34.53%
10	85	17.0	16.5	16.5	14.5	4.5	4.4	25.7	56.4	14.5	34.53%
11	85	17.0	16.5	16.5	14.5	4.5	4.4	30.1	56.4	14.5	34.53%

Sample Case Management System Data Collection



Sample Case Management System Data Collection

Construct	Data Type	Additional Notes
Housing Needs		
How to maintain neighborhood/housing likes	Text	
How to overcome neighborhood/housing dislikes	Text	
Additional considerations for housing	Picklist: accessibility; public transportation; pets; other	
If “other” additional considerations <u>is</u> selected	Text	Explanation for “other” category selected in the picklist from the construct above.
Specific needs about the unit	Text	



Program Manual and Program Manual Attachments

Program Manual

- Step-by-step guide describing best practices and emerging practices for staff to provide mobility-related services.
- Provided as a Word document for program creators to adapt to their own programs.
- Describes program services in a 7-phased system, from enrolling into the program, to closing a family's search and receiving additional move services.
- Each activity includes the goals of the activity, action steps to take, who does the activity, reference materials, and rationale for why the activity should take place and how it is set up.

Program Manual

Phase 2: Pre-move Appointment

Summary: The pre-move appointment is the primary opportunity for families to meet with the Coach to get to know the family. There are a variety of ways to schedule the appointment, but the pre-move appointment is designed to help the family understand the program, consider Opportunity Areas, and discuss how they will successfully move into an Opportunity Area. The pre-move appointment is recommended to be the only required phase in the program for participating families.

Timeline: The pre-move appointment is the first activity a client participates in during the program. The appointment should take place in one or two appointments. Coaches should aim to progress through each activity during the course of the appointment. If a meeting runs longer than 1.5 hours, the client needs to be rescheduled, or if rescheduled, the topic areas can take place across two meetings.

Key parties: Coach

Activities:

- Scheduling and Appointment Preparation
- Intake and Introduction
- Mapping Family Systems
- Opportunity Area Discussion
- Housing Needs
- Barriers to Moving
- Family Preparation Plan

Associated documents:

- Client Binder
- Mapping Family Systems worksheet (Attached)
- Sample Financial Coaching Referral Email (Attached)
- Affordability Calculator (Attached)

Scheduling and Appointment Preparation

Steps:

1. Establish an appointment with families who have signaled an interest in participating in the program.
 - a. This will vary depending on how the PHA chooses to set up Phase 1 of the program. For example, if the family attended a group enrollment presentation, then they would have already signed up for a pre-move appointment.
 - b. If there is no prior engagement with the family, then interested families may just call in to the program, be screened for any applicable eligibility, and then have their appointment scheduled.
2. Send text message and email reminders the evening before or the day of the appointment to help ensure the client will arrive to the appointment on time. Phone call reminders may also be used.
 - a. If the client is unable to attend the initial pre-move appointment, the Coach should at a minimum reschedule pre-move appointments three times with clients who are unable to make their initial appointment.
3. Gather information already available through the PHA's case management system if using a separate case management system.
 - a. Members and DOBs; current address; primary caseworker at the PHA; adjusted income; voucher size and expiration date; end of lease date.
4. After receiving authorization to do so by the client, using the soft credit system established by the PHA, pull the client's credit report and score.

Goals:

- Clients arrive to appointment on time
- Prepare documents ahead of client's arrival

Performed by:

Coach

Required materials:

- HCV line of business software
- Credit reporting system
- Client Binder (all materials)

Program Phases

Phase 1: Recruitment & Enrollment	Phase 2: Pre-move appointment	Phase 3: Family preparation	Phase 4: Owner outreach, searching & applications	Phase 5: Leasing-up	Phase 6: Post-move check-ins	Phase 7: Completed search
<ul style="list-style-type: none"> • Recruiting families coming off the waiting list • Outreach and inquiry management • Enrolling into the program 	<ul style="list-style-type: none"> • Scheduling and appointment prep • Intake and introduction • Mapping family systems • Opportunity Area Discussion • Housing needs • Barriers to moving • Family preparation plan 	<ul style="list-style-type: none"> • Workshops • Referrals to address barriers • Application cover letter • Ongoing check-ins • Final family preparation check-in 	<ul style="list-style-type: none"> • Requesting a move voucher • Proactive owner outreach • Maintaining an available unit list • Unit referrals • Unit tours • Ongoing check-ins • Submitting applications • Flexible financial assistance 	<ul style="list-style-type: none"> • RFTA filing assistance • Fast Inspections • Holding Fee • Owner lease-up bonus • Security deposit assistance 	<ul style="list-style-type: none"> • Client 1-month post-move check-in • Owner 1-month post-move check-in • Additional post-move check-ins 	<ul style="list-style-type: none"> • Annual check-in • “Open Door” check-in • Damage mitigation fund



