



[00:00:00] Janis: you all joining us today. We're going to get started with recording this session, and if you have not already just chat into the box, name, and where you're coming to us from, we can all get to know each other. Thanks again for joining. I'm going to just go through a few quick housekeeping tips and then a few other pieces and then get us started. Today's session is going to be posted with the slide deck and relevant additional resources shortly. I'm going to, in a minute, give you the link to where the previous recordings for the sessions that have already happened are posted. You can join the webinar by phone or through your WebEx audio.

The chat feature, I see many people are already using it. Just make sure that you click "all participants in the drop-down menu, where it says "Send to," type your chat message in and then click send, and that will put your message into the chat. We'll use that today for any questions that come up, thoughts, comments, we're going to have some questions out to you, so please we'd love to see an active chat as always here. The Moving On Training Series, this is the fourth of our sessions.

Recordings of the previous sessions can be found in the link that I'll share on the next slide and we can also put that link in the chat. Just as a reminder, or if you haven't joined any of our previous webinars, the content for this training series is based on lessons learned by CFH from almost two decades of our work in States across the country, as well as all the work done through the HUD, Moving On TA initiative.

This curriculum draws on some of the written products that we put out through HUD, as well as the collective experience of all the speakers that you're going to hear from today and through the other sessions. Most importantly, in preparation for these trainings, we did two focus groups with individuals who have moved on from supportive housing, whether it's through Moving On programs or on their own and we have really tried to center their lived expertise and collective wisdom in our messages and recommends. This is a session focused on substance screening and referral processes.

Upcoming sessions, we'll talk about creating a culture supportive of moving on in your PSH programs and in your systems. We'll talk about moving on services in supportive housing a month from now and then our final session is going to focus on outcomes tracking and evaluation. Here's the link to previous webinars. We have the-- Sorry, the information for each webinar, including the recording, the slides, and other attached resources are available on the registration pages for each of the sessions. If you click this link to the webinars series, then you will see that each session listed under the registration line, you can see get credits. That button is lit up for all three of the first sessions at this point.

When you click that, you scroll to the bottom and you can find the resources. We're still waiting for the Miami resources to be posted on the Moving On resources section. If you attended that and are waiting for those resources from Miami, they should be up there too. Just quickly before we jump into the session today, I just
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wanted to announce that in addition to the training series sessions that we have coming up, please tentatively hold the date if you're interested, Wednesday, May 26th at 2:00 PM Eastern daylight time for Moving On office hour.

People can ask questions throughout these sessions as we go through but, if you have specific questions, if you want to talk through any of what you've learned here and how it applies to your community, or just want to raise other things that come up, you can join that office hour session. It's just going to be entirely open for people to ask questions and have some discussions.

Now, we just want to do a quick poll and then we will get into everything for today around what would be of interest to you and your community in the future. We're doing this training series now but just interested in hearing if you would be interested in direct technical assistance, trainings on topics that we haven't covered in our webinar series to date, or that doesn't look like it'll be covered in future sessions, opportunities for peer discussions or other, and you can put into the chat what that is. I just want to be really clear, this is just a general asking to see what you might be interested about in the future.

If you say that you're interested in direct technical assistance, here it's not a formal request to HUD for that technical assistance. We're just seeing what people might be interested in around this topic. Give it just a few more seconds. It looks like we've gotten that poll in, but thanks so much, we'll take a look at that. Now, I'll just introduce you to our panelists for today. We have Amber, Ariana, and Johnna from CSH who will be doing different parts of our presentation and excited now to turn it over to Amber to walk us through the overview agenda and some Moving On basics.

[00:06:19] Amber Buening: Hey, thanks, Janis. I don't know if you could give me control of the slides, that would great. Thank you. My name is Amber Buening. I use she, her pronouns. I work for the training center at CSH, and I don't know if Ariana or Johnna if you want to introduce yourself as well before we get started.

[00:06:45] Johnna: Hi everyone. Happy Wednesday. This is Johnna Lowe, senior program manager on our Illinois team in CSH.

[00:06:54] Ariana: Hi, Ariana Sanders, also a senior program manager at CSH, on our Southwest team. Happy to be here.

[00:07:02] Amber: Thanks. Just a quick overview of what we're going to be talking about today. We're going to address how to engage tenants who may be interested in moving on. We're going to address how to set up assessment screening and referral processes for moving on programs, so hopefully, by the end of the session, you'll be equipped with strategies for engaging tenants around these opportunities and then be able to identify key components of assessment screening and referral processes, as well as being prepared to have those conversations with your key stakeholders.



Firstly, we want to talk about moving on basics, then we'll have an overview of engagement assessment and referral, and then we will talk more about engaging tenants around moving on, followed by moving on assessments, and then finally we'll focus on application and referral processes. But before we dive in, again, we want to have another poll just to get a sense of who all is on the line today. Emma, if you could pull that poll up again and if folks could complete the poll. Just let us know what your role is in the homeless assistance and housing system.

[00:08:35] Emma: Hi, Amber. I'm having some issues with my WebEx, so if everyone could just put in the chat, that would be really helpful.

[00:08:41] Amber: Sure. Great. Thanks. Like Emma said, if you could put in the chatbox what your role is, whether that's COC leadership, public housing agency, local government, supportive housing provider. Great. It looks like we have a good mix of government housing providers, COC leadership, supportive housing agencies. Great. Thank you. These are coming in quick, so we appreciate it and if you want to keep doing that, please feel free to continue writing in the chatbox what your role is. That gives us a sense of who's all on the line today.

