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[00:00:22] Janis Ikeda: Good morning. Welcome everyone to our webinar today Moving On Resources. This is targeted to CoCs and PSH providers. It's the second training in our series of Moving On webinars. It's all focused on the resources that you can use in your community to build a robust Moving On initiative that helps people who are in supportive housing and no longer need the intensive services to transition out to affordable housing without site-based services.

Thanks, everyone who's joining in the chat. I just want to move on here to a quick housekeeping slide. We're going to have a recording of today's session available along with the slide deck and other resources within a few days. We will post transcripts as soon as they're available. Noting a comment about not being able to hear me. Are other folks able to hear me?

[00:01:30] Emma Chapple: We can hear you, Janis. I'll work with the person individually.

[00:01:34] Janis: Great, thank you. If you are having trouble, you can join the webinar by phone. Also, I just want to make a note here, it looks like most folks are able to use the chat right now, but if you're having any issues with it just click that little chat bubble icon, make sure that the Send To field is all participants. I know we were having some troubles with this last webinar.

We have it fixed now so everyone can see everyone else's messages, and then just click send, and then we'll all be able to see you. Thanks so much to all the folks who are introducing themselves and where they're from in the chat, we'd love to see more of that. That's great, so feel free to just send a hello and your name and where you're coming to us from. I just want to quickly clarify that if you are a PSH provider, you do not need to plan to attend tomorrow's training.

If you provide supportive housing or you're a CoC, this is the training for you. The one tomorrow is really focused on PHAs multifamily operators, and other affordable housing operators on what they can do on their end to make resources available, so if you're a PSH provider, you're in the right place today. We're going to have a couple of panelists speaking to us today on this topic.

Really excited that Jeremy Nichols, Deirdre Bolden, and Lindsey Bishop Gilmore from CSH are coming to us. All of them have experience working with communities around Moving On and have some great topics to discuss. I'm also really excited that Victoria Mallette from the Miami-Dade County Homeless Trust is going to be joining us. They have one of the most robustly resourced Moving On initiatives in the country, probably the most robustly resourced initiative, so really excited to hear more about that.

Just a quick reminder, if you were not on the first training two weeks ago, that this is part of a series. We did our introduction to Moving On training on March 3rd. We're

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doing this resources one now. Number three tomorrow is really for the PHAs and other housing operators. Then continuing on, in two weeks, we'll have one on assessment and referral processes and then a few others on culture, services, and outcomes and tracking upcoming.

You can register for all those in the same place that you registered for this training through the LMS. Now I'm going to turn it over to Jeremy Nichols, who's going to walk us through some of the pieces for today and some Moving On basics.

[00:04:33] Jeremy Nichols: Thank you so much, Janis. First off, can everyone hear me okay?

[00:04:40] Janis: Yes.

[00:04:41] Jeremy: I want to echo Janis, super excited to be here. This is a jam-packed training full of great resources. I'm going to dive right in, just a quick overview of the agenda here. Janis already covered the training series as a whole. I'm going to walk us through some brief Moving On basics, just to do a little bit of level-setting and then I'll hand it over to my colleagues, and we'll touch base on key resources, run through a great resource called the Resources Inventory Tool.

Then we'll hear from Victoria, and then we'll cover how to go about building and formalizing partnerships, and hopefully, have a really robust Q&A session. I do want to just make sure we're all clear, our goal for today is that out of this training, that you'll be able to outline the key types of resources used in Moving On initiatives and the most common sources of funding. Learners will be equipped to use the HUD Resources Inventory guide to assess potential sources of funding and how to really get your Moving On initiative off the ground.

Also, we really want you to leave this session being able to be prepared to engage PHAs and show them the real value of the Moving On Program. We're going to do a quick poll. Tenants living in permanent supportive housing often don't need PSH because they have no other viable options for stable permanent housing. The Moving On Initiative really pulls together partners from across the system to create more housing options for tenants in supportive housing.

A successful Moving On Initiative requires coordination from multiple partners to make that successful. On the slide here, we have a list of the partners that are often included in a Moving On Initiative. I think we're able to launch a quick poll, just to get a sense of who's all on the call. Are we able to launch that right now?

[00:07:00] Emma: Yes, launching right now.

[00:07:02] Jeremy: Awesome.

[00:07:08] Emma: We'll wait a minute, for everyone to read all of the options and select their answers. Thanks so much for participating.

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[00:07:18] **Jeremy:** This is really where we should have some poll music while we wait, to fill the awkward silence.

[00:07:27] **Emma:** I'm not singing, Jeremy, you're going to have to do that.

[00:07:31] **Jeremy:** No one wants that.

[00:07:36] **Emma:** Closing the poll.

[pause 00:07:38]

[00:07:56] **Jeremy:** Are you able to show? There it is. Great. We've got quite a lot of PSH providers on the call, CoC leadership, some public housing authorities, great, local-- a real mixture of folks, that's awesome. That makes sense. This is the training for housing providers, so we're really excited to give you the tools to move forward. Quickly, we're just going to do some level-setting with Moving On basics.

If you'd like more information on this specific section, we will be uploading the materials for our previous intro session we did two weeks ago, and we will be able to send that out. The primary goal of Moving On is to support independence and choice for those ready and who desire to move on from PSH. Other names you might hear locally from Moving On include move on, move up, moving up, step up, FLOW, a great acronym for flexibility, livability, outcomes, and wellness.

People get creative. You hear a lot, but in general, we're just going to go ahead and call all of those programs Moving On. Although PSH 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. Rent is expensive anywhere in this country. We all know about the affordable housing crisis.

Moving On programs enable these tenants to move on by connecting them with affordable housing, other financial resources, help provide transition support to set them up for long-term stability. In some but not many cases, tenants may not even need or be eligible for affordable housing but could still benefit from, say, some financial or transition support to ensure they're set up for long-term stability once they move.

For some tenants, Moving On will involve a physical move to a new home, in other cases, it might be what we call a transition in place arrangement where the services move to another tenant while the Moving On participant remains in their current housing with a new operating subsidy. What resources are needed here? A robust Moving On initiative includes a range of activities and costs that usually require resources from a wide range of partners.

