



FSS Resource Library



U.S. Department of Housing and Urban Development
Office of Public and Indian Housing

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FSS Resource Library

The purpose of this Resource Library is to make resources related to HUD's Family Self-Sufficiency (FSS) program available to FSS coordinators and others with an interest in the program. Many of the resources included here are referenced in the [FSS Program Online Training](#) and the companion guidebook, [Administering an Effective FSS Program: A Guidebook Based on Evidence and Promising Practices](#).

Disclaimer: While every effort has been made to ensure that the resources included here are useful to FSS coordinators, the inclusion of any particular sample document or the link to any particular external resource does not represent an endorsement by HUD or its contractors of the content of the document or resource. Additionally, some resources may require specialized or technical expertise to adapt and use for an FSS program. Coordinators should exercise judgment in determining how to use or adapt these materials in connection with their programs.

1

Introduction



1. Introduction

FSS Program Information

[25 Years of the Family Self-Sufficiency Program: Families Working, Families Prospering](#)

This resource highlights the accomplishments of HUD's Family Self-Sufficiency (FSS) program in helping subsidized housing residents increase their earnings and build assets and financial capability. Based on 25 years of experience with FSS, this e-book recognizes the important contributions of local FSS programs and service partners in helping hard-working families make progress toward economic security, and features several remarkable success stories of recent program graduates and a summary of key outcomes. This snapshot of the FSS program at its 25-year mark underscores the promise of FSS and the beneficial impacts of increasing participation in FSS and continuing to strengthen the quality of local FSS programs.

[View Flipbook](#) | [View PDF](#)

[HUD Family Self-Sufficiency \(FSS\) Program Website](#)

FSS Program Coordinators serving public housing residents and/or Housing Choice Voucher (HCV) holders should thoroughly review all information on the FSS website maintained by the Office of Public and Indian Housing, which provides current information on grant opportunities and any updates to policies and procedures. FSS Program Coordinators serving HUD-assisted multifamily housing residents should visit the FSS webpage maintained by the Office of Housing.

[Family Self-Sufficiency Program Training](#)

This self-directed training provides a comprehensive overview of how to administer an effective FSS program. The training covers all aspects of the FSS program, from helping participants set goals and develop Individual Training and Services Plans to helping participants increase their earnings and build assets and financial capability. Video clips featuring FSS practitioners and HUD staff provide real-world context and examples of the guidelines and promising practices described in the training. Viewers can test their knowledge at the end of each module by taking short quizzes on what they have learned. The training takes approximately 8 to 10 hours to complete.

[Administering an Effective Family Self-Sufficiency Program: A Guidebook Based on Evidence and Promising Practices](#)

This guidebook complements the online training by providing in-depth information about all aspects of the FSS program. Drawing on evidence about "what works" and the experience of FSS practitioners, the guidebook provides more detail on the topics covered by the online training as well as other tools and resources to help readers develop and administer a successful FSS program.

[FSS Chapter of HUD's Housing Choice Voucher Guidebook](#)

For a basic overview of the FSS program regulations, see Chapter 23 of HUD's Housing Choice Voucher (HCV) Guidebook which describes the rules applicable to the HCV FSS program as of 2001 in a 'plain language.'

[The FSS Program Regulations \(24 CFR §984\)](#)

The FSS regulations specify the basic rules applicable to FSS programs administered by public housing agencies for the benefit of HCV holders and/or public housing residents.

[Waivers and Alternative Requirements for the FSS Program \(79 FR 78100\)](#)

Upon the consolidation of the public housing and HCV FSS programs in 2014, HUD issued this brief notice that includes a number of provisions designed to reconcile rules that had previously applied differently to FSS participants in the HCV and public housing programs.

[The Inventory Management System/PIH Information Center \(IMS/PIC\) Family Self-Sufficiency \(FSS\) Reporting and FSS Program Portability Provisions \(PIH Notice 2016-08\)](#)

This Notice provides information on FSS reporting and portability including the circumstances under which PHAs must submit FSS Addendum reports to HUD, guidance and best practices on how to ensure accurate reporting to HUD about FSS, and requirements for handling families on FSS who exercise portability or move from one PHA program to another.

[FSS Addendum and Instructions](#)

PHAs are required to complete the FSS Addendum – Section 17 of HUD Form 50058 – for all FSS participants. Note that some of the instructions for completing this form have been superseded by PIH Notice 2016-08.

[Family Self-Sufficiency Program in Multifamily \(HUD Notice H-2016-08\)](#)

This Notice implements the policies and procedures applicable to FSS programs administered in privately-owned HUD-assisted multifamily housing properties.

[FSS Notices of Funding Availability \(NOFAs\)](#)

PHAs that receive FSS program coordinator grants from HUD must adhere to the requirements specified in the FSS NOFA announcing that funding. FSS NOFAs are published on HUD's website and www.grants.gov when they are announced. Sign up for notifications of NOFA publication on Grants.gov.

