



Preparing to Launch FSS

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Presenters:

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Multifamily Housing Family Self-Sufficiency Program



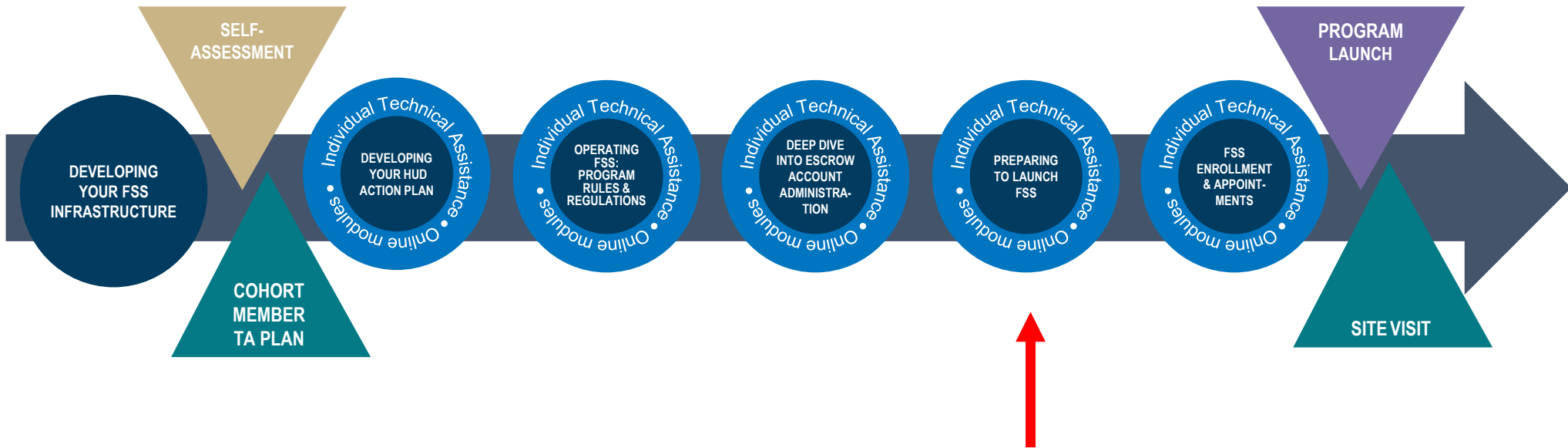
Agenda

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 - 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?

