



# Permanent Supportive Housing NAIHC Virtual Training

Wednesday, September 2, 2020  
10:00a.m. – 3:00p.m. MST

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This virtual training is sponsored by the  
U.S. Department of Housing & Urban Development's Office of Native American Programs and the  
National American Indian Housing Council



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## TODAY'S AGENDA

### *Services in Supportive Housing (10am – 12pm MST)*

- Reflections from yesterday
- Examples of Services, Staffing and Best Practices
- Funding Services in Supportive Housing
- Roles of Services Staff
- Relationship with Property Manager
- Break for 1 hour

### *Property Management and Service Staff (1pm – 3pm MST)*

- How property management differs in PSH
- Financing Operations in Supportive Housing (housing choice vouchers, VASH, NAHASDA, etc.)
- Roles of Property Manager
- Relationship with Service Providers
- Development Team Implementation Plan
- Questions and Discussion

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## Reflections from 1<sup>st</sup> Training Day

**Any Ah-Ha moments?**

**Outstanding questions?**

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## Services: All Systems Considered



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## Service Approach (Review)



- **Targeted** based on populations served
- **Flexible** in responding to comprehensive resident needs
- **Voluntary** with participation not being a condition of residency
- **Independent** focus specifically on housing stability

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## Service Types (not limited to . . .)

- Counseling
- Health and mental health services
- Alcohol and substance use services
- Independent living skills
- Money management / Budgeting
- Community-building activities
- Vocational counseling and job placement

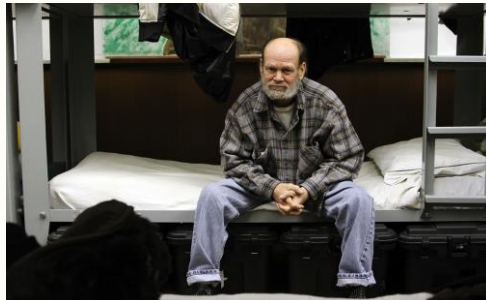


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## Tenant Centered Services

- Offer meaningful choice
- Input from tenants used to design services options
- Services designed to meet likely needs of tenancy
- Culturally relevant and appropriate services
- Services “start where tenants are at”

**Support is offered from initial engagement and continues after move-in – Ideally by the same person or group to help foster rapport and establish a professional helping relationship**



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## Examples of Staff

- Residential Counselors Day & Night
- Front Desk Manager & Staff
- Nurse Practitioners, RNs
- Psychiatrists
- Care Managers
- Therapists
- Mentors
- Peer Specialists
- Leasing Assistant
- Maintenance Technician
- Regional Property Manager
- Program Manager



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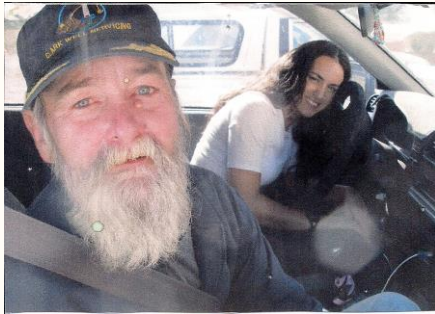
## Best Practices: Supportive Services



- Monthly Staff Meetings; include a training piece at each meeting (either from the manual or general, i.e. hoarding)
- Bi-Weekly Case management meetings
- Great Conversations with clients
- Harm reduction methods with clients
- Annual Staff Retreats
- Open-door policy with staff
- Increased case management at move-in and rough times
- Work in teams
- Constant contact with news outlets

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## Developing your Supportive Services Plan and Budget



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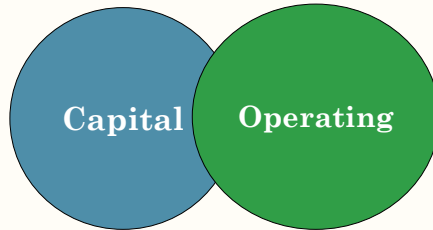
## Questions to Consider

- What are your current funding sources and how do they fit with supportive housing? Anticipated challenges?
- What new sources are you planning to target for supportive housing service funding?
- What services do you need to provide but are unsure of funding availability?
- Support staff / case manager ratio and appropriate rate of pay?