[Promoting Partnerships to Utilize Housing as a Platform for Improving Quality of Life \(PIH Notice 2011-51\)](#)

This notice outlines suggested ways to forge partnerships with public and private agencies at the federal, state, and local levels to promote resident connections to health care, education, employment, and other social services in an effort to improve quality of life and provide a foundation for successful housing outcomes.

[PIH's Financial Reporting for the Family Self-Sufficiency \(FSS\) Program Accounting Brief #23](#)

This brief provides information on how to report both public housing and HCV FSS program accounting transactions in the PHA's annual FASS-PH submission. Specifically, it addresses reporting for FSS coordinator grants, reporting for FSS program expenses, reporting for FSS escrow activities, and FSS requirements associated with the Rental Assistance Demonstration program.

[HUD Privacy Protection Guidance for Third Parties \(PIH Notice 2015-06\)](#)

This notice informs all public housing agencies (PHAs) about their responsibilities for safeguarding personally identifiable information (PII) required by HUD and preventing potential breaches of this sensitive data.

Basic FSS Documents

[FSS Action Plan \(24 CFR §984.201\)](#)

Every PHA or owner that wishes to operate an FSS program must submit an FSS Action Plan to HUD for approval. The FSS Action Plan describes the size of the FSS program, the services that it will offer, and how the program will be administered. The FSS Action Plan must also describe all FSS policies over which the PHA has discretion. The requirements and components of the Action Plan are detailed in 24 CFR §984.201 and HUD Office of Housing Notice H-2016-08.

[FSS Grant Agreements](#)

PHAs that receive FSS coordinator funding sign a grant agreement with HUD upon receipt of the funding. The grant agreement describes obligations the PHA must meet as a condition of receiving the grant.

[Contract of Participation \(HUD Form-52650\)](#)

HUD has developed a form for the FSS Contract of Participation, including the Individual Training and Services Plan, that specifies responsibilities of the PHA as well as the FSS participant.

[Individual Training and Service Plan \(ITSP\)](#)

The ITSP is part of the Contract of Participation and is where the goals identified by the participant are recorded. The ITSP includes services provided to the participant, activities and the steps that he or she will take, and estimated, agreed-upon completion dates for services and activities. Each participating adult family member should complete his or her own ITSP.

[Escrow Account Credit Worksheet](#)

FSS program coordinators may benefit from consulting this optional form developed by HUD that can be used to calculate the escrow credit earned by FSS participants. After enrollment in FSS, escrow credit must be determined at each reexamination and interim determination. The worksheet provides a step by step roadmap for completing the escrow calculation. PHAs may also develop their own version of the worksheet.

Sample Documents

[Sample FSS Action Plan from Nan McKay and Associates](#)

This sample document is excerpted from Chapter 4 of a Model FSS Action Plan developed by Nan McKay & Associates.

[Sample FSS Action Plan for the City of Sioux City](#)

Family Self-Sufficiency Action Plan for the Housing Authority of the City of Sioux City. Approved on May 2, 2002 and last amended on August 11, 2015.

[Sample FSS Action Plan from J. D'Amelia & Associates](#)

Family Self-Sufficiency Program Action Plan for the State of Connecticut Department of Housing developed by J. D'Amelia & Associates. Last updated January 2017.

2

Outreach and Goal-Setting



2. Outreach and Goal-Setting

The Program Coordinator Position

Role of the FSS Coordinator

[2016 Family Self-Sufficiency Program Notice of Funding Availability \(NOFA\)](#)

Describes the funding awarded for Program Coordinator positions and the responsibilities of FSS Program Coordinators in Section I.A.1.b. (pp. 2-3).

Training in the Basic Requirements of FSS

[The National Association of Housing and Redevelopment Officials \(NAHRO\) Professional Development System: FSS Training](#)

NAHRO offers a two-day training course for members and non-members, including a proficiency test and potential to earn NAHRO Continuing Education units.

[Nan McKay and Associates: Family Self-Sufficiency \(FSS\) Training](#)

This three-day training course for Housing Choice Voucher and public housing staff covers all details of the FSS program, including HUD regulations, the coordinating committee, intake and family selection, contracts, calculating escrow accounts, portability, marketing, and finding private sector resources. Participants may take a certification exam and obtain Continuing Professional Education (CPE) and Continuing Education Units (CEU) credits.

[NMA Family Self-Sufficiency \(FSS\) Master Book](#)

This guidebook prepared by the private trainer Nan McKay & Associates provides an overview of FSS program regulations and policies, including ideas on how to market your FSS program in the community, and how to collaborate with the private sector to expand resources available to families.

[PIC Consulting: FSS Academy](#)

This FSS Coordinator Professional Certification Program is approved by the National Association of Social Workers and focuses on the day-to-day decisions made by FSS coordinators.