While you're doing that, I'll go ahead and get us started with a review of moving on basics from the last few webinars in case anyone on the line is new to the series. We would just want to quickly review these concepts. Hopefully, most folks are familiar with these terms but really quickly continuum of care is what we mean by COC. It's a planning body that's responsible for coordinating homeless services. We have PSH which is Permanent Supportive Housing. It's permanent housing that's also paired with services to assist folks who are experiencing homelessness achieve housing stability. We have PHAs, Public Housing Agencies which are governmental entities or public bodies authorized under the states to administer housing or rental assistance programs.

A few other definitions moving on, it's a program that assists tenants who already and wish to leave supportive housing by connecting them with affordable housing and financial assistance, and then racial equity which is a condition that would be achieved if racial and ethnic identity no longer statistically predicted outcomes, such as homelessness. To get into moving on basics as a reminder for anyone who has attended other trainings in the series, we're just going to level set for anyone joining us for the first time to just provide a quick overview of what we mean when we say moving on.

The primary goal of a Moving On program or strategy is to support independence and choice for those who are ready and desire to move on from supportive housing. Although, supportive housing tenants are allowed to leave whenever they want, many tenants who no longer want or need intensive services remain in supportive housing because they continue to need rental assistance. Moving On programs enable these tenants to move on by connecting them with affordable housing and other financial resources and providing transition supports to set them up for long-term stability and success.

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In some cases, tenants may not need or be eligible for affordable housing but could still benefit from financial or transition supports to ensure they are set up for long-term stability once they move. Finally, for some tenants moving on will involve a physical move to a new home. In other cases, it may just involve a transition in place arrangement where the services move on to another tenant while the moving on participant remains in their current housing with a new operating subsidy.

Looking at the guiding principles, moving on should always be voluntary. Tenants should be able to make an informed choice about whether they are interested in moving on from supportive housing things or working towards that as a future goal. This means that tenants should be aware of the options for moving on, whether through a dedicated program or on their own and the potential benefits or drawbacks for them of pursuing moving on. Collaboration is critical for the success of moving on. CoC, supported housing providers, PHAs and other key partners should work together to design and implement programs that meet all the needs of tenants who are moving on.

Community-based support which may include mainstream services and resources as well as community-based and personal support such as houses of worship, support groups, family et cetera, are key resources to ensure that tenants are stable once they move on from supportive housing. Last, something we heard from almost all of the individual in the focus groups that Janis mentioned earlier was that, they wished there had been more support available for them as they navigated the processes of connecting to housing vouchers and other resources, finding a new home, making the transition and getting through the adjustment period after leaving supportive housing.

This support is critical to helping tenants feel secure and comfortable in their new situation. Whenever possible, the support from the supportive housing providers should be provided or reinforced by a peer or someone with the expertise. With that, I'll hand it over to Johnna.

[00:14:46] Johnna: Thank you so much, Amber. We're now going to focus on presenting an overview of the engagement assessment and referral components in this part of the presentation. The component is the second in the five process. It's important to be just as intentional about this component as we've been with the long term support on working with the folks that we serve. We do have another poll question presented. We will love to learn about what's happening in your communities. If your community is currently implementing Moving On, are you using a standardized assessment tool for the tenants? If you all could take a couple minutes to answer your questions, we'd really appreciate it.

[pause 00:15:38]

[00:16:11] Johnna: Either folks have currently implementing it in their community, they're thinking about it or planning it, not happening yet or folks are not sure. We'll give it maybe a couple more seconds.

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[silence]

Great. it looks like we got some good responses. Looks like most folks are in category A or B, and they're currently implementing a Moving On plan or having some conversations in that planning stage. Thank you everyone who participated in that poll role. In this part of the process, we want our residents to feel supported, just as supported as they felt when they first started their permanent supportive housing program, so we aim for transparency, person-centered activities as well as focusing on harm reduction. We don't want our residents to feel rushed or forced or bullied into making decisions.

Moving On is hopefully looked at as a celebration and an opportunity to celebrate that resilience in growth as a person, individual and as a family and a milestone in their thriving. We want this journey to be empowering so it becomes important in creating an infrastructure that can be positive for all of us. This means be in integrity field, transparent and assessing how our internal entities and collaborative work is pouring into the empowerment and not causing a hindrance. This may be because we're having new conversations with our participants or even our partners. As many people highlighted in the poll, these folks are still in the planning stage, and so we're hoping that in that process folks are having these conversations with the long-standing partners about new approaches.

Assessing the how we do things, can provide so much opportunity for improvement. In our Moving On program, much like other programs, we want to consistently assess the how and the why. Here's some considerations to keep in mind to ensure that you're creating a Moving On program that works for everyone who's interested. It's essential when operationalizing to think about receiving input from a diverse group of people in the applications, ensuring that the Moving On is promoted to all the tenants and not just some of the tenants, that communities are tracking participation by race, and then making sure we're doing our part to assess the equitability of the programs and if not equitable, why, and then of course changing the program as we see needed.

We can also create a diverse leadership team for our Moving On initiative. It might be great to connect with former supportive housing and permanent supportive housing tenants who may have moved on even though they did it without a program. Application must be accessible in multiple languages, and also we're receiving diverse input on the application from the groups in the leadership team that are working on it.

As excited as it would be to hear, everyone is eager and excited to be a part of the Moving On program, we are still going to have to utilize our skills in the engagement around keeping people involved in learning about what the program is. We have another wonderful poll question. This is for the permanent supportive housing providers. When, if ever, do you engage program participants around the concept of moving on from permanent supportive? Hopefully, folks can answer that poll.

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[00:20:27] Amber: That's just going to be a discussion question. Just type your answer in the chat.

[00:20:31] Johnna: Oh, wonderful. Thank you so much. Yes, we'd love to hear from you all on the chat.

[silence]

[00:20:44] Johnna: Yes. Folks were giving some great feedback. Thank you so much for that. At program entry, the initial meeting, someone mentioned from day one integrating it into the programming doing annual recertification periods. These are all really great responses and keep those coming. We learn so much from each other in these wonderful opportunities.