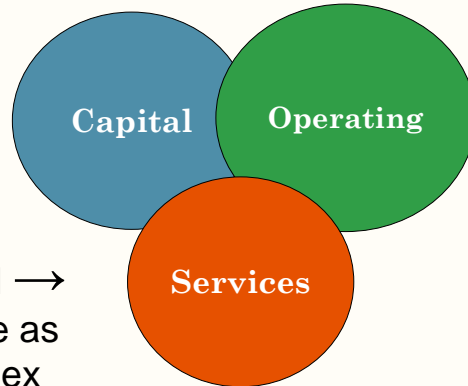
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## Financing Supportive Housing

### Traditional Affordable Housing



### Supportive Housing



The most difficult and →  
least stable to finance as  
residents have complex  
needs

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## Service Budgeting Basics

- Services Budget is separate from Project/Development budget and separate from Operations budget
- Most Funding sources will require clear separation of these three budgets
- Projected expenses should match projected revenues
- The service plan will inform the service budget



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## Service Budgeting Basics

- Services Plan reflects goals of housing and includes your budget assumptions:
  - What is your tenant to staff ratio?
    - Is this reasonable in terms of service provision? In terms of cost?
    - What services will be offered on site vs. in the community?
  - What types of client service costs do we include? (i.e. transportation)

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## Sample Supportive Services Plan and Budget

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## Sample Services Budget – 30 units

<b>Services Staffing</b>			
<b>Job Functions</b>	<b>Job Titles</b>	<b>% FTE</b>	<b>Annual Cost</b>
Overall management/coordination	Program Director	25.00%	\$13,750
Case management	Resident Services Coordinator	1.50%	\$60,000
Peer Support	Peer Navigator/Support	1.00%	\$36,000
Front desk staff	Front Welcome Desk	3.00%	\$75,000
Other: describe			
Subtotals, Personnel Costs			\$184,750
Fringe Benefits			\$36,950
Subtotal, Personnel Costs			\$221,700
<b>Other Services Program Costs</b>			<b>Annual Cost</b>
Client financial assistance			\$20,000
Client transportation			\$20,000
Food/refreshments for client events			\$10,000
Other: Supplies for community activities			\$3,000
Other: Stipends for professional services (art therapy)			\$6,500
Other: describe			
Other: describe			
Subtotal, Other Program Costs			\$59,500

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## Sample Services Budget Cont.

<b>Other Direct Services Costs and Indirect Overhead Services Costs (prorate for this project)</b>	<b>Annual Cost</b>
Office rent	
Utilities - electricity, heating fuel, phone, internet	
Equipment and equipment maintenance	\$1,000
Office supplies and postage	
Mileage and parking (staff)	\$1,000
Training and development	\$3,000
Insurance (not including insurance within employee benefits)	
Accounting	\$1,000
Audit	\$1,000
Legal	\$1,000
Other: describe	
Other: describe	
Other: describe	
Subtotal, Other Costs	\$8,000
<b>Total Annual Services Budget</b>	<b>\$289,200</b>

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# Sample Sources

Sources	Year 1	Year 2	Year 3	Year 4	Year 5
<b>Inflation rate: 3%</b>	<b>289,200</b>	<b>\$297,876</b>	<b>\$306,812</b>	<b>\$316,017</b>	<b>\$325,497</b>
% of Developer's Fee	\$50,000.00	\$50,000.00	\$50,000.00	\$50,000.00	\$50,000.00
Cash Flow	\$25,000.00	\$27,000.00	\$29,000.00	\$31,000.00	\$33,000.00
Medicaid	\$80,000.00	\$90,000.00	\$100,000.00	\$110,000.00	\$120,000.00
IHBG/CoC/Admini- stration of Native American SED Grant, Other funding sources	\$134,200.00	\$130,876.00	\$127,812.28	\$125,016.65	\$122,497.15
<b>Total Annual Sources Forecast</b>	<b>\$289,200.00</b>	<b>\$297,876.00</b>	<b>\$306,812.28</b>	<b>\$316,016.65</b>	<b>\$325,497.15</b>

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## Service Staff Roles



- Responding to crisis
- Assistance with budgeting, paying rent
- Access to employment
- Tenant involvement
- Medication monitoring and management
- Medical and health services
- Children's services
- Counseling and support in achieving self-identified goals
- Assistance in meeting lease obligations and complying with house rules
- Referrals to other services or programs
- Conflict-resolution training
- Coordination with Property Management

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## Property Management Roles



- Tenant lease qualification review and household rent calculation
- Reasonable Accommodation
- Tenant file maintenance and record keeping
- Lease enforcement, rent collection, late rent letters and eviction process
- Guidelines for rent collection including coordination with support services