Some such as affordable housing usually come from partnerships with groups such as PHAs or HUD multifamily operators who can offer Moving On tenants special

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access to resources. Some activities can leverage from existing resources such as a tenant's PSH case manager helps provide them with transition supports or maybe you partner with another agency that can offer free financial management and credit-building services.

I think of when I was a case manager, we leveraged local banks that had a corporate philanthropy department, and they would come out and do trainings for our residents and clients. Other costs, flexible financial resources that might require cash will come from maybe private funders or local government sources and thinking about the help to get to a furniture bank or get the deposit help covered and things like that.

Great. We're going to briefly cover housing destinations for Moving On tenants. We're going to go much more in depth about the housing resources. I'm going to save that, but I'm going to briefly cover the housing paths that different tenants may take. Their ultimate housing destination after Moving On, it's going to depend on a number of factors, including what resources are available to them through the local Moving On Program, maybe what they're eligible, given their current living situation.

Here are a couple. Let's just walk through a couple. One is going to be, I referenced transition in place, the tenant remains in current housing but with a new subsidy. This typically only applies to scattered-site, or you might hear it referred to as cluster or multiple-site tenants. Another path, a tenant moves to a private-market unit with a tenant-based voucher. A tenant could also maybe move to site-based affordable housing.

This could be public housing, multifamily property, Low-Income Housing Tax Credit building, those kinds of places. This is rare, but tenants move to a private market unit without subsidy. There are some tenants who, through employment or other means, have, all of a sudden, enough income where they're able to afford market-rate rent without assistance. Then another option that we do want to bring up because it does happen or is something that is a long-term goal of many of the people we serve, potentially, a tenant moves into their own home, maybe supported by the HCV homeownership program, Department of Veteran Affairs, the home loan program, the in-home loan program, guarantee program.

These are all ways that the people we serve can move into the goal of homeownership if they so choose. Potentially, the homeownership comes after their first move of them Moving On within that supportive housing unit and into maybe affordable housing [unintelligible 00:14:13] services. I also want to touch base on one key component here that was identified when CSH conducted a number of focus groups with individuals who had gone through the Moving On process, and that was peer support.

Almost everyone identified that this was a key aspect that should be included in all future Moving On programs. I want to read this quote. "Having people with lived experience available for people to get information from is so important. Testimony and experiences of someone who has gone through this is so valuable and so

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important." I think that is a great way to really help bridge this period of transition that can be quite intense or nerve-wracking for tenants.

They can help complement case managers and help participants navigate all of the various steps of Moving On. I also want to walk us through some racial equity considerations. Just so we're all clear when I refer to racial equity, I'm talking about the condition that would be achieved if racial and ethnic identity no longer statistically predicted outcomes such as rates of homelessness, health outcomes, life expectancy, justice involvement, et cetera.

You really should look at building a Moving On Program with adequate resources that works in partnership with Black people, Indigenous people, and other people of color to identify what resources are needed in order to help tenants move, successfully, on. Again, including those groups in the leadership process, in the planning process is really key. In a way, I think about that in terms of when I say, build a program with adequate resources.

On a structural level, hopefully, we're all familiar with just the fact that housing policies historically have discriminated against people with previous evictions, with justice histories, and this has had a disproportionate impact on people of color in a way that this could work on an individual level or with folks who are within a program, as we know that a BIPOC person holding a housing choice voucher may face more discrimination from a landlord than a White counterpart.

How do we build in housing navigation services that are going to work to address that fact? Maybe they're more in-depth or we allow for a longer period of time for the housing navigation process to identify a unit. Because these are structural barriers, these are not an individual's lack of trying. This really is an external factor that our programs need to address. All right. Now, I'm going to turn it over to my colleague Deirdre right here. Let me pass the ball real quick.

[pause 00:17:44]

[00:17:58] Deirdre Bolden: Thank you, Jeremy. Can you hear me?

[00:18:00] Jeremy: Yes.

[00:18:02] Deirdre: Perfect. Well, good afternoon, everyone. I, as well, am very excited to be with you and to be participating in this important discussion. As you heard, Moving On programs provide a critical layer in a community's housing portfolio for individuals to transition along and up the housing continuum. It allows those who have demonstrated stability in work and income to move into independent living.

In turn, it frees up those valuable PSH housing units that allow others to transition to permanent housing or transition from homelessness. I'll be sharing some key housing resources that are very prevalent for Moving On programs. It's important to

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understand that while there may be some tenants who enough income to move into market-rate housing similar to what Jeremy was speaking of without subsidy, this is not the case for most tenants who want to move on.

For this reason, joint planning Moving On initiatives must work to ensure affordable housing resources are available in their program. Housing choice vouchers, which also include mainstream vouchers, are the most common resources used in Moving On, so we'll spend a lot of time talking about them today. As an easy reference here, we wanted to help you identify where existing affordable housing properties within your specific jurisdictions are located.

You can use that HUD Resource Locator link to identify that. First, we will focus on the multifamily housing and Low-Income Housing Tax Credit properties. Multifamily housing is affordable housing where a private property owner receives HUD funds in exchange for making some or all of the units affordable for low or moderate-income households and, in some cases, for the elderly or people with disabilities.

Some examples of multifamily housing include Section 202 and Section 811 housing programs. With these types of affordable housing, light-touch support services are also provisioned for the elderly within the 202 program and for the very low and extremely low-income adults with disabilities in the HUD 811 program. Within both housing admission protocols, multifamily property owners can amend their unique tenant selection plan to include a preference for Moving On tenants and/or people experiencing homelessness.

Here we offer, again, an online resource that we hope is helpful to you. It is a toolkit for implementing a homeless preference within multifamily housing. The Low-Income Housing Tax Credit program is another affordable housing opportunity, which incentivizes the creation of affordable housing by providing the developer with tax credits in exchange for ensuring that a portion of the units within their development are dedicated to and are affordable for low and moderate-income households.

The tax credit units are deemed in those that apply or deemed eligible based on their income, and the rents are set based on their income. Similar to multifamily developments, the tax credit properties can also create set-asides for tenants Moving On from permanent supportive housing and/or people experiencing homelessness. In addition, Moving On tenants who are eligible for Low-Income Housing Tax Credit units, including those that actually have housing choice vouchers, can't apply directly to those properties.