Engagement for Moving On should start as soon as tenants enter the program. Tenants should know that while they're in permanent supportive housing, and it can be a permanent solution for many tenants, individuals who choose to move on eventually will be supported to do so. This culture will help tenants feel empowered to move on if they feel that supportive housing is no longer the right fit for them. A great way to create this culture is by inviting individuals who have moved on from supportive housing to come back and visit and tell their story to the program.

In addition to the general engagement you do with the program participants around the overall concept of moving on, there are a few things to keep in mind when engaging program participants about a specific opportunity to participate in a Moving On program, but definitely be transparent. In my experience working with Moving On, I want all the stakeholders, primarily those participants and residents to know everything I know. Creating program processing maps or a step-by-step sheet or even program description flyers can help support that transparency. Something we heard from many focus group participants with that information about Moving On programs was not widely available.

This puts the initiative at risk of letting staff bias influence who can access the Moving On resources and generate a feeling of unfairness and a lack of trust between staff and participants. Remember guiding principles, they're voluntary. We use supporting choice, economic, mobility, and self-sufficiency, and long-term success. Creating a Moving On culture means not just about the current opportunity to move on, but having those discussions become a part of that ongoing support services, conversations. Help also set realistic expectations and ensure that tenants and providers fully understand the opportunity and implications as well as a tentative timeframe or experience time line.

Effective engagement is critical to ensuring program participants are aware of the Moving On is an option if they are ready and to spark their interest in pursuing that path. Initial engagements, just stress that, although program participants can stay in permanent supportive housing as long as they want, if they come to a point where



they no longer want or need services, they can talk to their providers and really get the support to pursue those goals.

Providers should emphasize the following key principles. Moving On is always volunteering. It's a program. It's designed to increase opportunity for growth and choice, not to put pressure on anyone to leave. That Moving On does not mean program participants will not be left with any services. They're just leaving behind the wraparound support services in supportive housing.

Providers will work to ensure that our program participants move on and are connected to appropriate mainstream community-based supports and services and resources to meet any ongoing needs they may have. Incorporating a question of whether or not the program participant wants to explore our options around Moving On or into regular assessment could help in normalizing the Moving On program in the conversation. Informing program participants, that is an option to discuss whether they are ready.

Building such conversations into regular case management allows for support service staff and program participants to explore the idea over time and that they can identify any concerns or hesitations, build motivation and confidence, and then also identify any services that program participants need to be connected to position them to be successful in moving on. This means that engagement happens in marketing and in informative conversations with residents, and that these conversations should not be filled with pressure or persuasive connotation, but simply assessing the realities and the capacity of living in affordable housing and community and utilizing community resources.

In permanent supportive housing, tenants are in scattered site limited situations, transitioning in place maybe an option for them, which means perhaps the type of voucher live in can change or their services will be changed. If they decide they want to transition in place, understanding the implications, what will be different, what will be the same understanding how available housing options such as housing choice vouchers, public housing, affordable housing, et cetera, work, and how these things may be different than what they're experiencing now in regards to payments, expectations, and other things.

Then also, understanding and explaining the housing market. If they are planning to move to a new home, what can they afford with a voucher? Where are the affordable units located? Think about their budgets and what might change. Are they receiving free or these kind of services or will they no longer have access to those free services? People often second guess our capacity even when we're functioning in a great place. A resident might not recognize how independent they are until the topic is actually raised instead out loud.

Other residents may function out of fear, like many of us do. Not only the full picture of what's on the other side of permanent supportive housing could be scary, but supporting residents and recognizing their resilience and growth can build that

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confidence. Tenants who appear ready to move on may still have fear of leaving permanent supportive housing. That it's important to know that fear is understandable. It should be normalized. No tenants should be pushed into doing something they don't feel comfortable.

Approaching the conversation with the Trauma-informed lens, it's important to acknowledge that for many individuals, permanent supportive housing might be the first stable housing choice they've had in many years. They are likely to have been burnt before by other housing situations. The trauma of those experiences may affect their feel about moving on. Motivational interviewing can be a powerful tool to help them understand their own feelings and weigh any fear that they have against the desire to move on.

We recommend that all permanent supportive housing providers offer regular motivational interviewing training to their staff. It's important to remember, as I said, that fear is understandable. It's okay. It's normal and that we can support folks in making the choice that's best for them. At this time, I am going to turn it over to my colleague, Ariana, to talk about the other component.

[00:28:39] Ariana: Great. Thank you, Johnna. If I could get control. Sorry, my computer is a little slow. Now, we're going to walk through how do we use assessments to effectively evaluate and address the next steps in identifying folks that are applicable or ready to-- not ready to, sorry-- instability, independent, and have the ability to move on.

You've been engaging them. You've been talking to them and now we need to define an assessment process that streamlines for the entire community or for your program. Really, that takes the three-step process, as Johnna went over, how we engage program participants. Ideally, we're doing that throughout the process, as you all have indicated in the chat. A lot of you are already doing that. Then the next step is then really assessing for their stability and understanding of moving on and really wanting to make sure that that's a standardized process and again as transparent as possible, as Johnna talked about earlier, really making sure that tenants understand exactly what that means, providers understand what that means and whoever the coordinating entity who's working on the Moving On initiative also is communicating clearly the process and expectations.

Then you need to screen for resource eligibility. If you're moving on, program is going to be attached to specific resources like housing choice vouchers, making sure that you're doing some pre-screening for that and referring them to those resources so that process can also be as smooth as possible. What does that look like? We're going to talk a little bit about that, but first let's hear from you all. What do you- in your experience, how do you think assessments can be helpful and also thinking how can assessments be harmful when they're not done right? You can put some of your thoughts in the chat, would love for us to share as a community on this call. What are your experiences with that for initial thoughts?