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## Property Management Roles



- Responding to crisis
- Coordination with support services
- Incident report documentation and follow-up
- Supervising property
- Management and maintenance staff
- Managing the 'next available unit' process
- Reporting to owners and other funding partners
- Financial management and payment of operating expenses
- Communicating with neighbors and community

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## Areas of Overlap

- Intake: Tenant Selection and Interviewing
- Orientation of New Tenants
- Rent Payment and Arrears
- Dealing with Disruptive Behaviors
- Responding to Crisis / Procedures in Crisis
- Tenant Grievance Procedures
- Tenant Council
- Community Building
- Neighborhood Outreach and Communications

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Property Management and Services Working Together

**Goal:** Keep people housed while protecting the financial and physical well being of tenants, the community, and the building.

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## Best Practices for Services and PM Working Together

Everyone should know the basic program outcomes and indicators

- Housing outcomes
- Other service outcomes
- From the three below identify the priority for the complex:
  - Financial
  - Services
  - Property



(HINT: All are the priority! 😊 )

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## Embracing Good Tension

- Respect different roles of each partner
- Understand all roles are necessary and important for a well-managed building
- Acknowledge and use built-in tension between roles and functions to ensure stability and a sound asset
- If you do not have some tension someone is not doing their job!



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## Stressors

- Different values/views on lease violations
  - Housekeeping
  - Behavior
  - Drug use
  - Alcohol use
  - Household supervision
  - Overnight guests / visitors
  - Evictions
- Maintenance
- Unit turn over

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## Strategies to Improving Housing Outcomes

- Housing plans
- Good communication
- Keeping perspective / Don't take things personally
- Incentives
- Creating reasonable rules
  - No late fees
  - Choices instead of "must do's"
- Laughing and having some fun!

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## Great Relationships

How do we measure the success of our relationship

- Are we communicating?
- Are we operating within the fiscal goals of the property?
- Are we in compliance with program funders?
- Are we housing people?
- Are we having successful outcomes?

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## Communication Plan

- Clear lines of authority and decision making in situations of disagreement
- Policies and Procedures are updated and understood
- Staff communicates at the right time and in the right way
- Information flow is prompt and protects tenants
- Actions are documented
- To do lists and who's responsible at each meeting



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## Principles into Practice

- Develop a mechanism to involve front-line staff when crafting policies and procedures
- Have a written procedure for resolving disagreements
- Make sure agency policies are in active use
- Look for client/tenant impact as you evaluate procedures



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## Coordinating Roles

- Maintaining good, regular, “institutionalized” communication
- Shared focus on housing stability
- Understanding and appreciating each partners’ roles
- Shared understanding of tenants’ needs
- Creating and implementing policies that meet needs of tenants
- Accountability
- Confidentiality



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## Break for Lunch

See you back here at 1pm MST

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## Property Management in Supportive Housing



In supportive housing, long-term success of buildings and the communities in which they exist, require a level of comprehensive practices above and beyond conventional property management functions.

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## Property Management in Supportive Housing



- These extra dimensions respond to tenant needs as they relate to fundamental tasks
- Important in all stages of development
- Property management staff should have input about what gets built, how the project will be run, and an understanding of the services to be provided

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## Affordable Housing Property Management

- Management company makes all decisions regarding tenant leasing and compliance with affordability requirements, monitoring lease compliance, assessing violations and conducting evictions.
- Management company manages vacancy rate, rent collection, bill payment, providing financial and property condition reports to stakeholders, etc.
- Management company works with residents to make payment plans.



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## Supportive Housing Property Management

- Collaboration between property manager and service providers regarding lease violations and evictions.
- Regularly scheduled meetings between lead service providers and property management staff to go over rent rolls, impending issues, etc.
- Working together to come up with creative solutions for keeping people housed and the buildings feasible.
- Service providers involved with payment plans, and housing retention plans.
- Property management company “screens people in” rather than screening them out

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## Tenant Selection Criteria/Plan

### Develop a TSP

- Road map select target population
- Don't want to make changes often
- Clarifies roles and responsibilities in the selection process
- Clarifies who you will and will not rent to.
- Neutral tool

Supportive Services model must reflect needs of the target population



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## Important Property Management Principles

- Clear and objective written communication
- Professional communication & attitude during the decision-making process
- Professional boundaries with residents – no “favors”
- Keeping the lines of communication from breaking down, in good times and bad
- Providing detailed information to owners, service providers, lawyers, law enforcement, and others as necessary and approved



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## Important Property Management Principles

- It is your job to protect each tenant's right to privacy
- Protect tenants from information being disclosed which could potentially be used against them
- Encourage trusting relationships with and among residents
- Only share information that allows another person to do their job, AND there is a release of information signed by resident



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## Funding your Operations

How the heck do we pay for this??