Many tax credit communities do typically have waiting lists. For tenants who have too much income for the Housing Choice Voucher Program or otherwise don't qualify, getting on the waiting list for these affordable housing properties may be a good option, and because the waiting list can sometimes be long, tenants may consider signing up even when they're still not quite ready to move, but they can get themselves on the list.



Once again, we are happy to provide a direct link for future reference of the tax credit programs that exist within your community. Most of us are very familiar with public housing agencies, but I will stipulate that they are, of course, state, county, municipality, or other governmental entities, or public bodies who are authorized under state law to administer a housing or rental assistance program.

There may be one PHA in your geographic jurisdiction, or there may be several. There's a link here that gives you the information around those PHAs. Key resources that local public housing authorities may administer include the housing choice vouchers, public housing, as well as project-based vouchers, and mixed-income properties. Not all public housing authorities manage each of these resources, and some manage other types of funding programs.

I'll talk now just a little bit about housing choice vouchers and some of the eligibility requirements. Housing choice vouchers or more recently, the mainstream vouchers, as I mentioned before, are most often utilized in Moving On programs. They are administered by PHAs and provide the rental assistance for the low-income families who typically pay only 30% of their income toward rent and then the PHA pays the remaining rent portion up to a designated local payment standard for the specific housing market.

Regular housing choice vouchers are, again, for low-income families. We'll talk about the eligibility on the next slide. Mainstream vouchers are special types of housing choice vouchers with additional requirements that a household consists of one or more non-elderly disabled person between the ages of 18 and 64, one with a disability. As long as there is one eligible member, then the household may include additional members who are not non-elderly disabled individuals.

The non-elderly disabled voucher is a special type of voucher that some PHAs maintain allocations. They principally serve, however, the same eligible group as the mainstream. Then finally, again, public housing is site-based affordable housing and does not typically have a great amount of turnover in many communities. However, whenever that turnover does occur and vacancies come within a property, the public housing authority [unintelligible 00:25:49] continuums of care and the community can advocate and consider using a move-on preference to fill those public housing units.

In terms of eligibility, local public housing authorities typically have designated staff that assist with the application to their Housing Choice Voucher Program. The administrators handle processes related to issuing those vouchers that range from the initial eligibility determination that includes basically the verification, of course, of legal residence, conducting criminal background screening, obtaining the pertinent documentation for all of the household members.

They take the applicant through the latter processes of determining and calculating rent portions as well as the inspection of the units all the way to, of course, the final lease signing with a landlord. A key application component that ensures the

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applicant is eligible is to ensure that they meet the income requirement. The applicant's total household income must not exceed 50% of Area Median Income threshold for their household size.

These are published annually by HUD and available on the HUD website. For some PHAs, they may lease up to tenants who have incomes up to 80% AMI, but that is not a very common situation. As Jeremy mentioned a little bit earlier, all those clients come with a unique set of backgrounds as a result of their transition from housing instability, with the Housing Choice Voucher Program, clients are expected to meet the same standards as all other applicants.

It's also very helpful for service providers like yourself to assist their clients with moving on through the housing application process, maybe even attending their voucher briefing sessions with them to ease the feelings of apprehension or confusion and really to support them through this next important phase of their personal journeys. Finally, it is important to acknowledge that not all tenants who wish to move on will qualify for the Housing Choice Voucher Program, and even some who are eligible may wish to pursue different sources of affordable housings.

When tenants choose or express a willingness to move on, the choice mobility options that are presented here are some additional possibilities that case managers can explore or with their tenants. Permanent supportive housing program participants may live in housing that is funded with the Section 8 project-based vouchers. With Section 8 project-based vouchers, after the first year, tenants actually had the right to move with continued assistance by requesting a tenant-based housing choice voucher or comparable tenant-based rental assistance.

If a voucher is not available in the community with that housing authority, then the household will be given priority to receive the next available voucher. Another option is when the right to move with continued assistance applies to tenants in units converted to project-based Section 8 through what is known as HUD's RAD Program or the Rental Assistance Demonstration.

Here, residents are eligible to apply for tenant-based assistance in these projects after either one or two years, depending on the type of conversion. We do want to make note that these types of options are only available for residents that are residing in Section 8 project-based voucher units, not [unintelligible 00:30:01]-based units that are funded through other operating subsidies. Now, I'm happy to turn it over to my colleague, Lindsey, who will share information about a really helpful program resource: the Resources Inventory Tool. Lindsey.

[00:30:19] Lindsey Bishop Gilmore: Can you hear me okay?

[00:30:20] Janis: Yes.

[00:30:24] Lindsey: Awesome. Thank you. Hi, everyone, good morning, good afternoon. I'm excited to be with you guys today, as well. As Janis said, my name is

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Lindsey Bishop Gilmore, I am in the Michigan program at CSH, and I'm based in Detroit and have had the great opportunity to work with a number of communities on moving on, moving up, FLOW, all of these great names that local communities have created, so I'm excited to share some of that with you guys today.

I want to first start with highlighting a tool that HUD has created recently that's part of the Moving On tools. It's a resource inventory tool that is designed to help you inventory all of the resources. All of the great resources that Deirdre just walked through are included in the tool to help you understand and think through what is available within your local community as you think about moving on.

As part of the tool, there's also this really great and helpful three-page overview. It's a pretty simple three pages that explain how to use the toolkit. As you can see on this screen, this is an example of one tab within the toolkit that's focused on the housing resources inventory. The inventory tool is a Microsoft Excel document that is really designed to help make it easier for you as Moving On planners in your community, whether you're the CoC or supportive housing providers, permanent supportive housing providers, so identify the resources that you can use locally.

As you can see, it's predefined with options that you should explore in your local community. Some of these may not apply to you, so we encourage you to look at them, delete, edit, add to whatever makes the most sense for you locally. We encourage you that the tool is completed by an inclusive group of stakeholders within your community and that you first, before diving into this tool, take a look at the project planning template tool that I think was highlighted within the last session, to guide you as you start to dive into this tool a bit more.

Within this tool, there's two different tabs. The first tab is the housing resources inventory tool that you're looking at right now that outlines, what are the resources within your communities to create affordable housing units for folks to transition into? Then separately, there's another kind of resources tool that explores some of the other things that you would need for your Moving On project.

As Jeremy highlighted, in addition to affordable housing units for people to move on to, it's really important that you think about, what are the other resources to operate a high-quality Moving On initiative. Some of those funding resource needs that we've identified are things like flexible financial resources. Tenants may need security fees, security deposits, first month's rent, the cost for movers, so identifying, are there local flexible resources that you could utilize?