Yes. Thank you. They can be great for guided tools, help you understand where the client currently is at exactly, the other ways it's helpful, provides opportunity for discussion. Yes. It's a guide. It gives you an opportunity to start asking these questions. If you haven't already asked them, check in with them on some of these factors and resources, re-engage them, remind them of some of their strengths, helped change goals, help develop goals, and help you identify resources you may need to link them to.

Excellent. Thank you. Yes. Keep your thoughts going. Does anybody have any thoughts about how they could be harmful if they're not done correctly or done appropriately? Yes, they can be intrusive. Yes, they can be used for the housing ready instead of housing first. We need to be careful about retraumatizing.

If they're not identified or structured correctly, they may not help us really identify the needed resources. Excellent. Keep your chats coming. These are great ideas that you guys are sharing. Again, as Johnna said, these training opportunities are a great way for us to learn from each other.

Yes, they can help. Great. Keep going. You guys are telling them-- may invite some feelings of abandonment, the fears Johnna was referring to. Absolutely. We're not going to leave you with that on how they can be harmful. Let's talk a little bit about some strategies and suggestions we have on how to avoid some of those harmful things, and also to reinforce what a lot of you already have said or are saying about how they can be useful. Really, assessments are supposed to be a transparent, standardized process. It should be as comprehensive as possible. That's really going to be key to helping you identify potential Moving On program participants.

The standardized assessment also helps this create a fairness to the process and objectivity around what it means to be a Moving On participant or what it means to partake or engage in the Moving On program. It's a really helpful. As somebody already said, it helps guide your discussions that you're having with your tenants. You can sit there and read it to them question by question, or you can just use that as a sounding board as you start-- if you want to have a more informal organic conversation with the tenant or resident about what Moving On is, reinforcing all the successes they've had to date, their strengths, and then further digging into if there are any additional needs or resources or support that they need so that we can guarantee that their time in Moving On as a successful one.

Is also really key to make sure we understand that we're meeting the tenants where they're at and that, for a lot of the eligibility requirements that are in a moving on program, or to get them access to resources that are necessary for them to sustain their moving on units or replacement is really making sure that they understand that tenants cannot reenter PSH. The way most of our systems are set up, it's set up in a way that, if they are not successful within that new permanent placement, they would have to start again from scratch in terms of if they do have to reenter the homeless system.



Really want to make sure these assessments are really giving you the information and the tenant information they need to make a really informed choice so that they can maintain their housing stability if they do move on and are no longer receiving the services that they're currently receiving. It's really key to make sure that our assessments are actively doing that, but also, as Johnna was talking, that you're engaging them, that you're addressing all of that and any of the fears that come along with that. Again, making sure that it's standardized. As many of you alluded to before, we should not be using these assessments as a way to screen out or restrict people from accessing Moving On programs or resources.

It's not as a way to say, "Never mind, you're not eligible. Moving On is no longer an option for you or these services are not applicable." We definitely don't want to use it as a way to label folks. Really, again, making sure we're coming from that person-centered trauma-informed approach to help us manage that is really going to be key.

Let's talk about a couple of the major components that assessment should have, a real robust Moving On, assessment will consider multiple areas and key things to think about is housing stability, their ability, have they proven that they have the ability to pay their rent paid on time, and they've shown consistency with that along with all their other utility bills and payments. Are they in a position where they've shown for significantly the time that they haven't had any major lease violations and they have a history of tenancy.

They've been with, within the PFH or within your program for significant amount of time to show that they are able to maintain housing. We also want to make sure we're looking at their finances, again, that they're paying their rent, but also that they're able to meet all of their other needs. Looking at any kind of income or budgeting tools you can utilize to show that they do have enough income to pay for the bills and/or access to resources to help supplement their rent when they do move on to a more permanent placement and they're no longer getting some of the financial assistance you may be providing them.

You're going to need to assess their credit as many of the resources connected to Moving On may be looking at that, or if they are transitioning out of their current environment, new landlords are going to want to know some of that information. Then the support services, either they require no services or minimal services now, or you've seen something very successful in integrating within community services and they know how to access those services and they've got a solid foundation in doing that. Either one, the idea is that they are able to successfully manage and support any of their additional need on their own or it was very minimal support. Because again, they're no longer going to be getting some of that support once they move on. Understanding that they're clear on that the provider who is currently working in the support service for is currently working with them is also clear on their ability to do that is going to be key.

What do we do if that your assessment, you're using a standardized assessment and it's suggesting that there's still significant areas that the tenant needs to work on or

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can improve on before it's clear that they would be successful in moving on, again, wanting to set folks up for success because we do not have a backup plan often, or do not have a safety net for them, really making sure that this is a great guide, as many of you said to then target how you work with that individual moving forward to help. It can help you develop an ongoing plan and target your case management around some of those needs that were identified.

Again, if we're framing this as an opportunity, then you can also use those areas of need or those areas of opportunity for improvement as a way to engage them in understanding how they can access additional services, work on these areas and reshape some of the goals that you've already been working with them on. Again, we really want to make sure we're not framing it as a failure. This is not a pass fail type of exam. It really is just helping us understand the resident where they are, their current abilities and any ongoing needs that they have.

If it's gone going and you're engaging them, as Johnna nicely outlined before, this is just another tool to help you do that. It's not labeling them or there's no pass, fail or grades going on. It's really an ongoing process to help you identify folks at the right time to refer to Moving On. Again, it needs to be client-centered and really focused on support services. Really, again, just making sure that you reiterate any opportunities or needs that right inside, how to have the client prioritize them, where does that fall in line with their overall goals and how they define what it looks like for them to thrive and making sure that you're really targeting those support services around all of that.