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## Operating Budgets 101

- Income and Expenses
- Operating Subsidy/Operating Source
- Operating Sources - provide subsidies to cover the gap between the costs of operating the building (e.g., utilities, maintenance, etc.) and what the tenants can afford to pay in rent

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## Operating Budgets 101

- For a project to "pencil out" (have expenses equal income), a supportive housing project needs an ongoing source of funding to supplement tenant rents.
- Such funding streams are known as operating subsidies, rent subsidies, or rental assistance



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## Operating Budget Considerations

- Management Fee - % or per door fee
- Office Supplies & Expenses
- Legal – evictions, etc.
- Accounting - tax filings, audit, reporting to investors
- Staff / Payroll Costs
- Utilities

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## Operating Expenses

- Maintenance and Repair
- Administration
- Property Management
- Utilities
- Taxes and Insurance
- Contribution to Reserves: replacement and operating



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## Questions to Consider

- Does the budget include all of the revenue that the owner/sponsor can reasonably expect to collect as income?
- Does the budget include all of the costs that the owner/sponsor will incur to properly maintain and manage a successful project?

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## Other Questions to Consider

Is the budget accurate?

- What are the underlying assumptions in projecting the revenue and operating costs, and are they reasonable

Is it realistic over time?

- Does the budget address the continuing costs of operating the project, and have the revenue and expense assumptions been trended

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## Sample Operations Budget - Revenue

Rents (Annually)					
		# of Units			
1-bedroom rents			\$ 35,160.00	Laundry	\$ -
	\$586	5		Other Vending Income	\$ -
2-bedroom rents			\$ 91,200.00	HOA Fees	\$ -
	\$760	10		Late Charge	\$ -
3-bedroom rents			\$ 114,240.00	Other Income	\$ -0
	\$952	10			\$ -
4-bedroom rents			\$ 70,560.00	<b>Total revenues</b>	<b>295,602.00</b>
	\$1,176	5			
Gross Rents			311,160		
Budgeted vacancy		5%	(\$ 15,558.00)		
			\$ 295,602.00		

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## Sample Budget - Expenses

Management Fee	\$ 10,000.00		
Audit/Accounting	\$ 2,500.00		
Compliance	\$ -		
Legal	\$ 1,000.00		
Advertising	\$ 2,000.00		
Office Supplies	\$ 800.00		
Postage	\$ 1,200.00		
Telephone	\$ 1,830.00		
Elevator			
Maintenance Services	\$ 7,500.00		
Maint/cleaning Supplies	\$ 7,500.00	<b>Total Revenues:</b>	<b>\$295,602.00</b>
Paint And Decor - Interior	\$ 2,650.00	<b>Total Operating Expenses:</b>	<b>\$171,640.00</b>
Unit Turnover	\$ 6,250.00	<b>Surplus:</b>	<b>\$123,962.00</b>
Janitorial Supplies	\$ -		
Heating & Air Cond Repairs	\$ 2,500.00		
Exterminating	\$ 1,500.00		
Fire Protection/security	\$ 2,750.00		
Snow Removal	\$ 3,000.00		
On-Site Manager	\$ 30,000.00		
Maintenance Wages	\$ 15,000.00		
Insurance and Benefits			
Grounds Maintenance	\$ 6,000.00		
Electricity	\$ 25,500.00		
Natural Gas	\$ 4,200.00		
Water	\$ 3,150.00		
Sewer	\$ 6,900.00	<b>Total operating expenses:</b>	<b>\$171,640.00</b>
Garbage And Rubbish	\$ 4,500.00		
Taxes	\$ 8,600.00		
Insurance - Property And Liab	\$14,810.00		

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## Operating Subsidies

- Project Based Housing Choice Vouchers
- HUD-Continuum of Care PSH Vouchers
- IHBG/NAHASDA-as a project-based voucher or operating subsidy
- Housing Trust Fund
- Tribal HUD-VASH

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## Barriers to Vouchers in Indian Country

- NAHASDA prohibits tribes from receiving housing choice vouchers however non-tribal Housing Authorities can project base housing choice vouchers into tribal projects.
- VA MC (Medical Center) and PHA (Public Housing Authority) may be a distance away from tribal area.
- Veterans have to meet the definition of chronically homeless or homeless.