The second piece that may be needed is around services, what are the resources that you can utilize to help support permanent supportive housing program participants to prepare their application materials, get all of their income and documentation requirements together, financial budgeting to prepare for what happens after moving? The other important piece that I think we've touched on a little bit is the housing navigation piece, especially for folks that may be transitioning



units so they're not going to transition in their own existing unit, but they're going to be looking for housing outside of their unit that they're currently in.

We know that housing search can take a long time, it can feel really overwhelming, so resources to support that housing navigation are equally important. Then the other piece that we highlighted is just around aftercare. We know, also, that moving can feel really difficult and can bring up challenges in someone's life, so being prepared to provide those after someone moves is really important.

This resource inventory tool walks you through how to think through, what are the resources in your community that you can tap into? Then the last important other resource to think about that we're going to talk about in a few minutes is around coordination at a community level. As you're bringing all of these partners together and perhaps your public housing authority or Low-Income Housing Tax Credit projects, there's going to have to be that local coordination to bring everyone together, to facilitate and manage that inner agency communication.

This tool can help you really think through that and then also if you'll notice on the columns to your right, as you're engaging with partners, keeping track of that communication and next steps. That's it, it's a really great tool to walk you through, what are the resources that are available in your community? In the project plan template, which was discussed in the introduction session, there's some tabs with a basic question that can really help your planning team start to think through, what are some of the resources that are available within your community?

These are some of the questions that are there that we encourage you all to think about. How many site-based and scattered-site units do you have within your community? For example, if you have site-based and they are tenant-based housing choice voucher units, as Deirdre just explained, there might be an opportunity to take that voucher and move somewhere else within the community if they've been there for a certain period of time.

Exploring, how many projects do you have that have tenant-based units, that have Section 8 project-based vouchers aligned with them? How many housing choice vouchers are there in our communities? As Deirdre aligned, you may have multiple public housing authority that covers your area, so exploring, what are all of those housing resource vouchers that are available?

Are there any public housing units within your community that have lower vacancy rates? I know in some of the communities that I've worked, that some of the elderly public housing units have a lower vacancy rate, so there may be an opportunity to partner with public housing authorities to make Moving On referrals to those units. Then, perhaps there are public housing authorities that already have a homeless or Moving On presence within your community.

It's exploring that, asking those questions, and then are there any other affordable housing buildings or units that exist in your community? Are there Low-Income

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Housing Tax Credits that maybe have lower vacancy rates that you could partner with? I know that that's one thing that I had experienced in one of the communities that I've worked, where several projects did have lower vacancy rates that had a hard time identifying tenants to meet their eligibility and income criteria, so perhaps there's an opportunity to partner to both benefit the affordable housing programs but also your tenants within your supportive housing programs.

These are questions for you to think about as you're preparing to work on the inventory tool and dig into that a bit more. I'm sure there's many more questions that will then bubble up as you start working on the tool, but it's a great way to get started. With that, I am very excited to turn it over to hear a bit more from a local community that's doing incredible work, as Janis has outlined, Miami-Dade County, Florida.

[00:39:00] Victoria: Hi, thank you so much.

[00:39:01] Janis: Thank you. This is Janis. I just wanted to give a quick intro to Vicki Mallette, who is joining us from the Miami-Dade County Homeless Trust in Miami-Dade California. I've been working with Vicki since 2019 on the Moving On Initiative technical assistance through HUD, and they already had a lot of irons in the fire and things moving. Through Vicki's just tireless efforts locally, they have been able to put together a wide array of resources, and it's really coming to fruition now with their outcomes. Super excited, thanks for being here, Vicki, and please, just tell us all about what's going on locally.

[00:39:49] Victoria: Thank you so much, we couldn't have done it without you. We started our work prior to 2019, and we are the lead agency for the continuum of care. In our community, we have four public housing agencies. One is Miami-Dade Public Housing and Community Development. That is a sister agency because we are an agency and instrumentality of Miami-Dade County. We have three other housing authorities, small to medium-sized, and then we have two authorities which are pseudo-PHAs; they only have mainstream.

We partner with all of them on the Move-Up initiative. We've done a lot of partnerships with our PHAs, we've done VASH, we've done Section 8, we've done project-based vouchers, we've done the multifamily homeless preference, we've done the Family Unification Program. We're now doing the Foster Youth to Independence Program, and we've even worked with our PHA to rehab units of public housing in exchange for us funding to rehab those units.

We get the referral rights into those units. Today, I'm just going to talk about Move-Up and how that all began. One thing we can say about Miami-Dade County is that our portfolio of PSH units is pretty robust, more than 3,400 total PSH units. Our portfolio is pretty old. We've been partnered with HUD for quite some time and we have 685 scattered-site units and more than 2,700 project-based units.



Our first foray into the Moving Up program began with the Housing Authority of the City of Miami Beach, and they said, "We would like to engage in a move-up effort, and we're going to give you 10 housing choice vouchers." We created a move-up handbook, we created a move-up assessment tool in partnership with that housing authority and a number of our other partners and providers.

There was a lot of feedback and input into it. It looks largely at four areas, financial capacity, the housing history of the individual. One of the criteria for the initial assessment tool is that someone had to be in supportive housing for at least 36 months, no less. Does the individual have connection to mainstream resources? This is important to us. Are they able to find support when they need it, or are they currently plugged into the supports that help them remain stably housed?

We also require the agency and the applicant to certify that they were willing and interested in this opportunity and the agency to indicate that they supported this move-up referral. Then the providers in the continuum, without any extra funding, I might add, committed to providing clients that they were transitioning from PSH to other housing through a move-up initiative, they committed to aftercare with the client's check-ins every 30, 60, 90, and 180 days.

We then entered into a memorandum of understanding with the PHA. They amended their administrative plan and part of the criteria because they were the Housing Authority of the City of Miami Beach, that the only referrals we would make would be clients who were currently living in PSH on Miami Beach, clients who had entered PSH from the Miami Beach outreach team, and the requirement was that even if the client was in scattered-site housing on the beach, they would be required to move.

