



Developing Your FSS Infrastructure

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Multifamily Housing Family Self-Sufficiency Program



Housekeeping

- Best practices for smooth audio:
 - ✓ Join meeting using the **Call Me** feature.
 - ✓ Join each training session individually (rather than in a group or conference setting) with your own computer and telephone connection.
 - ✓ If you have followed the instructions for connecting and are still experiencing issues, please contact Jeanne_Goodman@abtassoc.com.
- During the webinar, everyone will be muted. If you have a question please:
 - ✓ Use the Q&A box to type any questions, or
 - ✓ Use the raised hand button to get our attention





Agenda

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 - A few reminders
 - Overview of the FSS launch process
 - Assembling your FSS team and establishing team roles
 - Overview of escrow administration
 - Data management for FSS
 - Introducing the FSS Self-Assessment Tool
 - Next steps and homework





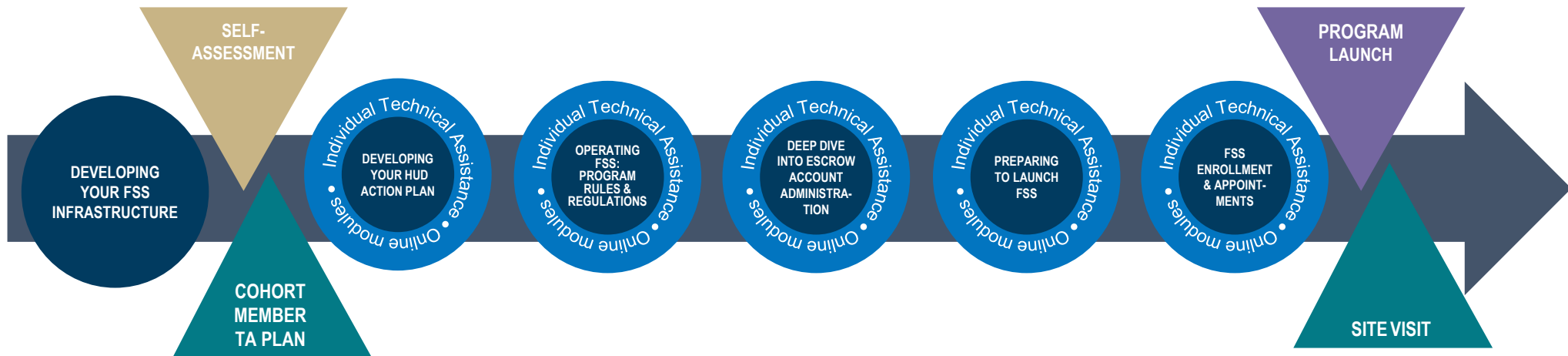
Technical Assistance Team

- HUD Contact: Carissa Janis
- Technical Assistance (TA) Providers:
 - Abt Associates - Madeline Colety, Elizabeth Giardino
 - Compass Working Capital - Chelsea Pennucci, Sandra Suarez





