Progressive Engagement Approaches

Technical Assistance Collaborative

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Agenda

- Introductions/Welcome

- Progressive Engagement Tips & Discussion

- Close Out: One thing you heard or thought of today you may try

Who is here? In the chat...

- Name

- Organization & Role

- Icebreaker: Describe your week in a weather term (i.e. sunny w/a chance of clouds, etc.)

Webinar Format

- Interactive, foster discussion and group learning

- Success = building relationships to lean on in the future

- Join us on camera!

- Safe venue to share challenges

Poll: RRH Financial Assistance

How experienced are you with using a progressive engagement approach for your financial assistance?

1- No experience, this is all new!

2- Some experience

3- Very experienced

Background

A Progressive Approach

- Programs never impose a standard assistance package on all participants

- Clients are first offered the least amount of assistance (financial and service) needed to end their homelessness, today

- Support is scaled up, or down, based on individual household needs

- Assume most can be successful with fairly limited assistance

- Use flexibility of funding sources to tailor services
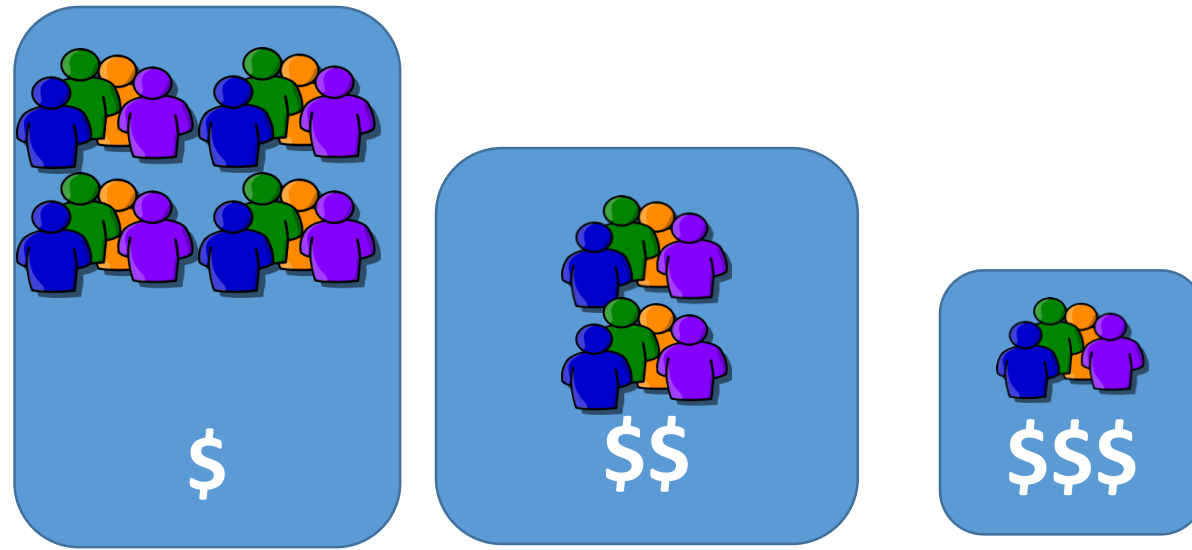
Progressive Engagement/Assistance

A Different Way of Thinking About Assistance

- Previously: Advocate to get your client as much $$ as possible

- Progressive Engagement/Assistance
  - Lightest Touch Possible
  - You can always add more

Progressive ASSISTANCE in Rapid Re-housing

Why is PE gaining steam?

1.) Research has shown that most people who use RRH do not return to literal homelessness in the first 1-2 years

2.) Research has shown that households can make RRH and other rent-burdened situations work

3.) So far, there are no indicators or assessment tools to predict who will/will not make RRH work

4.) There is not enough affordable housing, supportive housing, or even rapid re-housing to serve everyone who needs it, so how do we maximize the use of our limited resources?

Questions?

Operationalizing PE

First, a case scenario….

Daisy worked her way through an associate's degree while living in the shelter. Two weeks after starting to work with your program she found a job working as an administrative assistant at a local nonprofit where she makes $1300/month and identified and moved into a one-bedroom apartment at $900/month with utilities included (69% rent burden). Daisy is concerned because her position is funded by a grant that only lasts for 18 months. She is uncomfortable with her rent burden and thinks she could make more money if she went back to school. Her job does not provide comprehensive benefits and she is in need of health insurance. You have provided her with the information to apply for Medicaid but she has not done it yet and is unsure if she wants to access public benefits anymore.

Daisy has only received two of the 6 months of rental assistance she is eligible for. Is Daisy a good candidate to consider for closing or should you continue to provide financial assistance and services?

Poll: Operationalizing PE

How would you approach Daisy's case, using your current program policies or procedures?

___ We do not have any policies that tell us markers for when a case should be closed or continued so I'm not sure.

___ We would help her recertify for more services and financial assistance because she has only used 6 months and is rent burdened (69%)

___ We would start to taper her financial assistance down, ensure she was receiving all possible public benefits, and begin the case closing process.

