

## **Preparing to Launch FSS**

June 25th, 2020

#### Presenters:

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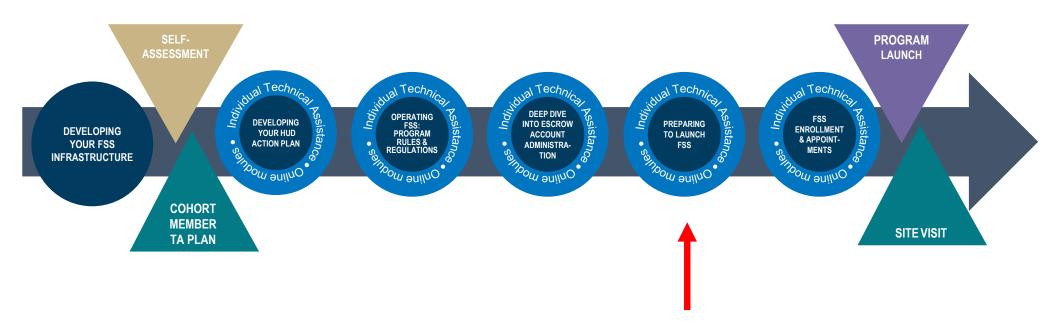


## Agenda

- Developing FSS Policies, Procedures & Workflows
  - Who to involve
  - How and where to document
  - √ Sample procedures
- Best Practices for Remote Services During Covid-19
- Developing a Marketing & Outreach Strategy
- How to Talk About the FSS Program



#### Reminder: Where Are We?



- Webinar 5
- Modules 1-6 complete in Compass' online course
- Currently in Phase 2 of program launch



## Reminder: FSS Launch Roadmap

#### **GETTING STARTED** LAUNCHING YOUR PROGRAM **MANAGING YOUR PROGRAM** LAUNCH **EXPLORATION** PLANNING **EVALUATION** PRE-LAUNCH Assess Resident Interest & DELIVERY Establish Escrow Assign Team Roles & Begin Marketing & Meet with Program Evaluate Program & Make Management Procedures Responsibilities Outreach Participants Regularly Improvements Develop Data Collection & Identify Funding for the **Conduct FSS Orientations** Manage FSS Escrow Report to HUD & Other Program Tracking Systems for Train Staff for Property Residents Stakeholders Program Management & Reporting **Enroll Participants and** Process Interim & Develop Policies & Select Properties Begin 1:1 Meetings Final Escrow Disbursements Procedures for Day-to-Determine Timeline Revised Program Manual Day Program Operations for Launch (Optional), HUD Quarterly Reports Participant Contracts of Determine Program Appointment Notes & Participation (COP) & Develop Outreach Model & Scope of Services Identify & Inform FSS Documentation, Escrow Account Strategy & Materials Individual Training and Statements Team of Their Resident Services, Property Services Plans (ITSP) Responsibilities Management/Accounting **Determine Staffing Needs** Develop CoP and ITSP Department, Site and Service & Hire Staff Templates **Delivery Staff** Develop & Submit Property Management/Accounting Property Management/Accounting Site and Service Delivery Staff Site and Service Delivery Staff Explore & Identify Community Partnerships FSS Program Manual (Optional), Marketing Materials, CoP and ITSP Escrow Management Procedures, Templates Data Management System, Action Plan Announcement to Key Staff of Intention to Launch FSS Resident Services, Property Management/Accounting, Site and Organizational Leadership; Service Delivery Staff Resident Services, Property Organizational Leadership; Management, & Accounting Resident Services, Property Management, & Accounting



#### Developing Policies & Procedures

- Clear FSS policies, procedures and workflows are key to successful program launch and smooth ongoing program operations
- Policies help staff to work together more effectively and, most importantly, enable you to provide the best experience for your program participants
- If you have already written or submitted your Action Plan, you have started this process



#### Who is Involved?

- Service Delivery Team
  - ✓ Examples: FSS Coordinator, Program Manager (if applicable), Director of Resident Services
- Property Management and Accounting
  - ✓ Examples: Property Manager, Site Accountant, Regional Supervisor, Director of Accounting
- Leadership (as needed)



- Set a clear review process with the team
- Clarify decision-making and roles in policy and procedure development
- Document policies and procedures clearly and make it accessible to the entire FSS team
  - ✓ Compass Best Practice: Create an FSS Program Manual
- Review policies from other programs at your property and reflect on what works well



#### What to Consider

Key Policies and Procedures Areas
Program Enrollment
Interim Disbursements
Escrow Crediting & Final Disbursements
Program Exits
Reenrollment
Program Appeals
Contract Extensions
HUD Reporting



### Program Enrollment

- Who will ensure interested residents are eligible for your FSS program?
- Who from the owner/agent will sign the Contracts of Participation (CoP)?
- How will your FSS staff collaborate to enroll new participants in your program?
- Where will you track participant enrollment? Who will log this information after the CoP is signed?



#### Sample Program Enrollment Process



Resident completes an application at an FSS orientation.

**Share List** 

After orientation, the FSS Coordinator sends the names of residents interested in FSS to the Property Manager.

Create Contracts Property Manager confirms that resident has an eligible subsidy type. She fills out the COP and signs and sends it to the FSS Coordinator within three business days.

Complete Contract The FSS Coordinator completes the COP and ITSP with the new participant. She shares copies with the FSS participant and sends the original copy to the Property Manager.

Record Enrollment The Property Manager adds the new FSS participant's information into the enrollment tracker.



