



# FSS Enrollment & Appointments

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Multifamily Housing Family Self-Sufficiency Program



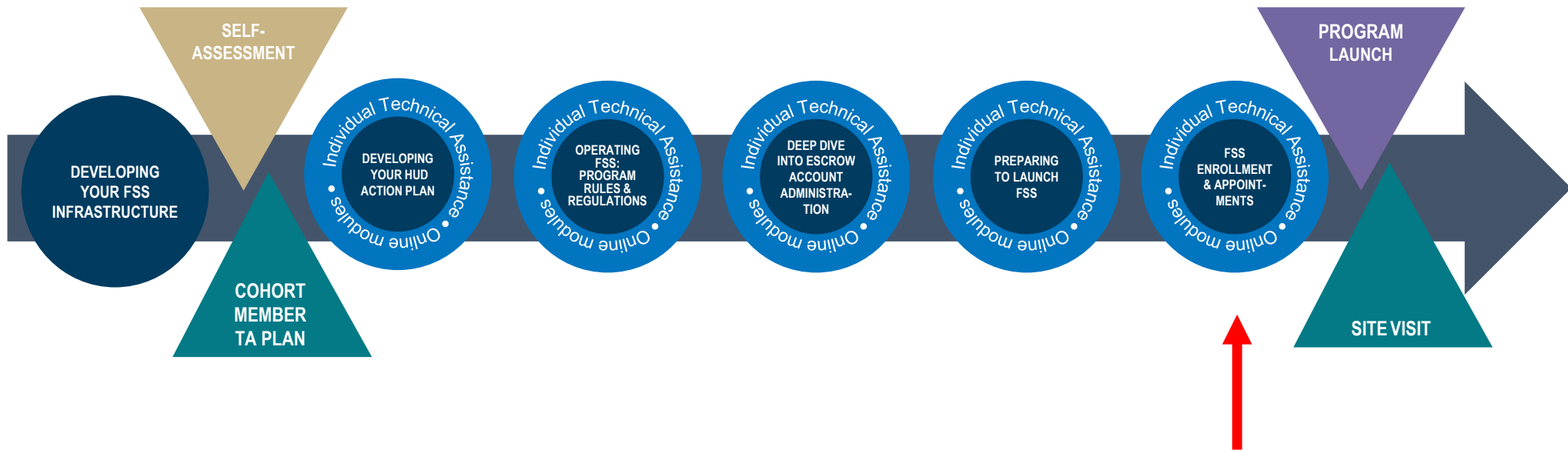
# Agenda

- Overview of the Contract of Participation (COP) and Individual Training & Services Plan (ITSP)
- Completing the COP and ITSP with new participants
- Best practices for conducting effective coaching appointments
- The initial FSS appointment
  - Participant assessments
  - Compass' intake appointment structure





# Reminder: Where Are We?



- Webinar 6
- Modules 1-7 complete in Compass' online course
- Currently finishing Phase 2 of program launch





# Overview of the COP and ITSP





# Enrollment Forms

- HUD requires residents to complete two documents to enroll in the FSS program
  - ✓ Contract of Participation (COP)
  - ✓ Individual Training and Services Plan (ITSP)
- Attachments A and B of HUD Notice H-2016-08
- The COP must be signed by both the owner/agent and the head of the FSS family



# Contract of Participation

- Sets forth the terms and conditions governing a resident's participation in the FSS program
  - ✓ Includes: Annual Adjusted Income, Annual Earned Income, Monthly Total Tenant Payment
- Start date is always the first of the month following the contract's signing
- End date is always the last day of the month five years later





# Start and End Dates

- A new CoP is signed on May 5<sup>th</sup>, 2020.
- It goes into effect on June 1<sup>st</sup>, 2020.
- It ends on May 31<sup>st</sup>, 2025.
- Contracts can also be extended for up to two years for “good cause.”