Progressive Engagement- Pitfalls

1.) Participant still has eligibility for financial assistance left

2.) Waiting for certain housing stability that is not defined or realistically achievable within RRH's scope

3.) Non-compliance or no progress toward goals

Shared Learning

What is a financial assistance practice you have implemented (even if it's on a small scale) that you are proud of?

Tips + Discussion

Operationalizing Progressive Engagement

1. Exit Planning from Day 1: Defining Housing Stability
2. Sample Rental Assistance Structures
3. Transparency in policies

Housing Stability- Defining Success

Operationalizing PE- Housing Stability

Exit Planning from Day 1

Housing Stability- Defined to Each Participant

Programs and/or systems will define what the term "housing stability" means so that staff have clear milestones and timelines to assess whether assistance (both services and financial assistance) may be tapered down to close a case, or increased in intensity for households who are not reaching "housing stability".

Defining Housing Stability

Below are sample primary indicators to define housing stability to participants from the beginning of program enrollment

1. Financial indicator that rent can be managed

2. Housing is in good standing (rent is paid and no lease violations)
    Program staff contact landlord to confirm

3. Connections to community supports, including all benefits

    Person has been connected and connection has been tested
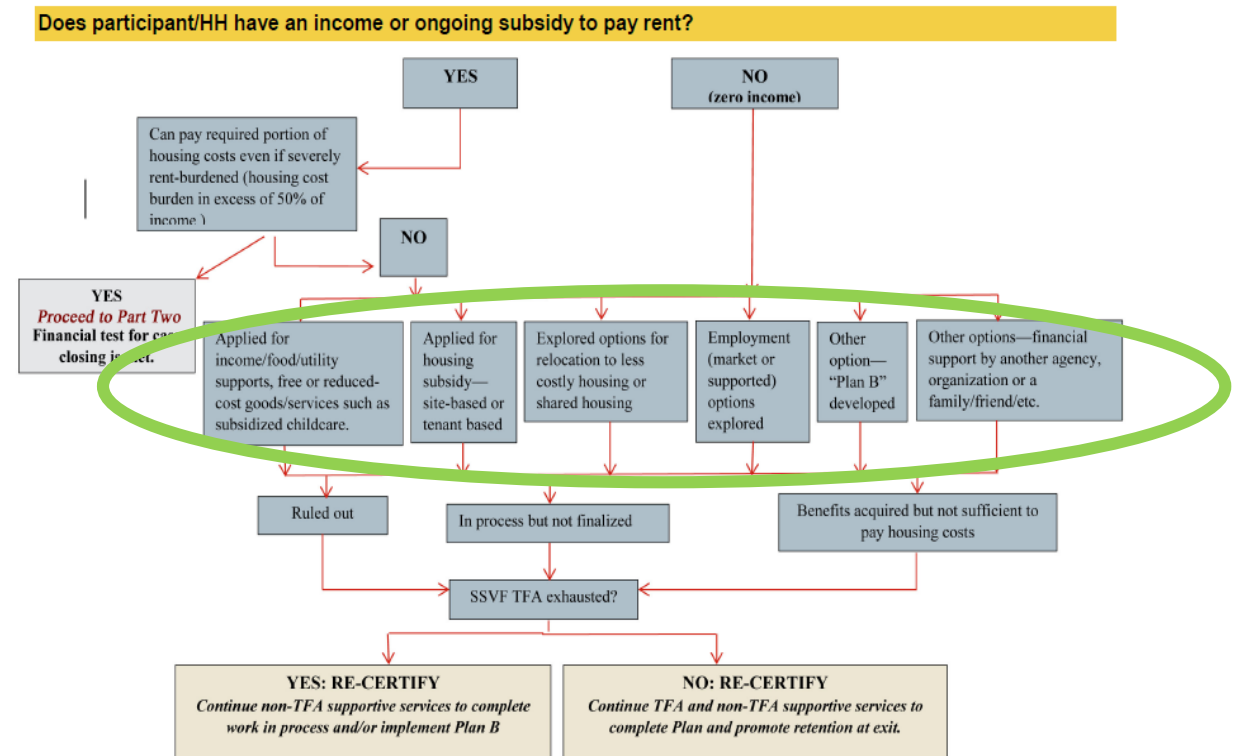
Housing Stability Plan- Tips

Plans should be limited in scope

- The focus of the plan is on <u>housing stability (as defined)</u>
  - Payment of rent
  - No lease violations
  - Ties to community-based supports, including all benefits

- People can choose when and if (and with whom) to address other life issues and goals… <u>later</u>… when they are safely and stably housed

Sample Case Close Flow Chart

If client cannot pay rent, key actions staff should pursue are outlined to maximize income:

- Income max
- Food (in kind and bens)
- Utility discounts
- Free/reduced costs
- Applied for all subz hsg
- Explore relocation options
- Form a Plan B
- Financial support from support network

Source: https://www.va.gov/HOMELESS/ssvf/docs/Training_Guide_Case_Recert_Closing_Flow_Chart_Final.pdf

Shared Learning

- What milestones does your program use to start exit planning? Or…

- How does your program define housing stability?