Technical Assistance

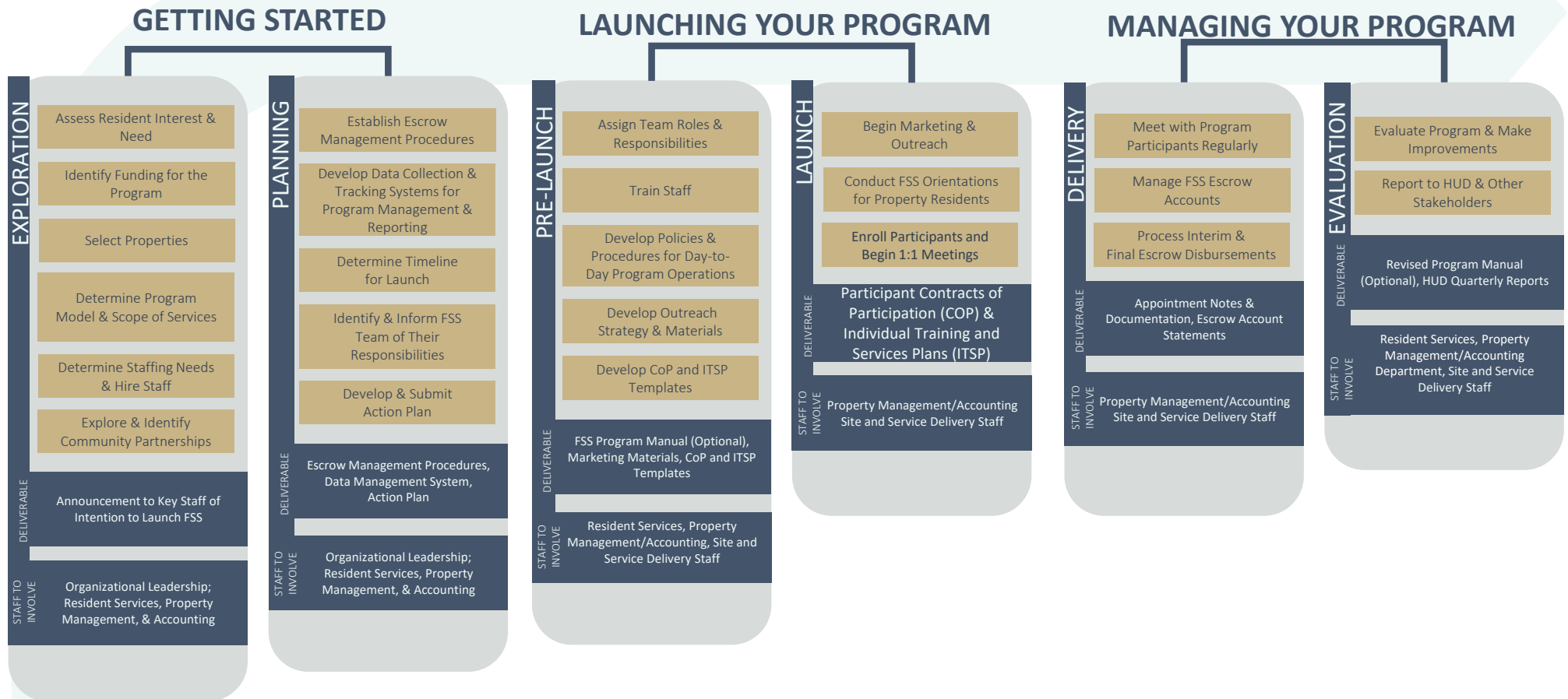


- Six webinars
- Individual assistance
- Self-guided training – Compass modules
- Site visits as needed





FSS Launch Roadmap





Phase 1: Getting Started

In this phase, you will lay the groundwork for your program with activities such as:

- Identifying program funding
- Assembling your FSS team
- Determining your program model
- Identifying community partners

Some key milestones include:

- Determine a timeline for program launch
- Hold a team kickoff meeting
- Begin drafting your FSS Action Plan





Phase 2: Launching Your Program

In Phase 2, you will get ready to launch your program with activities such as:

- Develop detailed policies, procedures, and day-to-day processes
- Train staff to carry out FSS responsibilities
- Create an outreach strategy and materials
- Develop an FSS Program Manual (Optional)

You will also begin marketing, conduct FSS orientations, and enroll your first participants.



Phase 3: Managing Your Program

Once enrollment begins, you will be responsible for the ongoing management and improvement of your program, including:

- Conducting outreach and orientations
- Enrolling new participants
- Meeting with participants on a regular basis
- Reporting to HUD and other stakeholders on progress and outcomes

During the weeks immediately after you begin enrollment, you will begin to identify early successes and challenges to address.





Case Study: Sileny's FSS Journey

Sileny joined the FSS program at Hillside Village, a property owned by Preservation of Affordable Housing in Rhode Island. She enrolled in the program just four days after moving in and got right to work with her Compass Financial Coach.



“I felt comfortable at Hillside, but didn’t want to stay forever in subsidized housing,” Sileny shared. “I appreciate that POAH was there to help us and supported us in our goal to buy a house. Now I know how to do it.”





Case Study: Sileny's FSS Journey



1. Outreach

Sileny hears about FSS through the property manager at move-in time. She also saw an FSS poster at the property.

2. Attend Orientation

Sileny attends an orientation to learn more about the FSS program.