With every one of those 10, a move to a new unit was required. We made our first referral back in October of 2018. I'm happy to say that here we are quite sometime later, and all 10 of the couples remain permanently housed. The PHA that we work with was recognized by FAHRO. This is a housing and redevelopment organization. They received the 2019 Best Practice Award.

We just learned that they want to increase their Move-Up set-asides from 10 to 25, and they also applied for the recent vouchers made available for the mainstream, and they're giving us all those vouchers, not only for Move-Up but however we see fit. We're excited about that. Those two initiatives should be ready to go on April 1st. They're taking the administrative plan to their board now.

The partnership with the City of Miami Beach Housing Authority allowed us to do partnerships with other PHAs. We talked about those quasi-PHAs City of Miami and Carrfour Supportive Housing, both of whom had mainstream vouchers. We're making very robust referrals to those mainstream using Move-Up candidates, and then the other housing authorities provided a Section 8 set-aside, sometimes mainstream, and we're using that capacity to prioritize move-ups.



I should mention that all the referrals come through coordinated entry, meaning we have a housing coordinator who is employed by the CoC, and he makes all the referrals to all of our interventions across the Continuum or has a role in them. If anybody's moving into PSH or out of PSH, he's making those referrals. We also establish orders of priority for our Move-Up Program.

As you know and I'm sure all the CoC leads on this call know, we all have to go through the annual HUD process. We take a very serious look at our supportive housing portfolio if we need to reject or reallocate a project, and we have in the past, and we know that we need to find alternatives for those clients. We first consider those clients if they meet the eligibility criteria for the Move-Up Program, and if not, we laterally transfer them to supportive housing within the continuum.

Our second priority is eligible clients who have been in permanent supportive housing the longest. If we have 20 Move-Up slots, and we get 30 applications, the next person into the next available slot will be the one who meets not only eligibility criteria but has been in PSH in our continuum model. We also developed an automated assessment tool. This is all done electronically. The assessment tool is within HMIS.

The providers go into that assessment tool, answer all the questions. The eligibility form is separate, that's not signed within HMIS, that's sent separately, but it prioritizes and takes in the applications and determines eligibility. For instance, one PHA may require that only, for instance, we use clients who are on the Beach or had some contact with the Beach before referral, but others may be wide open, any client from across Miami-Dade County could be eligible, and then another community we have Homestead and Hialeah Housing Authorities who have inter-local agreements so you can live within a 10-mile radius of either of those PHAs, or you can live in the jurisdiction of the other PSH in Homestead or Hialeah. There's rules around all this that's all built into the automated assessment tool. Just recently, we were running a bit thin, and we revised our assessment tool to go down to 18 months. The threshold now for the housing stability is you only need to be stably housed, no issues, no late rent payments in PSH for 18 months or more.

We've made 400 referrals to date. Many of those are in progress right now, some of them made possible through the stimulus vouchers, but it's going really well. Some of the challenges, though, that we have had are motivating the providers and the clients. A lot of clients are really happy. We're not forcing anyone to go. We feel like they need to be educated on the benefits of Move-Up and the options of Move-Up.

One of those is they can add other members to their household if they're moving into a voucher. They can port that voucher a year after the transition, and that's something that's of interest to a lot of folks. Also, moving the PSH providers, this is more work for them. They're already working to house and keep housed disabled households that we're referring to them, and this is asking them to take people who may be stabilized and not require as much care but to get them interested in moving.



The same I could say for our housing coordinator; more referrals are required for him. He's making all the referrals out of PSH and then he's backfilling that PSH with the next most vulnerable person on our by-name or active client list using whatever criteria we've established. It's a lot of additional referrals being made. A couple of the other hurdles we've had to cross is a lot of clients need security deposits even though they can make the rent payments, and they've never been late, they don't have a lot of money saved up to make deposits on new housing.

That's the same for clients who are moving into Section 8 or mainstream, as well as clients who are moving into the ELI set-asides through the tax credit properties. You cannot use ESG because they're not homeless, they are formerly homeless, so we have partnered with two of the agencies that receive HOME dollars, HOME TBRA, and we created a letter that basically has a couple of boxes within it that says, "This client is moving

up at a PSH. Most recently, we're also moving people into ELI set-asides or from Rapid Rehousing," that's a little bit different subject. This letter basically goes on the letterhead of the agency, they plug in the name of the client that we referred. Similar to the certification on the referral, we ask both the client and the provider to certify that the information in the letter is true, and then we're getting those security deposits paid through home.

Some of the benefits and I already touched on them is, continued rental assistance and housing stability for the clients. They get increased privacy and independence, sometimes they're annoyed by intensive wraparound services, they've had them for a long time, they're ready to take the next step in their new journey, for sure, pursue new goals. Obviously, they can take the subsidy to a new city or state after one year. In some cases, they're transitioning in place. It's really just swapping out the subsidy, those are the easiest ones to do.

In other cases, they need to move and in oftentimes they want to move. Some of those initial clients on the beach were in SROs. They were ready to move to something larger, nicer, not project-based. We want to provide that support because we want to ensure a successful transition. How do you go about doing this? It's really boots on the ground for us here. We've formed good relationships with our field office directors at HUD, and they help make introductions to the PHAs if we don't know the leadership.

We try really hard to understand the portfolios of the various housing agencies and what are their needs, and what are the politics in the community so we can say all the right things. We don't wait for them to call us. We are constantly knocking on their door. Even once we get something, maybe it's 10 set-asides there's been a lot of knocking on the door of the city of Miami Beach to say, "This is looking so good. Let's take it to the next step." We partner on solicitations.

The solicitation may be something that is passed to emanate from the PHA but we say, "We're going to help you answer some of these questions, we're going to

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provide the data you need to submit this application, we're going to help you further understand how our CoC works." A lot of these agreements and solicitations require MOUs. We take the lead on helping shape those MOUs, whatever we can do to be proactive and take the burden off the PHA, and then you can write it exactly how you want it, then they can change it if they need to, but you've already outlined what would be ideal for you.

They do landlord engagement events, we have to partner on those. As I said earlier, we go back for more. What is our commitment to them? We want to ensure that we make timely referrals. They're very concerned with lease-up and they know lease-up can lead to more vouchers. We want to be very timely in making referrals. We don't want units sitting empty for any amount of time. We are working more closely with the PHA to track the client progress and really break down all of the things that happened between referral and move up, so we can see if there's a bottleneck somewhere.