Again, we want to make sure that all of our assessments are really looking and strategically and consciously looking at it through a racial equity lens. Some things to consider, we're making sure we're training our staff on bias and structural racism. Any staff member that's going to be engaging in these assessments, again, we want to make sure that we're training them so that they are constantly aware of their conscious and unconscious biases in approaching this work from of cultural humble place. Also, want to consider constantly reviewing their data. We're using that continuous quality improvement process to make sure these assessments are working and there are no trends that show any inequity or bias through delivery or through the tool itself and really critically and evaluating all the data that comes through in any trends that are identified.

Again, if we're using a transparent standardized process, hopefully, this will help us remove some of those possibilities of bias but we constantly need to be re-evaluating and looking at the data to ensure that. Then again using the ongoing process, engaging tenants, engaging people with lived experience, providers throughout the process to constantly also get that qualitative feedback and input to make sure it's working as it's supposed to and effectively working especially as we're looking at the people who were referring Moving On participants too to make sure on there and they're also not seen any racial disparities is going to be important.



We do, and I saw some questions on there in the chat about examples. We do have a couple of examples of assessment tools that have been used. One is the Connecticut Supportive Housing Acuity Index that was designed really as a matrix of areas to really assess individuals and has been used as the basis of their assessment tool for their Moving On programs, other communities, several communities that you can see listed there have also been using it.

This tool is really designed as they described it to collect the information that assists tenants and service providers in creating plans that strengthen housing stability, promote independence, and improve the tenant's quality of life. This Acuity Index really assists the tenant in developing a comprehensive plan for their life that includes goals that are meaningful to him or her, or they, and reflects their aspirations and allows tenants to explore options beyond their current placement in permanent Supportive Housing. Again, that's a great tool that will be included in the materials at this webinar.

We also have an example from Miami where they use the Moving On tool and assessment. It's another tool that was created by their CoC in conjunction with Supportive Housing providers with collaborative process and really that tool also helps include some eligibility thresholds for a range of areas that program participants need to meet in order to apply for the program and really helps them identify applicants for Moving On.

We also have examples from Returning Home Ohio, another program that created a tenant status evaluation, which they actually use, as some of you have shared, completing it at regular intervals while program participants are in Supportive Housing to help them identify when they are in a place where it might be appropriate to refer them also to Moving On program. Again, just some great examples for you all to consider that will also be with some of the materials later on, and again, in the links shared in the chat.

Again, just really making sure that we're thinking about these assessments and conducting them with that trauma-informed approach. When we're doing these assessments, it's really important that we're thinking about this, not trying to reach traumatized folks as many of you indicated in the chat too, so really need to be sensitive. It's really important that the assessor is sensitive to the tenant's past trauma and the more willing the tenant will be able to connect to the assessor and tell the truth. We really want to get honest responses because we really want to make this an effective and accurate assessment of where the tenant is at, their abilities, their strengths, and any other ongoing needs that they have.

Making sure we do that using these principles of trauma-informed care. What does that look like when it's tenant empowerment? We're framing this assessment as an opportunity for them to move on to have greater independence and thrive and be successful in a less restrictive setting. We want to make sure that we're emphasizing throughout the assessment process that there's choice. They have the choice to participate in Moving On in the first place, but they also have a choice on what that

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looks like in terms of if they do need to find a new unit in the location, neighborhood, et cetera.

Again, it needs to be collaborative so we're working with the tenant or working with residents on this. It's an ongoing process. It really should be done in partnership. We again are constantly being aware of how power dynamics are at play. As Johnna talked a little bit before too, making sure that they understand that you're there to support them, the service providers' there to support them throughout this process and help them complete the assessment but it's really their job and it's not us telling them what they need to do or telling them what they should or should not be saying. The more we're aware of that throughout our work with the tenant, the more helpful that is.

Then also, ensuring that we focus on safety, they feel safe about moving or they feel safe about even discussing some of these things again and then trustworthiness. Again, if we're building that rapport, work really coming from a trauma-informed lens, we want to maintain that trust. We need to be honest about what this process looks like, transparent about what it looks like, how long it may take, additional information and documents that they'll need to collect over time. Again, giving them all that upfront making sure we maintain that trust and there's no surprises with them.

Speaking of other things that they may have to do as part of the process, let's talk a little bit about what the application and referral process might look like. Again, we want it to be clear and transparent. There is going to be an assessment as part of it to identify who is ready and wants to be referred to Moving On program but then we also need to look at other materials and other documentation that's going to really make this an efficient process when we do eventually refer it to the coordinated entry or to the resource holders such as the PHA. Sorry, I can't talk.

Again, so we want it to be clear. The application process should be collaborative. In filling out the assessment from a collaborative approach, we should also be discussing what other information and documents we'll need to collect that is part of this process. As Johnna said, if you're following that model, if you have checklist, if you have a visual guide that talks about the timeline and the various things that will be needed throughout the process that's going to be helpful to share with the tenant and with service providers so they can walk through that.

We have some examples of what might be included in the application, something that indicates that the tenant is able and interested to move on that may or may not be the same document as your assessment. You want to look at something about screening for eligible resources, which we'll talk a little bit more about what that looks like as well as any applications if that's applicable and if that's a part of your overall Moving On process as well as any referral forms to other resources and additional supports that they may need as part of the process.

Again, a program agreement consent form similar to other programs that we operate thinking about what that would look like in those application forms. If you support

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native entry you want to make sure you have those if you're referring to that coordinated party or coordinated organization making sure you understand what all of those are so you can work in conjunction with the tenant to fill those out. Make sure they're filled out completely so we are really getting all the information upfront as much as possible.