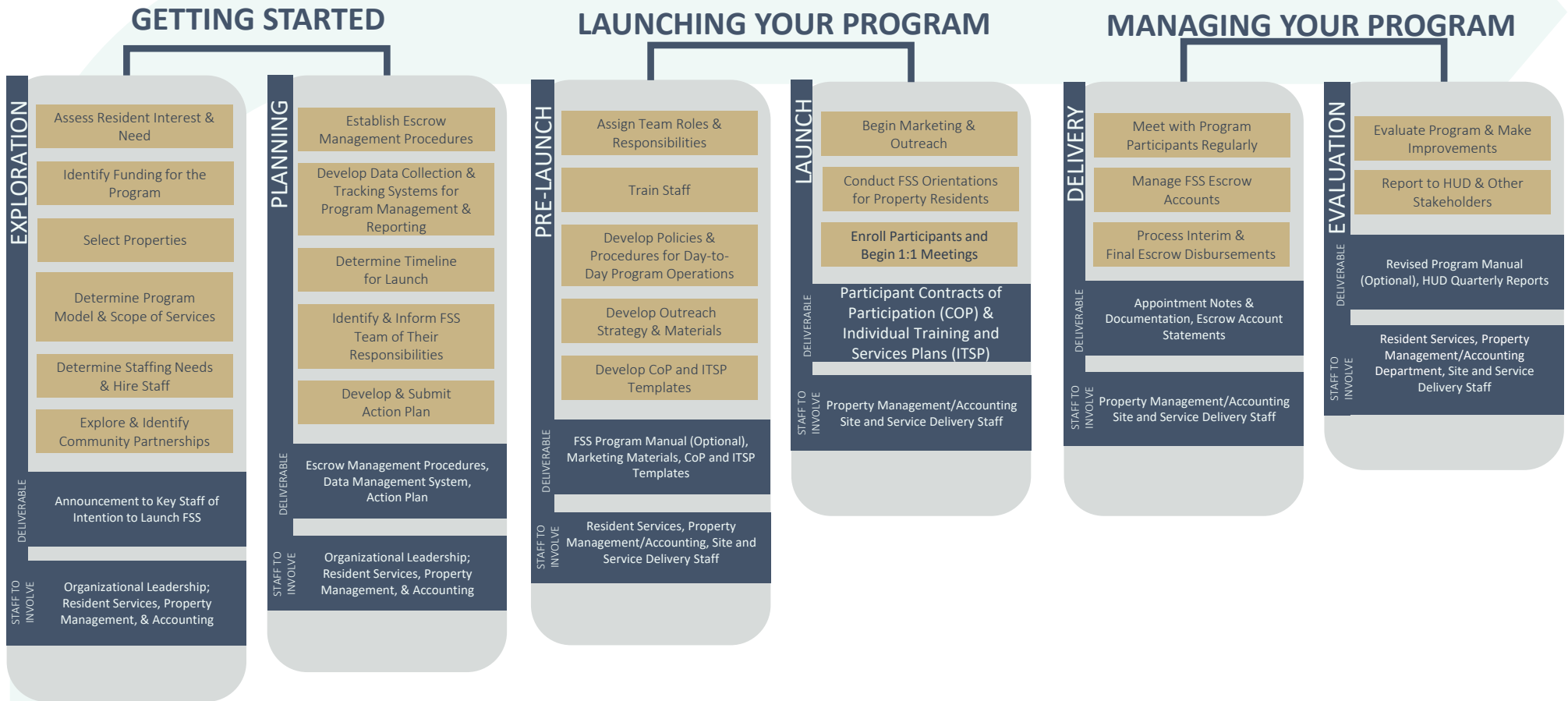


- Webinar 5
- Modules 1-6 complete in Compass' online course
- Currently in Phase 2 of program launch





Reminder: FSS Launch Roadmap





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)**





Best Practices

- 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





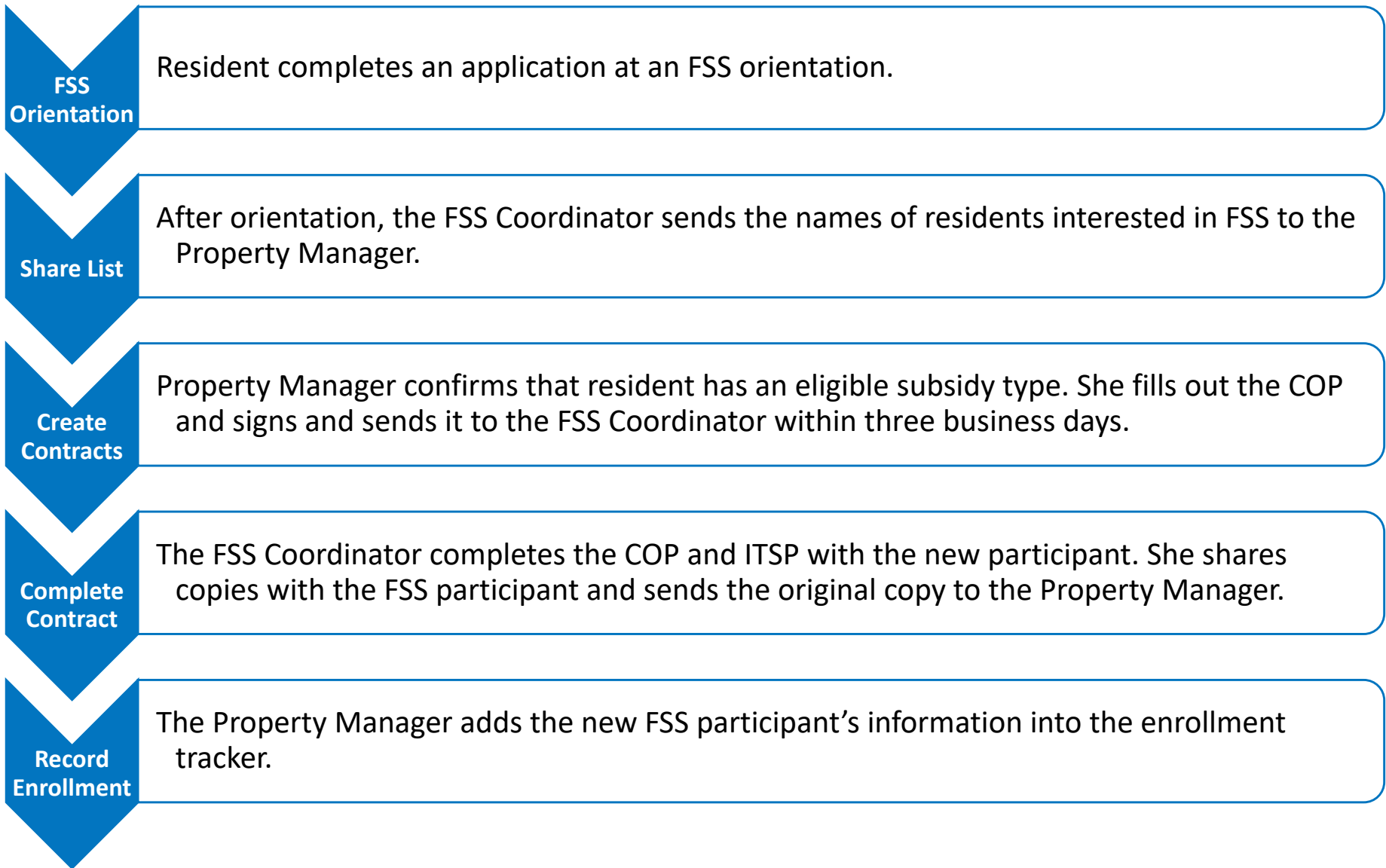
Program Enrollment

- 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





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, web-based 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 16th
12:00 pm**

or

**Wednesday
April 27th
5:00 pm**

in the
Bay Meadow
Community Room

TO SIGN UP: call or text your name to 413-777-1223

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**

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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
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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

1. Ensure your team has completed Modules 1-6 in Compass' online course
2. 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