Is the person missing certain documentation that the PHA requires, are we making ineligible referrals, all kinds of things. Are we losing people in housing search because they don't have enough navigation support? We want to know all the answers to those questions so we can troubleshoot. We also with all of our landlords as well as their PHAs, we reaffirm our support. The 30, 60, 90 180-day check-in, and then whenever something's not going well for a landlord or a PHA, we try to jump in immediately and see what we can do to help. Thank you so much.

[00:54:18] Janis: Thanks so much, Vicki. We'll have more time for questions and answers later. Before we get into our next piece, a couple of things coming up again and again in the chat. Everybody wants to know, is your handbook available for other folks to see?

[00:54:38] Victoria: Yes, happy to share our handbook, happy to share our assessment tool and I believe we have a YouTube video. I can send the link a bit later, and we actually show the providers how to go on to HMIF and begin to fill out the assessment.

[00:54:55] Janis: Yes, I have seen that one and it's super cool. Awesome. We'll have that information available when we get the slides and recording posted, a lot of questions about that. From my understanding, it's going to be on the registration page that you went to, to register for this through the LMS. We had a delay with getting the first session up, but that should be up this week, and this one should be up quickly as well. We'll put those follow-up materials on those registration pages. You'll just scroll down to the bottom and then the resources will be there.

Just one or two other quick questions here. How has COVID impacted landlord engagement events and other engagement too, I think would be an interesting question.



[00:55:53] Victoria: Is that for me? Things were quite slowed for quite some time. There was not only slowing in the market, because of COVID but there was slowing at the PHA level. Things weren't moving as quickly on any area. Actually, I don't know that the continuum was poised to move people too. Inspections got more tricky, initial interviews got more tricky, but things have certainly picked up now and I would say we're in overdrive. We have not exclusive to the move-on program, but we have close to 1,000 after-referrals right now to any of the interventions we have. There's a lot of referring going on all over and the PHAs are on top of it.

[00:56:39] Janis: Great. The last one before we move on was a question about what about CoC Rapid Rehousing being used as a bridge to a mainstream voucher. I know you talked about BSG to mainstream. I think it's probably that you don't have as much CoC Rapid Rehousing, but that's why you didn't talk about that, right?

[00:57:05] Victoria: We are doing a lot of Rapid Rehousing in Bridge, I didn't touch on that. We have an assessment tool for just plain old Rapid Rehousing as well. That one has a six months stable Rapid Rehousing [audio cut] six months and then referred on an ELI, or that assessment tool can be for someone who's on homeless as well. We do a lot of Rapid Rehousing at the Bridge.

[00:57:38] Janis: I think it's been great because you have those local resources, you have those great relationships that you've built with the PHAs, so you're able to have these resources for your move-out program from PSH, but also Rapid Rehousing and people experiencing homelessness. It's just wonderful to see what the community has done. Thank you so much. I'm going to turn it over now to Lindsey to just wrap up with some talk about building formalized partnerships and then we'll have more time for questions later. Keep your questions coming in the chat.

[00:58:18] Lindsey: Thanks, Janis. Can you hear me okay?

[00:58:21] Janis: Yes.

[00:58:22] Lindsey: Awesome. It's very hard to follow Vicki and all of the amazing work that you're doing during this tough role of following up from Vicki's presentation. I think a lot of what we're intending to touch on around building partnerships, Vicki's very much touched on it and it sounds like Miami Dade County is doing an amazing job in that. I want to first start out with just as a quick question for you guys, and I'm hoping you guys can enter this into the chat. I'm curious if your CoC currently has a strong partner with any of the PHAs in your area.

If not, what have been some of your common challenges in engaging them? We'll take just a second and you could just share some of the challenges that you're facing.

[pause 00:59:13]

It sounds good. It looks like several people have good and strong relationship with them. I think, Heather, your point that they all have very different policies and procedures, absolutely true. There's a struggle for self-evaluation of programming to be more low barrier and housing first. I think that alignment around best practices of being low barrier housing first, I absolutely agree. Yes, think the question Elizabeth, "We don't know what resources they always have to offer." That's a really valid question. Oh wow, I loved the CoC and PHA are co-located which really helps, I would imagine in building some of those partnerships.

Jessica, I realize a Balance of State CoC, I recognize that that is really hard because you have so many PHAs within your CoC area. That can be really hard to engage with them consistently. It sounds like you have some strong partners, and so it's sometimes targeting specific ones that may be helpful that you have relationships with. Definitely not enough vouchers. I will absolutely 100% agree with that. Thanks, guys for sharing. It can be really difficult to start conversations with the PHA when you aren't necessarily familiar with them.

You don't know what all they have to offer, and like every system, or program, or partner, they have their own language, their own acronyms, their own regulations, and their own priorities. It can be really difficult to start the conversation with them. I wanted to highlight a few pointers of ways in which you can become familiar, and to use as a way to start that engagement and relationship-building. The first is to become familiar with some of the PHA language, and there's a PHA 101 guide for CoCs that's mentioned here that's really helpful.

Then there's also another guide that HUD created strategies for CoCs to start conversations with PHAs. I think that helped, that document's super helpful in aligning where there's shared values and priorities and outcomes. I encourage you guys to check out those. Then also we've talked about this several times, the geography. For instance, in the county that I live, there are six different PHAs that serve this county. One is the statewide, and then the other are local within the county. Knowing who is covering your geographic area is really important as well, and maybe it makes more sense to partner with one over the other.

Just becoming familiar with the language and then those that serve your geographic area. I think the other one that just something to think about is that what type of Public Housing Authority are they? There are public housing authorities that are public housing only. There's those that are providing housing choice section vouchers only, and then there are those that are doing both. Understanding who's doing what within your community. Then the second is figuring out if a local PHA is Moving to Work PHA. Moving to Work is a demonstration program, and it allows for a lot of flexibility, designing, and testing innovative ideas. It allows for flexibility.

Oftentimes Moving to Work PHAs are willing to test things and create new partnerships because some of the rules and regulations are much more flexible. Knowing that gives you a bit more information about what they may be interested in. Then I think Vicki mentioned this is an important thing. As your local PHA is

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developing their annual and five-year plans and administrative plans, you can partner in providing data with them. That's one really great way to start the conversation with your PHA as they're working on these various plans that they have to do your data within the CoC can be really valuable to them as they're developing their plans.