For screening for resource eligibility, Moving On initiatives that do have targeted resources, like housing choice vouchers or other public housing options really want to make sure that your assessment does include some of that criteria in there. One key thing or a good thing to consider is making sure that your assessment includes some of the criteria that would exclude them from accessing those resources, so understanding if anyone in their household is a part of the lifetime registration on the sex offender registry, if any member of their household is convicted of manufacturing methamphetamines, I can talk, on premises of federal housing knowing that those are exclusionary criteria. We need to talk about that upfront and understand that right away because that is going to prevent them from being able to access those resources and that's going to redirect what this moving on in the conversation looks like.

You also want to screen for resource eligibility. Knowing what housing choice vouchers, including mainstream vouchers or other public housing options that are available in your community or connected to your Moving On program. You also want to include some of those factors in either the screening process or a part of the assessment process to understand. Again, common things to look at, do they owe a debt to a public housing agency or are there any arrears anywhere, and if they do are they able to get assistance to help pay that off. Then also looking at their overall household income, are they meeting that 50% income threshold to make sure that, again, they are eligible for some of those other resources is going to be key.

Then thinking a little bit more about what that referral process will look like if we can try to make that a streamlined process is really going to be the most beneficial to everyone involved from the participant to the housing provider, to the coordinating entry body and to the referral body too as your PHAs are receiving these direct referrals. Again, maintaining that, keeping it transparent, having visual guides, checklist, anything that you can provide to make sure that it's clear, or you can access, is going to be really important.

Sometimes, the application process includes all those materials, so you're working with the participants, the service provider, and they're completing all this information. They're completing any kind of applications for a voucher or public housing assistance

altogether and giving that to the coordinated entity. Other times it may be that you're collecting some of that material, initial application material, and then receive a referral from the coordinated entity that gives it to that specific PHA or resource holder. That's where they make that application.



Either case, again, we want to make sure that as much information is gathered up front as possible. That these referrals are being conducted in a way that you're able to really identify which applicants are coming from a moving on program versus the general public wanting to make sure that the coordinated entity and the resource PHA or whoever else that's holding those resources that are needed for the moving on program are able to distinguish that and track moving on participants separately.

For several reasons, but more so just to streamline that process, but also so they can evaluate an ongoing discussion about how this referral process is even working specifically for moving on program. It's going to help streamline that process and really make sure that it's efficient and that you see movement going efficiently and they're not getting mixed up in other waitlists. Another thought on how that can happen sometimes with resources is when don't have a lot available in your community.

Then last but not least, also wanting to think about with that, how you can provide services and that ongoing support for residents in applying for housing assistance. If they are going to apply for vouchers or they're looking at private landlords, really just making sure that you have some type of housing implementation plan or ongoing plan or structure framework to work with the tenant on what that process is going to look like. Making sure they're collecting all the information that they have. Do they have their IDs handy and copies of their ID, copies and proof of income, benefits?

All of that, that we know is going to be needed for them to submit these applications should be ongoing and work in conjunction with providers or tenants to do that. Also really making sure that you're providing that housing navigation and support for participants if they do need to go into a new unit. This may include conducting housing searches with them, helping them in terms of filling out applications to specific housing and then preparing them for what that will look like, how they conduct viewings, coaching them on questions they may want to ask and talking to landlords and preparing them for any interviews landlords may want to have.

For some of those folks, they haven't done this in several years and they definitely haven't done it in an environment where they've got so much independence and in a different place in their lives. Giving them that reassurance and coaching as Johnna said, dispelling some of those fears, all of that can be done if you're really helping them and working in conjunction with them and preparing them for some of that so they feel more confident going into these interviews and doing these housing searches with you or on their own.

Then again, if you can support them in working with the landlord to negotiate the lease, understand the lease if it looks different than what they're used to, and then also ensuring that the lease-up process is as smooth as possible. Again, helping with any extra documentation and moving services that they may need to make sure that that is a smooth and timely process is going to be important. That is what it looks like. Now, I'm going to turn it over to Janis because I think we now have plenty of time for some questions that I see are popping in the chat.

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[00:53:39] Janis: Great. Thanks. We do have some folks who are working on the different answers to those in the chat, but we might as well just jump in and have some conversation here first. One of the questions that came in is around RAD conversions. Principal assistance demonstration program through HUD. How RAD conversions are impacting this concept and process. RAD conversions make some tenants available for tenant based vouchers. After a project is converted to RAD, that goes into either project-based Section 8 vouchers or project-based rental assistance.

Depending on which type that is after either one or two years, tenants will be available and will be able then to apply for a tenant based rental assistance like they would in any project based Section 8 voucher program. That gives tenants an ability to access that tenant based structure if they're interested in doing it without having to apply for a special moving on voucher through their particular housing authority. That just makes more resources available. We talked about project-based vouchers and conversion in the resources presentation, which was two weeks ago. For more information on that stuff, you can see that presentation.

Also there was a question about the vouchers and preferences. I'm working on pulling up this specific question right now. If PHAs are being encouraged to accept referrals for moving on over their local preferences. know what PHAs are being encouraged to do is to adopt a local preference for tenants who are moving on from supportive housing. That's something that we talked to them about in the moving on for PHAs session two weeks ago. It's not accepting referrals over their preferences, it's actually creating a local preference for moving on, which I know that some of the housing authorities on this phone today do have these preferences.

Another question that's come up is around if anyone is using a version of the SSOM as the assessment. I think that this is the self-sufficiency outcomes matrix that you're talking about. Is that right? Just if whoever put that question or whoever put that in. Yes. That's the self-sufficiency outcomes matrix module and it does look like some folks are using that regularly.

Okay. Other questions. Two questions have come in about what if our client applies for moving on, but they don't have those consistent rent payments or there are other challenges there with not demonstrating a level of independence that we think is important for moving on? I think Ariana talked some about this in terms of, there's this difficulty about the word readiness. As we think about what tenants are best positioned to be successful in moving on from supportive housing, is tenants are currently not making payments on their rent regularly. Then they move to a Section 8 voucher and they're not paying their portion.