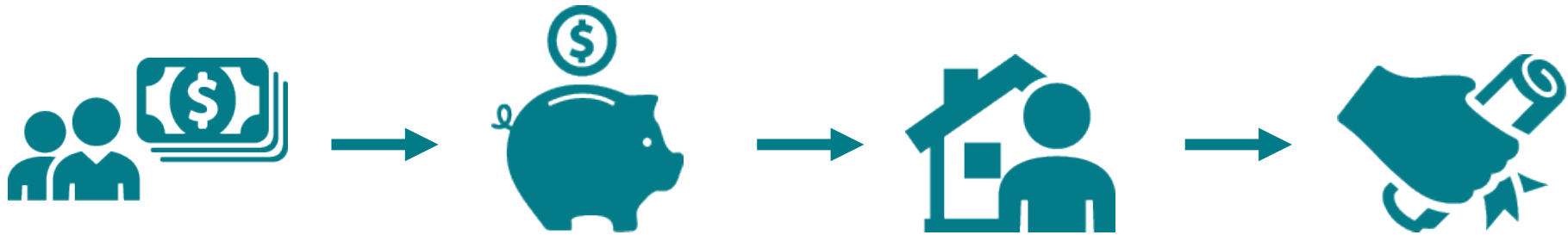
3. Enroll and Set Goals

Sileny is excited about FSS and meets with an FSS Coordinator to enroll and set initial program goals.





Case Study: Sileny's FSS Journey



4. Meet One-on-One

Sileny meets with her FSS Coordinator on a regular basis to help make progress on her goals and connect to resources.

5. Increase Income and Save

Over time, Sileny increases her income from work, reports it to property management, and begins saving in their FSS escrow account.

6. Achieve Goals

Sileny achieves her goals, including her goal to save for her move to a market rate apartment. Her goals were modified as her priorities and circumstances changed throughout the program.

7. Graduate and Celebrate!

Sileny graduates early after three years in the program. Most participants complete the full five years of the program and some extend their participation by up to two years if there is "good cause."





Building Your Foundation

In the rest of this webinar, we'll cover three areas that are important to a successful program launch:

- Assembling your FSS team and aligning stakeholders
- Setting up your escrow administration systems and processes
- Determining how you will track participant data





Assembling Your FSS Team

The HUD FSS Program notice outlines responsibilities for FSS program coordination in Section IV.B.

In our experience, FSS launch and operational responsibilities can be organized into a few main groups

- Leadership
- Escrow Management
- Program Management and Ongoing Coaching/Case Management



FSS Team: Leadership

You will need someone to define the vision for the program and lead its implementation.
Responsibilities include:

- Authorizing the establishment the FSS program
- Serving as liaison to HUD
- Helping to secure funding for program operations
- Overseeing program implementation and staffing





FSS Team: Escrow Management

The escrow management responsibilities are often carried out by members of onsite and corporate property management and accounting teams. Responsibilities include:

- Ensuring the smooth and accurate administration of the escrow accounts
- Processing and tracking FSS enrollment, escrow disbursements, and graduations
- Identifying and troubleshooting issues as they arise





FSS Team: Service Delivery

Staff in this role(s) oversee daily program operations and provide support to participants during FSS. Responsibilities include:

- Overseeing day-to-day operations of the program
- Coordinating with community partners to link participants to services
- Meeting one-on-one with FSS participants





Convening Your FSS Team

Convening the entire FSS team at key program milestones is important to ensure FSS stakeholders at every level are aligned.

A few examples of these milestones include:

- At the beginning of program planning (i.e. launch kickoff)
- Prior to FSS Action Plan submission
- At the start of program enrollment



Questions?





Group Exercise: Aligning Your Team

Launching a new FSS program can mean new or additional responsibilities for members of your team. With competing priorities, this can often feel difficult or overwhelming. Let's discuss:

- Has anyone in the group experienced these challenges yet? If not, what do you expect to hear from your staff? Either way, let's brainstorm what we can all do to generate buy-in and excitement for the program.