Perhaps using that as your foot into the door. If you want to pursue a housing choice voucher of preference as we've talked about, you're going to really want to look at the administrative plan and the admissions and continued occupancy policy plan for public housing. I think the last thing and Vicki I think touched on this really, really well is thinking about what are you as a CoC asking for, what does the PHA need, and then what can you as the CoC offer as all really important things as you're thinking about how to start that conversation?

In a lot of ways Moving On initiatives align with PHA goals. PHAs are really focused on getting accurate income determination. We separate the time that it takes to lease off, and the great thing about Moving On is it can really help in advancing those goals and priorities. What we've heard from well-functioning Moving On initiatives is that a strong partnership can really refer stable participants to PHA units. That's really going to get people interested if you have tenants that have been in permanent support of housing for 36 months or three years.

In Detroit, I've seen 5-year, 10-year tenants that have been stably housed and don't need services any longer or intensive services. That's really that stability is going to be really important. Majority of those tenants are used to doing income documentation, income determination every single year, and so being able to have support completing that first application and support in getting all the documentation for income is really important. There's this opportunity with housing navigation to really reduce the time between the HCV being issued and leased up.

I think I know locally, one of the things that we've seen with Moving Up tenants-- In Detroit, it's called Moving Up. With Moving Up tenants it takes less time to lease up than regular HCV tenants. Unit inspection can be a little bit easier. The opportunity to fill public housing units more quickly especially if there's low vacancy rates or turnover, you have a tenant that is willing and interested to move on. Then just the focus on tenant stability that you're moving tenants that have been stable for a period of time and the aftercare services to continue to support that stability.

PHAs, we talked about this quite a bit, you've heard a lot about this. PHAs can create local preferences. As a CoC, you can advocate to create that preference, and I know in a lot of communities and communities that I've worked that advocacy has been really important to create that preference but then also sustain that preference over time. By creating that preference what it provides is special asset access for people who make specific criteria. Living in supportive housing for a period of time, have experienced homelessness, and it allows them to bypass that regular waiting list.



Most communities have waiting lists that are years long. This opens a door for people that meet a specific criteria to access vouchers in a new way. It requires that the PHA collaborate closely with the CoC and other stakeholders to identify who is this specific target group that we're working with. That the PHA writes or amends their plans and oftentimes and I think guys, Vicki said this, writing it for them as the CoC can be really helpful. You have the opportunity to really have that input as CoC partners and PSH partners to outline how you think it would best work rather than having the PHA necessarily write that.

Then with input from PSH providers, start to prepare that referral process. I know in future sessions there's going to be focus on the assessment and referral process as well. I really want to highlight the second main bullet on this, and I think Vicki spoke to this as well. It's really important that as you're starting these conversations and hopefully exploring what it could look like and getting something implemented, that you consider your initial capacity at the onset and be really honest and transparent about what's possible.

I think starting small with 20, or 30, or 15, or whatever that capacity limitation is for you locally it's really important, because when you're testing something new you want to be able to demonstrate to your partner, to your PHA that you can meet their expectations. That it is of benefit to them to get people into housing quickly, that there is the housing navigation support and that there are those aftercare support. Be really thoughtful around what is

what is your initial capacity and that there are pitfalls to starting big. If you start really big with 100 vouchers and you're not able to meet expectations that can have really long-term impacts on that relationship.

Then the third bullet outside of PHAs working, you can work with local low-income housing tax credit projects or other multi-family projects to create a waiting list and that would require that project to modify their tenant selection plan. In Detroit for example, we've worked with a few small tax credit projects that have rents at a very low level where we helped modify their tenant selection plan where they could take people from supportive housing and also just that are exiting homelessness in general.

One of the big takeaways is really supporting your partners whether they're PHA or other projects in writing those documents outlining processes so that's not one more thing that they then have to take on. Then like any partnership, it's super important that you develop shared agreements among all of your key partners. These agreements are super important in clarifying expectations, roles, ensuring that the initiative runs smoothly allows you to have some way of tracking accountability, and then, also we know that in our industry there's turnover.

It's a resource when there is staff or leadership turnover to point back to say this is what our shared agreement looks like. Ensuring that you're evaluating that shared agreement over a period of time I just recently was working with an agreement

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among partners and it was like six years old. Things have been going great but it may be time to reflect on that. In your shared agreement, your partners are going to vary by community. It may be your PHA, it may be another housing partner, your supportive housing providers, your CoC and there may also be another coordinating entity that may be partnering.

For in Detroit, our coordinated entry is real is a key partner in the Moving On Initiative here locally. PHS initially played an important role in kick starting this year locally. There may be a variety of other entities that you may want to include in that partnership. Within your MOU, you want to make sure that you're highlighting the roles and responsibilities. What does the referral process look like? What does the eligibility process look like? What is the role of each of the partners within those specific pieces of work?

Then around data sharing and reporting expectations, you want to be really clear, upfront what you're trying to measure collectively. Then what piece of data is each partner responsible for tracking or what pieces of data are partners responsible for tracking. Then what is the time frame in which you're looking? Are you wanting to look at the data on a quarterly basis on a monthly basis what does that look like? I think you want to be really thinking about data, you want to be in connecting to Jeremy's comments earlier around how this work can advance race equity.

I strongly recommend that as you're looking at all of your data elements that you're breaking that out by race to identify are you seeing differences among race whether it be from voucher issuance to move into-- maybe it is taking BIPOC individuals or households a little bit longer. Really breaking that data out to understand where there's bottlenecks as Vicki said but then also are BIPOC households having different experiences and why. You may also want to add a confidentiality clause.

I know in our Detroit Moving Up Initiative we added a confidentiality clause because we knew that we were going to be looking and seeing sensitive information and so that was another important piece. Another key partner that's not listed that you may want to think about is, is there a role in a possible partnership with people with lived expertise that have moved on perhaps they can also be a key partner and in the various parts of the project and providing that feedback.

When we think about what the roles that each of those partners are a little bit more, you can see on here that there's some coordinating entity maybe that's the CoC maybe that's someone else that is really bringing all of the partners together that's providing training to supportive housing providers or others that's certifying tenant eligibility according to local criteria and that is ultimately looking at all of the outcomes and reporting. If you see it across all partners PSH and the PHA partner, data tracking is a part of each of those but under the CoC or other coordinating entity.