They're at significant risk of losing that voucher and then losing their housing and then not being able to re-enter supportive housing. I think working with the tenants to help them see the connection. If they want to move on, this is something that they're going to need to do in order to maintain their housing stability and that you won't be there as a case manager for them when they're out in the community. Just trying to



help them understand these are the things that you're going to really need to be able to do in order to be successful after moving on from supportive housing.

Typically, that consistent ability to pay rent on time is a pretty critical piece for moving on. Really it's only because it's about success or after they leave supportive housing. Other questions that have come in. There's a question about screening or criminal background check being done by property managers as part of the assessment. This is a challenge here, as we know a lot of tenants, even with the voucher, struggle to find a housing that they can rent that's within their payment standard and because of landlord barriers that are put up.

What we don't want to do is screen tenants out of the moving on program based on the most restrictive criteria that we might see by some landlords in the community. We want to make sure that we are as broad as possible in who we are giving access to the program and the resources to and then working with them to find housing. It might be more difficult for tenants with some particular criminal background issues that come up with landlords.

It's about working with landlords to see where tenants are at now versus when those issues came up before. I think it's about making sure that we are not screening people out where we don't have to for the program. Lots of other questions coming in. One question about if HUD is considering expansion of supportive services done for clients who have moved on, so providers can continue to provide supportive services after moving on. Current funding does not support continuing services.

There is the ability to pay for aftercare services with your supportive housing funding. The idea for moving on is that the clients do not need continued services after, other than a short period of aftercare. Other than maybe connecting to community-based services, mainstream providers that they can access on their own. Clients who are moving on should not need continued housing-based supportive services.

Okay, looking at some other questions that are coming in. Some PHAs have strict occupancy standards, payment standards, well below FMR and tenants have to pay 40% or more of income. On a south, sure, they should not have to pay more than 40% of their income. They typically pay 30% of their income, and it should never be over 40% just by race for the program. I think the point here is that it's hard to make the case that a person on PHA should release their spot for Housing Choice Voucher. Absolutely, that's part of the conversation. What resources are available, what's going to make the most sense for the tenant at the time?

We're not advocating that tenants go into situations that are worse for them based on local conditions. I'm wondering if one of the other folks who presented can talk a little bit about aftercare and what's happened in your areas? Just seeing if you have any thoughts there for the questions here.

[silence]



[01:03:52] Johnna: Hey, Janis, this is Johnna. For Chicago, the aftercare is really-- Well, the conversation starts in the assessment period. For us, it's really connecting folks to those local community resources. Then also, we arm that responsibility with the Chicago Housing Authority to do the aftercare, to do the follow-up with folks. For us in the supportive housing sector as providers, we really emphasize connection to those community support as the important thing to pay attention to in that aftercare space.

[01:04:40] Janis: Yes, absolutely. I think that makes a lot of sense, those connections to the supports. For Daniel's question about it's only for transition, that can be provided with COC funds to my understanding up to six months afterwards for aftercare. It's really light touch. It is really not ongoing. It's about, like Johnna said, those connections to community-based supports.

I see someone saying that they have clients that can manage their rent and housing, but need case management to remind them to produce food stamps or insurance on an ongoing basis. It depends on what community you're in, and what kind of community-based supports are available. Sometimes there are different health case managers or other community-based services that can provide that. It really depends on what's available in your state and locality.

There's a suggestion here about a provider that's worked with insurance to provide aftercare retention and support. We've certainly seen that in some programs. Social work interns, and others can be helpful with that. We will talk a lot more about aftercare and services in our moving on services presentation. That webinar is going to be in a month from now. There's a question here about how a program would learn to prioritize moving on participants on the waitlist. We have a PHA moving on how-to guide that has a lot of information about how PHAs can go about creating preferences for people moving on, as well as how COCs can engage PHAs around that conversation. We can drop the link to that in the chat.

Okay, so looking at some other questions here around the clients who is a sex offender, but doing better than most clients, paying rent on time. He is not able to go into Section 8. What else is out there for him? This is something, also, if you refer back to our moving on resources section, we talk about a lot of the other different options that are available.

Depending on what level it is, this person may not be able to get into public housing or into a HUD structure, but may be able to access low-income housing tax credit buildings, or local rental assistance funds, or other kinds of programs there. Just take a look at the slides for that. The recording for the moving on resources section will also be talking about this more in the moving on services presentation, to talk about how to have those conversations with tenants about lots of different options.

Okay, I'm also seeing a comment here that finding agencies that bill Medicaid are big connections because they can provide aftercare and have a funding source for people with severe mental illness or disability. Absolutely, health partners are really

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key mainstream connection to make. What is covered depends on the particular state and the conditions for that specific person. That is something that can be available for certain clients. Here's a question about assessment, being in HMIS. I can talk a little bit about one assessment that's in HMIS, but then interested to hear from Johnna and Ariana about your experience with local assessments, and pros or cons to how they've been done logistically.

In Miami, they do have an assessment that is built into HMIS. They started with a paper form, and then they switched to HMIS, which has been really helpful because they've made over 400 referrals for moving on programs so far. Having that HMIS system that they can get the applications in, and then makes it easier to make referrals, keep track of everything, they're working with six different PHA partners. They just have a lot of vouchers and people coming through. That HMIS assessment has been really helpful in streamlining things and making it easier to see who all is in there and it's easier than going through a lot of paper forms. Any thoughts from Johnna and Ari about how the assessments have been done logistically in Clark County and Chicago.