# Individual Training & Services Plan

- Written goals plan developed at enrollment with each FSS participant
  - ✓ Establishes specific interim and final goals based on the participant's interests
  - ✓ Modifiable and can be changed throughout the program
  - ✓ Should be reviewed regularly







# Completing the COP and ITSP





# Completing the COP

- Typically involves collaboration between the service delivery team and onsite property management team
- Usually, the resident signs the COP in their first appointment with the FSS Coordinator
- Important to talk through each step of the COP with a new participant



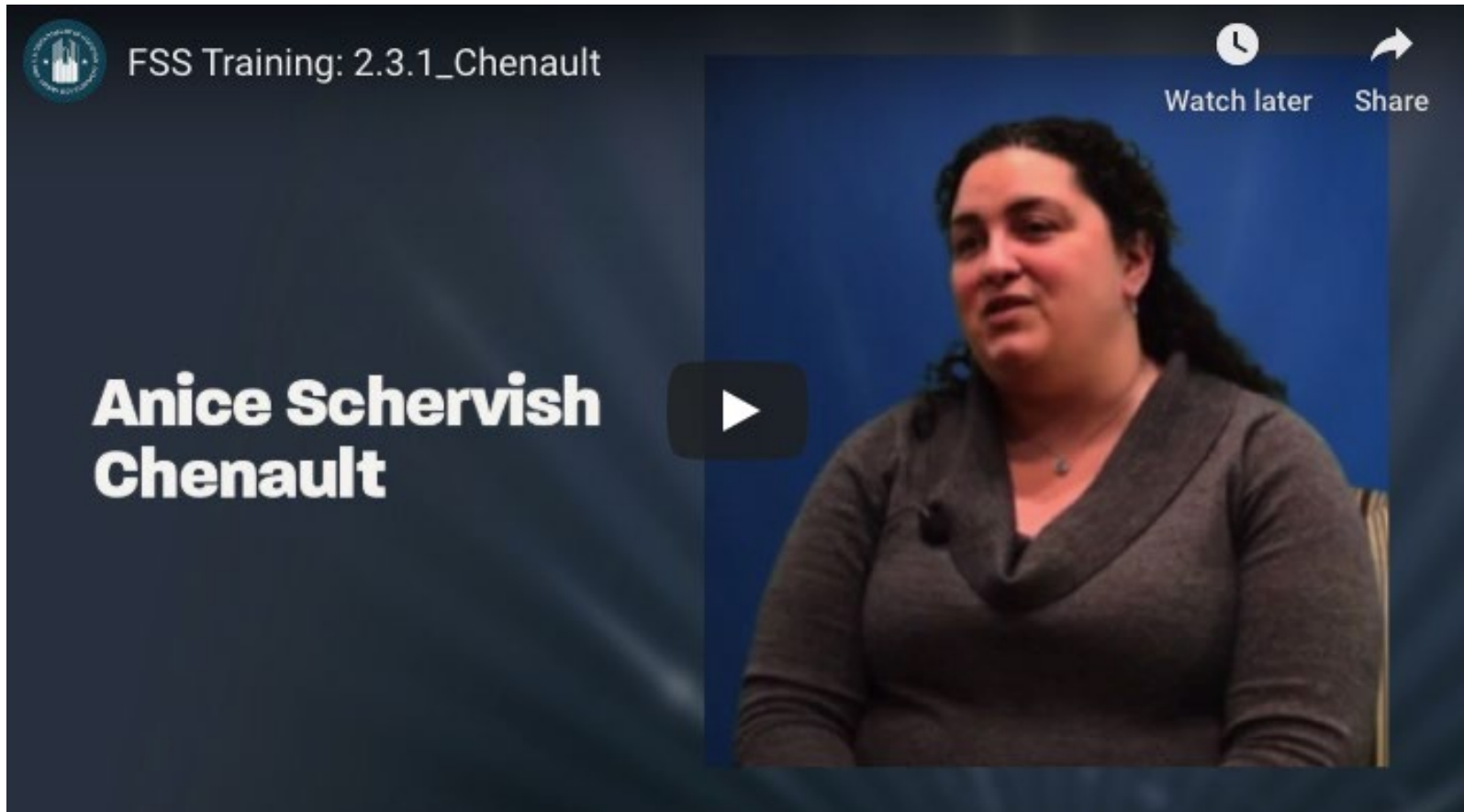


# Role Play: Explaining the COP

- Now, we'll demonstrate how to walk through a COP with a new FSS participant
  - ✓ Link: [Contract of Participation](#)



# Video: Purpose of the ITSP





# ITSP Best Practices

- Guidance from HUD's FSS Guidebook on ITSPs:
  - ✓ Take a flexible and open approach to changing goals over time
  - ✓ Participants are the experts in their own lives and there are no "right" answers to goals
  - ✓ Keep ITSP goals broad so they do not become a barrier to graduation
    - "Build savings" vs. "Save \$2,000 in an account with a 1.5% interest rate"
    - "Work toward homeownership" vs. "Purchase a home by graduation"