Shaping the $

Progressive Engagement- Sample Approaches

Sample approaches

- Specified rent burden or expenses ratio amount to close a case (ex. 60% and below is a marker to consider tapering financial assistance)

- Budget assessment every month to determine if any financial assistance is needed

- Standard upfront costs package (ex. 3 months assistance)- re-assessed for next increment

Progressive Engagement Sample Approaches

Sample approaches (continued)

- Rent percentage schedule for participant (as long as its flexible to change as needed)
  - Ex. Months 1-3 pay 40% of rent, months 4-6 pay 60% of rent, etc.

- Deep to shallow (ex. first 3 months deep to move up/out of homelessness; 21 months of very shallow assistance to make unit rent manageable)

- Home-grown stability assessments
  - Ex. Salt Lake City RRH Stability Conversation Guide
  - Factors such as current rental debt, utility debt, current income, lease violations

Spotlight

Cincinnati Progressive Engagement Approach

Lightest Touch Philosophy: The Right Intervention at the Right Time.

- Views Family, Friends, Supportive Services and Peer Networks as Permanent Resources that will last after case management ends

- Enquires about and Enlists these networks.

- Views participants as an expert in their own lives and meets them where they are.

- Time spent upfront saves time down the road.

Determining Initial Rental Assistance

Circle which income best describes client's situation:	No Income	Inadequate income and/or spontaneous or inappropriate spending	Can meet basic needs with subsidy; appropriate spending	Can meet basic needs and manage debt without assistance	Income is sufficient, well managed; has discretionary income and is able to save
Responsible to pay towards rent:	$50	30% of rent	60% of rent	75% of rent	100% of rent
Complete and circle the percentage of rent the client is responsible for (please show percentages in each box):					
KEYS will pay the following portion of rent to the landlord:					

(Example: If the total rent is $550, 30% of $550 = $165 or 60% of $550 = $330)

Shared Learning

How does your program shape financial assistance?

Transparent Policies

Transparency in Decision-Making

Written policies and procedures (including the definition of housing stability) are available to staff and participants and should include:

How often do you assess cases for more/less assistance?

Who is involved in the decision-making and how is it communicated to the participant?

What are they key indicators you use to make the decision (i.e. your definitions)?

Sample PE Policy in Action- Baltimore Program

- The team meets weekly for 2 hours to discuss families and to brainstorm creative opportunities to engage families and address barriers to housing stability • The family and the case manager review the housing stability plan monthly and the case manager prepares, in writing, and presents each family for an Administrative Review • Administrative Reviews include the Assistant Director, the Senior Director for Shelters and Rapid Re-Housing, and the Sr. VP of Program Services for SVDP • The case manager is responsible for meeting with the family after the meeting and discussing the next month(s) rental assistance • The family and the case manager sign a new housing stability plan that outlines the rental assistance amount, duration and goals to reach housing stability.

Sample PE Policy in Action- Baltimore Program

Strengths of the Policy

- Team case conferencing to brainstorm solutions to housing instability
- Supervisory involvement in decision so burden of decision is not on one staff member; also promotes program consistency
- Defined frequency of housing stability plan review (monthly)
- Policy, decision and new plan are given to the client for transparency

Shared Learning

What policies do you use to implement progressive engagement?

Another Scenario

Joyce moved in to housing last month after a lengthy six month search. She suffers from PTSD after a significant traumatic experience while serving in the Army. You assisted her with applying for a service-connected disability and she is now receiving just over $1800/month to support herself and her 6-year-old son. Joyce's previous eviction and poor credit made locating suitable housing difficult, but you were able to work with a landlord sympathetic to the program to work around the screening barriers. Unfortunately, Joyce has refused to pay her initial portion of the shared rent this month (total rent is $900, she is expected to pay half while in the program) and several neighbors have complained to the landlord about the volume at which she watches TV in the house. You have encouraged Joyce to seek out counseling services through the VA to address her PTSD, but she has not gone. How would you move forward with Joyce?

Poll: Operationalizing PE

How would you approach Joyce's case, using the three part housing stability definition (1.) rent burden threshold, 2.) paying rent/no lease violations and 3.) tested connection to community-based supports)?

___ Joyce's rent burden percentage is manageable; end financial assistance and provide tapering, light touch services for 1-3 months.

___ Joyce is only passing 1 out of 3 parts of the housing stability definition (50% rent burden); increase intensity of services; extend housing stability plan/RRH assistance for three months; set goals related to nonpayment of rent, lease violations, and possibly transitioning to a more supported housing unit.

___ Provide Joyce with a multi-year bridge RRH subsidy to VASH or PSH

Group Share

What is one thing you heard today or thought about to try in your own program?