[01:10:16] Johnna: In Chicago, we are still utilizing the paper form, and it seems to be working. Our moving on program is relatively small when it comes to the number of slots we have available. I was so really excited this morning because our COC is working to really try to partner with our affordable housing entities in Chicago to increase our capacity with moving on. There is some potential to put it into our HMIS system, but right now we're currently just using the paper.

[01:10:59] Ariana: I would say, we're also looking at in Clark County to following Miami's model in terms of wanting to keep it in HMIS for the same reasons, to streamline referrals. I think it also provides an opportunity to be able to do some of that evaluation and collect data to really assess how the moving on process is working. I think, for me, one of the downsides would only be is, thinking about who has access to HMIS and if you have other partners that you want to participate in moving on, there's still going to be that process. Like Johnna said, where you'll probably still have to print things and do it the paper way if not everyone has access. To me, that's the only downside I can think of or that I've heard providers discuss that.

[01:11:45] Janis: Another question here about when referrals are coordinated through the Coordinated Entry System, are the households added to the community queue or is there a separate priority list? Usually there is a separate priorities list for moving on when there is a waiting list, at least locally within the community. In terms for the actual Public Housing Agencies, you're on the same list. Depending on how the local preferences work, somebody may be pulled with a moving on person, one for every one with a different preference, or there might be a set aside of a number of vouchers and only people eligible for the preference for those vouchers are pulled.

Those might only be moving on households who are eligible for that preference. I'm not sure specifically what that question was around, or if it helps, but if that doesn't

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help, just clarify more about the question in the chat. Another question here about referrals is, is it best practice to only accept referrals when there are spots available or to maintain a waitlist? I think communities do both, but it's helpful to have people assessed and to see who's ready. It is usually helpful to have a waitlist, especially if you know that resources are coming.

If you have no resources available and no idea when they might be available, it's a little difficult to maintain that waitlist, you don't want to create false hope or expectations that there will be resources there. That's a balance in your community, but if you anticipate that more resources will be coming available, it's good to have people queued up. What you don't want to do is pay a preference with your PHA open, and then you start assessing tenants and you don't have enough to send them. You want to really have that ready when those spaces are available.

[01:13:59] Johnna: I think one thing we learned, too, in Chicago around the internal waitlist is having transparency in a PHA. Folks want to know they are used or have a historical experience with there being waitlists with the affordable housing entities. If we are creating one specifically for the carve out for the moving on program, we want to make sure folks are clear and understand where they are on that list, because that's always been a huge issue for folks dealing with affordable housing entities, particularly in Chicago.

We had to really figure out what that looks like. We want to present it to the folks that are on the waitlist, but also protect the identity and human entity of other participants. We had to play around and figure out what works. We have an internal waitlist that we keep in our moving on program, and then we give updates and folks are moving up on that list but still protecting the confidentiality of the other participants.

[01:15:10] Janis: Great. Another question here about as communities are moving to dynamic prioritization and seeing higher vulnerability clients in Rapid Re-Housing, what about doing an assessment for Rapid Re-Housing? There is someone who's put a link in here to inspections that they do. I will say this is a conversation that communities are starting to have. A lot of times partnerships with public housing agencies cover a lot more than just moving on. There are also preferences for people experiencing homelessness. People moving on from PSH and also households who are moving on from Rapid Re-Housing, can be included in a moving on and type preference if that's the way that the PHA breaks it.

I'll say that the conversations around assessments there, it's really different for PSH and Rapid Re-Housing. In some ways it has to be a different kind of assessment because in PSH, someone already is guaranteed that space. They can have it and have that affordability and the services for as long as they want and need them. In Rapid Re-Housing, you have people who could time out of that program and then end up not being able to maintain housing stability and reentering homelessness. For PSH, you're looking for the most stable tenants who are already demonstrating that level of independence. They are paying rent on time. They are accessing community-based services, they're your most stable PSH tenants.

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That's what's going to really assess to be positioned well for moving on with Rapid Re-Housing. If you're thinking about people moving into vouchers from there, or public housing, your assessment really needs to look at who doesn't need ongoing services, but really is going to be at high risk of reentering homelessness without the affordability component. It's certainly conversations to have, but I think that the assessments will look a little bit different and you'll be looking for a different kind of tenant. Any other questions from folks before we wrap up here?

[pause 01:17:42]

[01:17:55] Janis: Okay. I'm not seeing any right now. I'm just going to move on quickly to some resources here and we've put all the links for these in the chat. You can access these later. The next session in our training series is going to be about, *Creating a Culture Supportive of Moving On*. This is really going to focus on how do we shift where in some places we do have this culture work permits port housing is the final stop, or this is just the end goal for people. How maybe tenants are unaware that they could move on from PSH or resources haven't been available.

Conversations are not being had with participants about their future outside of PSH potentially. We're going to talk about creating that culture. What culture supportive of moving on is, and is not. We'll talk about some bits of the services there and just thinking about long-term, which we'll cover a little bit more in depth also on some of the engagements that we went into today. That will be in two weeks from now and same target audience as for this webinar, which is our COCs, our PSH providers including HOPWA, VASH providers and housing and services folks.

Then just as a reminder again, put on your calendars as May 26th for the moving on office hours. We'll have the link to the registration or the link for signing in available, hopefully, by our next training session. For right now, just save the date if you're interested. I see we've dropped more of the links into the chat for those different pieces. Thank you so much. If you have any other questions, we'll be back here again in two weeks and we'll have this bit posted as soon as we can. Any last thoughts from our trainers, from HUD, anyone else before we wrap up?

[01:20:18] Johnna: Thanks for participating today. Hope to hear from you next time.

[01:20:24] Ariana: Thank you. Have a great Wednesday.

[01:20:29] Janis: Thanks, everyone.

[pause 01:20:30]

[01:22:19] [END OF AUDIO]