# Developing ITSP Goals

- There are two required goals for all ITSPs. These are also graduation requirements:
  - ✓ Head of household must seek and maintain suitable employment
  - ✓ All members of the household must be free of cash welfare assistance for 12 consecutive months prior to graduation
- Develop one final program goal and 2-3 other interim goals to support it. For example:
  - ✓ Final Goal: Prepare for Homeownership
    - Interim Goal 1: Obtain and review credit report
    - Interim Goal 2: Complete homebuyer's education session
    - Interim Goal 3: Reduce collection debt





# Group Discussion

- Let's brainstorm some strategies for effectively setting goals with FSS participants.
  - ✓ What successes and lessons can you apply from other experiences setting goals with residents at your property?
  - ✓ What challenges do you foresee?





# Additional Resources

- Additional resources on goal-setting and ITSPs:
  - HUD's Online FSS Training:  
<https://www.hudexchange.info/trainings/fss-program-online-training/>
  - HUD's Guidebook "Administering an Effective FSS Program":  
<https://files.hudexchange.info/resources/documents/FSS-Program-Guidebook.pdf>





Questions?





# Appointment best practices





# Appointment Purpose

FSS appointments serve several important purposes:

- Identify barriers and discuss solutions
- Link FSS participants to supportive services and programs that may help them make progress on their goals
- Provide encouragement and support to FSS participants
- Review the ITSP goals and modify as needed



# Appointment Frequency

- HUD does not require a certain number of FSS appointments per year
  - ✓ Regular communication with FSS participants can help build strong, trusting relationships
- Compass meets with participants every six months, except for the first year when we meet with participants quarterly
  - ✓ Offer interim appointments at any time as requested
- Other programs meet with participants three or four times per year or at a different frequency



# Participant-Centered Approach

- Allow participants to drive the process of identifying goals
- Ask motivating questions to prompt participants to determine the best course of action and act when ready
- Inform participants of resources and opportunities in the community based on their expressed interests
- Help participants understand the pros and cons of different approaches, and support them when they decide how best to meet their goals
- Make referrals to services in partnership with participant, recognizing that the participant is the expert in their own life





# Regular Appointment Activities

- There are several activities you can expect to complete with participants regularly in appointments.
  - ✓ Connecting participants to resources and supportive services to make progress on their goals
  - ✓ Discussing and adjusting ITSP goals, as needed
  - ✓ Discussing and processing interim disbursements, if your program allows them
  - ✓ Sharing FSS escrow balances





# The initial FSS appointment





# The Initial FSS Appointment

- Important opportunity to get to know a new FSS participants through a Participant Assessment or other process for exploring their aspirations and obstacles to achieving their goals
- Usually includes the FSS enrollment paperwork (i.e. COP and ITSP)
  - ✓ You can also choose to complete this paperwork separately





# Participant Assessments

- Critical first step to understand a participant's needs and goals
- Typically one of the first interactions you will have with a new participant
- Good opportunity to begin establishing trust and a relationship for your long-term partnership





# What's Included?

- **Basic Family Information**
  - Living situation, number of children, food security
- **Education History and Goals**
  - Education level, licenses, certifications
- **Employment History**
  - Current employment, skills, career history and interests
- **Finances and Asset Building**
  - Household income, budget, credit, and debt
- **Resource Needs**
  - Transportation, clothing, childcare, health concerns, etc.





# Compass' Intake Appointment

- Compass' online course includes two appointment tools from our own programs that you can reference:
- Sample Intake Appointment Checklist:
  - ✓ Welcome & Paperwork
  - ✓ Getting to Know the Client
  - ✓ Client Goals
  - ✓ Budget
  - ✓ Credit Report
  - ✓ Resource Needs
- Getting to Know Program Participants:
  - ✓ Household Composition
  - ✓ Employment History
  - ✓ Educational Background
  - ✓ Financial Situation





Questions?





# Next Steps & Homework

1. Ensure your team has completed Modules 1-7 in Compass' online course
2. Review the COP and ITSP in detail
3. Schedule your next TA session with Compass
  - We can discuss your approach to appointments and answer questions about program enrollment when we meet.