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## Unique Operating Costs in Supportive Housing

- Additional PM staff time to work with services providers
- Potentially more turn overs, warning and eviction letters
- Additional security needs
- Staff training time for harm reduction, mental illness, etc.



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## Lease Agreement

- Formalizes Rights and Responsibilities of both the Landlord and Tenant
- Legally Enforceable
- States clear expectations:
  - Rent payment
  - Income requirements
  - Security Deposit provisions
  - Unit entry
  - Proper care and use of unit



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## Let's discuss House Rules

- They should not duplicate what's already in the lease: rent payment, visitors, etc. - this makes the lease "weaker" and starts to make service providers responsible for property management functions
- They should not be illegal or unenforceable (i.e. no kids on the playground without an adult)
- Should not be reactionary, or make rules for the whole building in order to address an issue with one tenant (instead of directly addressing the issue with that tenant)
- Do you need a house rule or a housing retention plan?
- **Be aware of fair housing but know that you can be sued at any time for any reason**

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## If you must have Rules . . .

- Rules should mirror the philosophy and intent of the supportive housing community
- Each rule should have a clear purpose
- Rules should be specific, enforceable, and legal
- Have a mechanism for tenant input when house rules are written or revised: Let tenants initiate new house rules, giving them a sense of ownership
- Can be an effective way to deal with an "epidemic" of a certain issue, usually time specific
- Keep rules simple and not too many at one time

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## Non-Payment of Rent



- Respond to missed payments promptly
- Explore payment pledges or other creative solutions
- Issue written notices informing the tenant of delinquency
- Notify service provider: This is an opportunity to re-engage the tenant

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## Lease Violations

- Notices of lease violations should be in writing and provided to the tenant promptly
- Provide facts - avoid personal statements and opinions
- Clearly identify the lease provision or house rule that was violated
- State the consequences of violation and potential consequences of future violations
- Copies of all notices should be provided to support services



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## Housing Retention

- When is a housing retention conference appropriate?
- What is the goal and desired outcomes?
- Who should be there?
- Document any outcomes or agreements



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## Evictions

- Should be the last resort
- Costly – can take a long time and waste organizational resources
- Create other housing problems and can lead to long-term homelessness
- Problem-solving before eviction is preferable
- If you do need to “evict” a resident, the preference is to get people to sign voluntary termination/recision of lease forms



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## Reasons to Evict

- Non-payment of rent with no resolution
- Illegal behavior, including drug sales: on the property or to other tenants
- Violent behaviors toward staff
- Others?



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## Meth Detectors

- Global Meth Solutions  
<https://www.globalmethsolutions.com.au/shop>

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## Not Reasons for Eviction

- Messy apartment/lack of housekeeping skills
- Relapse or ongoing chemical use
- Non-compliance with mental health or other medications
- Yelling or swearing at staff after having a bad day
- Refusing to follow prescribed case plan or meet with staff
- Adding “abuser” to the lease

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## Final Question

Go to [www.menti.com](http://www.menti.com) and use the code **26 23 23 6**:

**(What would you have liked to have seen more of in this training?)**

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## Next Steps

- Technical Assistance Opportunities – contact your ONAP office
- Additional Trainings – check [www.NAIHC.net](http://www.NAIHC.net) for more information

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## Additional Resources

### 1. Videos:

- No Losers (New San Marco: Duluth, MN) <https://youtu.be/ETGd2EP4z70>
  - AICHO (Duluth, MN)  
[https://www.youtube.com/watch?v=bz2YjRXllzY&feature=emb\\_l](https://www.youtube.com/watch?v=bz2YjRXllzY&feature=emb_l)
- How Childhood Trauma affects health across a lifetime:  
<https://www.youtube.com/watch?v=95ovIJ3dsNk>
- Everything you think you know about Addiction is wrong:  
[https://www.ted.com/talks/johann\\_hari\\_everything\\_you\\_think\\_you\\_know\\_about\\_addiction\\_is\\_wrong?language=en](https://www.ted.com/talks/johann_hari_everything_you_think_you_know_about_addiction_is_wrong?language=en)

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