Program Manual Attachments

- Client Binder
- Client Binder Example
- Introduction to the Housing Mobility Program
- Introduction to the Housing Mobility Program Facilitator Guide
- Sample Outreach and Enrollment Calendar
- Sample Current Voucher Holder Outreach Letter
- Sample Outreach Email Response Script
- Sample Phone Call Script
- Sample Webpages
- Sample Owner Brochure
- Sample Participant Brochure
- Sample Address Locator Tool
- Sample Affordability Calculator
- Sample Administration Calendar
- Sample Financial Coaching Referral Email
- Sample Post-Move Assessment
- Sample Damage Mitigation Fund Application

Client Binder

- Loose-leaf, participant-facing materials for the program
- Organized by program phase
- Contents include:
 - Program expectations
 - Overview of services
 - Maps and neighborhood descriptions
 - Credit profile overview
 - Information for referral partners
 - Family preparation plan
 - Information on how to search for homes and affordability
 - Application cover letter exercise
 - Overview of available financial assistance and reimbursement request form
 - Illegal discrimination in the rental market
 - Welcome Packet and FAQ for post-move environment
- Client binder example: “completed” version of the binder

Sample Post-Move Assessment

- Assessment tool used to:
 - Determine whether the client is experiencing any unmet needs or issues
 - Gauge client's potential need for additional follow-up
 - Determine what type of follow-up is needed (if any)
- Aims to reduce inter-staff reliability issues
 - Determines grade of unmet issues or needs
 - Offers specific examples of needs/issues by grade

Example from Sample Post- Move Assessment

Have you had any maintenance issues since you moved in? If so, were those addressed?

Request additional information for any issues or unmet needs described:

Grade of unmet need/issue	Client responses
No unmet need/issue	<ul style="list-style-type: none">• No maintenance issues• There is an issue but the client feels the owner is dealing with the issue appropriately
Low	<ul style="list-style-type: none">• The client complains that an owner has not resolved a maintenance issue• Property owner has not responded to a maintenance issue despite the client's best efforts to appropriately contact the owner to make the repair and the client feels frustrated
Medium	<ul style="list-style-type: none">• Property owner has not responded to a maintenance issue despite the client's best efforts to appropriately contact the owner to make the repair and the client feels frustrated
High	<ul style="list-style-type: none">• The client identifies an emergency maintenance issue• The client identifies a maintenance issue that has frustrated them so much they think the house is the wrong fit for them

Sample Affordability Calculator

- Excel calculator that staff can use to calculate what the family can afford in contract rent based on their voucher size, income, payment standard area, and estimated utility allowances



Workshops

Housing Mobility Toolkit Workshops

- Workshops families may choose to participate in, particularly ahead of starting their housing search during Phase 3 Family Preparation
- Housing Search Workshop: Recommended for every participant in the program
- Renter's Workshop: Recommended for participants that have had challenges with maintaining good relationships with property owners in the past, or who are currently having an issue with a property owner
- Money Management Workshop: Recommended for families who report having challenges with maintaining household bills or want to improve their credit profile

Housing Search Workshop

- Choosing between different types of units
- Affordability
- How to use the PHA's Address Locator Tool
- Checking out new neighborhoods
- Using online search engines
- Reaching out to property owners
- Making a great first impression

Renter's Workshop

- Moving-in procedures
- Reading a lease
- Paying rent
- Living in a house versus an apartment or townhouse
- Basics on property owner-tenant law
- How to turn on utilities and what to expect to pay during different seasons
- What to do when you have a maintenance issue
- What to expect when we inspect
- Moving-out procedures with the PHA and your property owner

Money Management Workshop

- Applications and credit history
- Costs of moving and furnishing a home
- Paying rent on time
- Paying utilities



Closing

Additional Webinars on Housing Mobility Toolkit

- Program Overview
- Program Setup
- Program Framework
- Updating Program Materials

Stay Informed

- HUD's webpage on Housing Mobility:
https://www.hud.gov/program_offices/public_indian_housing/programs/hcv/housingmobility
- HUD's webpage on HCV Trainings:
https://www.hud.gov/program_offices/public_indian_housing/programs/hcv/program_trainings_and_resources
- Sign up for the HCV Connect Newsletter:
<https://public.govdelivery.com/accounts/USHUDPIH/signup/28268>



Questions?

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