#### Interim Disbursements

- Will you allow interim disbursements, and under what circumstances?
- How will FSS participants request an interim disbursement?
- Who will approve the interim disbursement request?
- Who will keep track of the documentation related to the interim disbursements?



#### Sample Interim Disbursement Process

Initiate Request FSS participant initiates interim disbursement request with FSS Coordinator by completing the disbursement request form.

Approve Request FSS Coordinator reviews the request, determines whether to approve, and sends the approved form to the Property Manager for signature with CC to Director of Resident Services.

Sign Forms

Property Manager signs the form, completes a check request form, and emails both to the FSS Accountant with CC to the FSS Coordinator and Director of Resident Services.

Cut and Mail Check FSS Accountant issues the check within 10 business days and forwards tracking information for check delivery to the FSS Coordinator.

Deliver Check The FSS Coordinator delivers the check to the participant in person. Participant shares receipts with the FSS Coordinator from use of funds after receiving the check.



#### Reminders

- Policies should be designed to support participants' goals and applied flexibly in your program
- We want FSS participants to succeed!



#### Questions?



#### Adapting Your Services During Covid-19

- Covid-19 has created a lot of uncertainty around how resident services can be delivered safely in the short and long term.
- This will affect your FSS program launch, so let's talk about some best practices for remote service delivery.



#### Transitioning to Remote Services

- Connect Virtually: Schedule appointments with FSS participants over the phone or a video call
  - Compass' Choice: Zoom, Google Voice, and Google Hangouts



- Use an Online Scheduler: Consider scheduling appointments using an online booking tool
  - Compass' Choice: youcanbook.me
- Share Information Securely: Identify a system that allows you to securely share sensitive information (e.g. credit reports, pay stubs, etc.) over email
  - Compass' Choice: Virtru



#### Transitioning to Remote Services

- Obtain Signatures Virtually: For CoPs, interim withdrawal requests, or graduations, explore ways for FSS coordinators and participants to securely sign documents online
  - Compass' Choice: DocuSign
- Make File-Sharing Web-Based: Consider a secure, webbased file-sharing system to share CoPs and other documents
  - Compass' Choice: Box.com
- Conduct Outreach Online: Hold 1:1 FSS orientations over the phone or group sessions via video chat
  - Compass' Choice: Google Hangouts and Zoom



#### Transitioning to Remote Services

# Protect Your FSS Participants' Privacy

- Close out all other windows before screen-sharing with an FSS participant
- Find a quiet and private space and suggest the FSS participant do the same
- Use headphones during your appointment so the FSS participant can only be heard by you
- Always ask permission





#### Questions?



#### **Developing Your Marketing Strategy**

- Outlined at a high level in your FSS Action Plan
  - ✓ Must ensure that you market the program to everyone at your property
- Take a "surround sound" approach, which involves using multiple touch points simultaneously to reach residents and generate FSS interest
- Focus on residents' aspirations and goals in your marketing materials



#### Monthly Postcards

#### A new group of savers is forming...



# Save the date!

Join us:

Saturday April 16<sup>th</sup> 12:00 pm

or

Wednesday April 27<sup>th</sup> 5:00 pm

in the Bay Meadow Community Room

COMPASS WORKING CAPITAL



#### Recertification Inserts

# Worried about your rent increasing?

Get the chance to save part of your rent through the Compass FSS Program!

Don't miss out!

Call now! 413-777-1213

#### Call now! 413-777-1213

Work one-on-one with a coach to...
buy a home,
start your own business,
increase your credit score,
send your child to college,
achieve your financial goals!
Call to learn more!

SIGN-UP BEFORE RECERTIFICATION!



#### Posters and Flyers

COMPASS

Workshop Series:

#### **Financial Goals & Dreams**

Workshop

#### Learn tips and tricks:

- · Set financial goals
- Create a budget to help you get there
- Learn strategies to increase your income
- Find out how the FSS Program can help you

#### **Workshop Dates:**

Wednesday , April 26th 2:00 PM - 3:30 PM

OR

Friday, April 28th

10:00 AM - 11:30 AM

Location:

**Cromwell Court Community Room** 

Text or call 401-777-1223 to

sign up!





#### Participant Stories

Participant stories can be one of the best ways to spread the word about FSS. We'll now watch a short video.





#### Other Approaches

- One-on-one touchpoints Every interaction is an opportunity to mention FSS
- Advertisements and stories in resident
   newsletters These will help create a true "surround sound" approach
- Brochures in move-in packets Frame FSS as a benefit of living at your property



#### **Group Discussion**

- Let's brainstorm some strategies that may be effective in marketing FSS at your properties.
  - √What messages will resonate with residents?
  - ✓ What challenges do you think you will encounter?
  - ✓ What successes and lessons can you apply to other experiences marketing new programs at your property in the past?



#### How to Talk About FSS

- Use monthly group or one-on-one orientations to publicize the program.
- Focus on resident's aspirations and goals for their future
- Every interaction is an opportunity to talk about FSS
- Make every staff member from property managers to custodial staff – an ambassador for your FSS program



#### Role Play: How to Talk About FSS

What does an "elevator pitch" for FSS sound like?



#### Questions?



## Next Steps & Homework

- Ensure your team has completed Modules 1-6 in Compass' online course
- Develop and document FSS program policies and procedures
  - Complete and submit FSS Action Plan to HUD if you haven't already
  - Determine how and where your organization wants to track FSS policies and workflows (e.g. Program Manual)
- 3. Create your FSS outreach strategy and materials
- 4. Schedule your next TA session with Compass