They're taking all of that data and compiling it in identifying tenants are we meeting the outcomes that we had expected. With your PSH provider, it's really supporting

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existing tenants with their documentation and housing applications. Getting them prepared and ready to move on. It may be housing search support or landlord engagement if you're transitioning in place working with the landlord to navigate what the voucher change process could look like. Then those transition supports to promote housing stability and voucher retention.

I think those transition supports can look differently in each community. In Detroit, it's six-month transition support and so really talking about what does that look like for your community. Just a quick example I've mentioned Detroit a couple of times and the Detroit Moving Up Project started in 2014 and so it's been around for many years now. I think it's created some really strong partnerships between the local continuum of care and the state public housing authority and each year additional vouchers have been committed.

The ultimate goal has been to move families and households living in permanent supportive housing via CoC programs. We're looking at expanding that to see what that would look like to transition to the Housing Choice Voucher. The first step has been really with the support of housing providers to assess client readiness based on a standard assessment and then complete application and an ROI and a number of other key documents. Based on that assessment, it's been referred to CoC who receives and pre-screens that.

Then ensuring that that supportive housing provider has an MOU to be a part of the project and then the continuum of care coordinated entry partners send those referrals to the public housing authority who then will issue the voucher. Then the case manager supports that tenant during the intake and housing search process and completing all of the materials that are necessary. The PHA really oversees the Housing Choice Voucher, the service provider the supportive services, and then the continuum of care the coordination and monitoring.

I know that was a lot in a short period of time and excited to turn it back to Janis and see what some of your questions are.

[01:18:36] Janis: Yes, thanks so much so we've answered a lot of different questions as we've gone along in the chat but just in case not everyone's following this chat, just want to share a couple of things that have come up especially notes that I just wanted to highlight for the group. One piece that came up was around how PHAs don't typically have the funding to help Moving On clients with their tenant-based housing search. CoC have to be that bridge in helping their clients in that unit search and have contracting paperwork.

I think you heard this in the presentation today and we'll also be talking through this more in our session around Moving On services which will happen in a couple of weeks. This is absolutely an important point that just Moving On programs in general need to build in that time and that funding to make sure that you know case managers who already have a lot of their plates with doing regular support housing work can do this housing navigation and the search. It's just really critical.

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Just also wanted to highlight someone shared that they are testing a process with one of their PHAs around cross-referencing their binding list and the PHAs' waitlist to determine who can get access to mainstream vouchers. That PHA is a part of a data-sharing agreement and coordinated entry consent that lets them share info. They are reviewing their list, and then they will reach out to the agency providers to get the process started for eligible tenants, so that's exciting.

They are in the middle of their first go with this new process, so there's been some challenges, but starting to see great movement. That's definitely something to potentially talk to your local PHAs around. That is a way that you can help them identify who's on their waitlist that's eligible for one of these preferences, and a great way to start working together and get access to resources for some of your clients. Any other questions for any of the presenters today, other questions for Miami, or anything else that folks want to highlight. You have a couple of minutes left.

[silence]

One question that came in, if you can use supportive services for housing search? Case managers can turn their case management to being transition-focused, and to doing that housing search work. Although a lot of times, case managers don't necessarily have all the connections in the community with landlords and the ability to do this as well as say somebody who's focused on housing navigation, especially, site-based PSH case managers that don't do housing searchers for people on the front end, this might not be in their wheelhouse of things that they do.

Although you can use the supportive services, you may want to think about other resources that can be used to find specific housing navigators or brokers in the community or others there. Another question about Moving On programs and transferring back to PSH if needed. This is a challenge. For the most part, there are a lot of different ways that PSH is funded. Typically, it's really important to go through this process of assessment, which we're going to talk about in the next session in two weeks to make sure that the person who's moving on is really stable.

That they're set up for long-term stability because typically, you are not able to return to PSH once you move on if there's trouble. Part of Moving On is making sure that you're doing those transition services so that a household is setup for stability, and that they know who they can go to in the community if they start having any challenges. They're connected to those mainstream community-based supports to help them if they start to struggle. Typically, it's not a possibility for folks to move back into PSH just because that's the way that coordinated entry works.

Another question about transitioning in place. This is something PSH programs, NHTD both do require reasonableness and HQS. Typically, it's similar and that they are not challenges but we have heard in some cases depending on the city that a PSH provider does an HQS inspection, and the PSH does an HQS inspection. One may be a little more strict than the other, or might find different things. It's important to just keep an eye out for that to really carefully go through those HQS inspection

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standards. When someone is transitioning in place, to also look at, is the payment standard any different?

Is the allowance for the number of bedrooms for the household any different? Because that can be a bit of an issue.

[pause 01:24:53]

The PowerPoint for the first webinar will be up at some point hopefully, this week on the registration page for that webinar.

[pause 01:25:24]

A question about youth experiencing homelessness who need help in their housing, but are more self-sufficient. The question is, do PHS look at youth in an equitable way to assist younger folks whose disability is sufficient for CoC assistance? I'm going to guess maybe that should be insufficient. Maybe they don't have CoC assistance, but they also don't fit into the tighter parameters of PHAs? I think for populations like that where you're seeing a gap and a struggle, this is a great place to be partnering with PHAs, for the CoC to help the PHAs understand their population, to understand what they can do to make it easier for people to access resources.

There a lot of PHAs who maybe do training for their intake staff on working with people who have experienced homelessness, trauma-informed care while you're trying to really look at how does the client who's experiencing homelessness, including possibly a young adult look different from another client that's coming in. How do we need to maybe adjust our processes to be more acceptable? It's not the case that every PHA does that, but that's something that the CoC can work with them on. I think that we're just around time, so thanks so much to all of the different presenters today.

As I have mentioned, we'll have a training for PHAs tomorrow. That's for PHAs multifamily and other housing operators. If you're a CoC or PSH provider, you don't need to come to that. Unless you're interested, you're welcome. In two weeks, we're going to have our next session on the Moving On assessment screening and referral processes, so we'll dig in there. Then the week after, we will talk about creating a culture supportive of Moving On in PSH. Thank you so much, everyone for your time today.

[01:28:26] [END OF AUDIO]