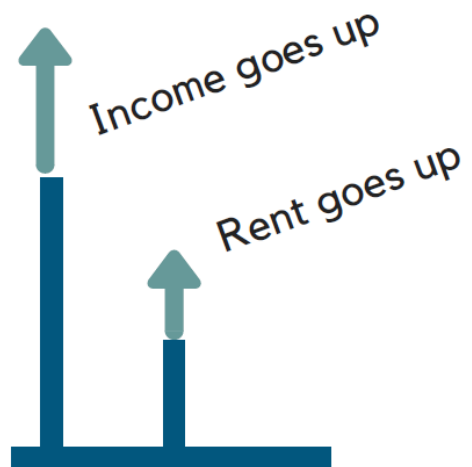




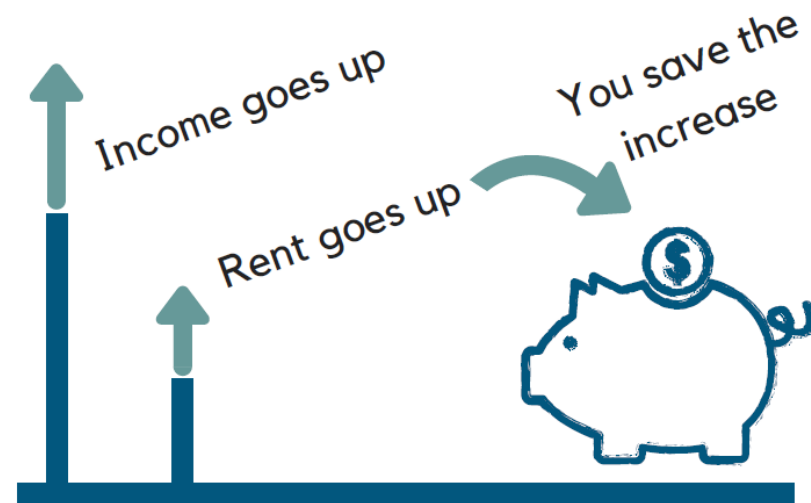
Escrow Savings Mechanism

FSS allows participants to save any increase in rent triggered by an increase in earned income in a savings account, creating a powerful opportunity for families to build savings and assets.

Without FSS:



With FSS:





Case Study: Basic Escrow Calculation

When Janet enrolls in FSS in March, her monthly income from work totals \$600. As a result, her monthly TTP is \$180. Six months later, after taking on extra hours at her job and securing a raise, Janet's monthly income from work is now \$1,000. The money deposited into her family's FSS account each month will roughly equal the increase in her TTP.

	Monthly Earnings	Monthly TTP	Monthly FSS Savings*
March 1, 2019	\$600	\$180	\$0
September 1, 2019	\$1,000	\$300	\$120

$$\mathbf{\$300 - \$180 = \$120}$$





Escrow: Key Responsibilities

- **Enroll Participants**
 - ✓ Identify eligible residents
 - ✓ Verify eligibility and prepare contracts of participation
 - ✓ Record enrollment
- **Administer Escrow**
 - ✓ Calculate escrow
 - ✓ Bill HUD for escrow (OARQ adjustments)
 - ✓ Process interim and final disbursements
 - ✓ Audit escrow accounts
- **Report to HUD**
 - ✓ Complete the escrow section of HUD's quarterly reporting tool



Tracking & Managing Escrow

- Property management software and systems
 - ✓ Yardi – has custom FSS module, full module in the works
 - ✓ Other packages/systems – no modules yet, combine with other tracking
 - ✓ Note: No system includes the escrow calculation (must use Excel escrow calculator)
- Tracking and Staff
 - ✓ Several different processes are involved in escrow
 - ✓ Ensure that all staff know how their jobs relate to FSS escrow and billing
 - ✓ Designating a single staff member with ultimate responsibility for tracking and reconciling FSS escrow can help

New resources are coming soon!





Questions?





Participant Data Management

Before launch, it is important to determine how and what data you will track on your program participants.

- You will need a way to track case notes, appointment dates, and other relevant information from your work with FSS participants.
- At minimum, you should be tracking the data you need to report to HUD on a quarterly basis. Section V.B of the notice provides more detail on reporting requirements.



HUD Quarterly Reporting Tool

Let's briefly review the primary components of the HUD quarterly reporting tool.

- Basic tenant information and other details from the FSS Contract of Participation (COP)
- Current benefits and assistance received by the family
- Services provided to the participant during FSS
- Outcomes at graduation
- Escrow total and credits by month





Data Management Options

Many FSS programs use stand-alone case management software to track this information. A few examples are listed here.

- FSS Pro by HAPPY Software
- Elite Family Self-Sufficiency module by Emphasys Software
- Tracking-at-a-Glance by Designing Success
- Efforts to Outcomes by Social Solutions
- AASC Online – FSS by Pangea
- Online Work Readiness Assessment Tool from HHS (Free)



Questions?





Self-Assessment Tool

The FSS self-assessment tool will help you assess and track your progress in developing your program design and structure.

- Funding
- Property Selection
- Program Model & Staffing
- Escrow Management System
- Participant-Level Data Management & Reporting
- Action Plan Development & Submission
- Final Launch Readiness





Next Steps & Homework

- Keep an eye out for an email welcoming your organization to the FSS TA Portal
- Complete the Self-Assessment Tool by January 31st and upload it to your organization's page on the FSS TA Portal
- Complete training and review the homework from Modules 1 and 2 of Compass' online course
- Sign up for your first individual TA session with Compass





Questions?