[Quadel Consulting: FSS Program Training](#)

This course is designed to give staff that may have different roles and responsibilities related to the FSS program, a detailed understanding of FSS requirements and their implications on program management. Offerings include scheduled trainings on all aspects of the FSS program, as well as tailored trainings at clients' request.

Training in Advanced Case Management and Coaching Techniques

Motivational Interviewing

[Motivational Interviewing Network of Trainers \(MINT\)](#)

MINT is a professional non-profit organization of independent Motivational Interviewing trainers. MINT maintains a list of trainers, training events, and other resources.

[Spotlight on PATH Practices and Programs: Motivational Interviewing](#)

This SAMHSA report on Motivational Interviewing within the context of homelessness is a technical assistance document of the Projects for Assistance in Transition from Homelessness (PATH) Technical Assistance Center. Spotlight on PATH Practices and Programs: Motivational Interviewing (2010). Rockville, MD: Center for Mental Health Services, Substance Abuse and Mental Health Services Administration.

[Center for Evidence-Based Practices at Case Western Reserve University: Motivational Interviewing](#)

The Center for Evidence-Based Practices offers information and resources, including training information, on Motivational Interviewing.

Trauma-informed Care

[National Center on Family Homelessness: Trauma-Informed Care](#)

The National Center develops and disseminates tools and resources for adopting trauma-informed care across service systems and provides training and technical assistance to support implementation.

[National Center for Trauma-Informed Care \(NCTIC\)](#)

NCTIC at the Substance Abuse and Mental Health Service Administration (SAMHSA) provides technical assistance, training, and consultation to support systems and programs that are committed to implementing trauma-informed approaches to service delivery.

[The Trauma Informed Care Project](#)

This website aims to educate service systems about trauma and how it may impact the system and/or affect the family, and includes a calendar of trainings and events, resources listings, and a form to request training.

Coaching

[The Co-Active Coaching Model](#)

The Coaches Training Institute offers trainings as well as a free webinar on the Co-Active Coach Training program. This coaching model outlined by The Coaches Training Institute is client driven, graduated into small steps, and supportive.

Outreach and Enrollment

As part of the FSS program coordinator's role in conducting outreach for the program, coordinators must market the program to potential participants. Examples of FSS promotional materials can be found below, under the Sample Documents section.

Contract of Participation and Individual Training and Services Plan (ITSP)

These resources are referenced in the Guidebook and/or Online Training as part of the discussion of preparing and updating Contracts of Participation and Individual Training and Services Plans:

[Contract of Participation \(HUD Form-52650\)](#)

HUD has developed a form for the FSS Contract of Participation, including the Individual Training and Services Plan, that specifies responsibilities of the PHA as well as the FSS participant.

[Individual Training and Service Plan \(ITSP\)](#)

The ITSP is part of the Contract of Participation and is where the goals identified by the participant are recorded. The ITSP includes services provided to the participant, activities and the steps that he or she will take, and estimated, agreed-upon completion dates for services and activities. Each participating adult family member should complete his or her own ITSP.

[HUD Privacy Protection Guidance for Third Parties \(PIH Notice 2015-06\)](#)

The Contract of Participation, and other documentation families provide to the FSS program, contain information that is considered sensitive and is protected by [The Privacy Act of 1974](#). This notice informs all public housing agencies (PHAs) about their responsibilities for safeguarding personally identifiable information (PII) required by HUD and preventing potential breaches of this sensitive data.

[Waivers and Alternative Requirements for the FSS Program \(79 FR 78100\)](#)

Upon the consolidation of the public housing and HCV FSS programs in 2014, HUD issued this brief Notice that includes a number of provisions designed to reconcile rules that had previously applied differently to FSS participants in the HCV and public housing programs. As specified in this Notice, HUD no longer permits housing assistance to be terminated or withheld as a consequence of failing to complete the Contract of Participation. The current form for the Contract of Participation (HUD-52650) has not yet been updated to reflect this change, and provision (3) under the heading “Corrective Actions for Failure to meet Family Responsibilities” on this form, stating that assistance can be terminated for families participating in the Housing Choice Voucher program, is no longer valid. Program coordinators should disregard or strike this line in the form.

[Living Wage Calculator](#)

MIT’S Living Wage Calculator, first created in 2004 by Dr. Amy K. Glasmeier at MIT, provides a measure of basic needs that can help inform discussions with FSS participants about goal setting and whether participants who have completed their initial goals should amend their ITSPs to add additional goals in order to make further progress toward economic security before graduating. It is a market-based approach that draws upon geographically specific expenditure data related to a family’s likely minimum food, child care, health insurance, housing, transportation, and other basic necessities (e.g. clothing, personal care items, etc.) costs.

Participant Assessments

Informal Assessment Tools

Matrix Outcomes Model: Family Development Matrix

A guide for talking through a variety of categories and indicators of family outcomes when assessing FSS participants, with multiple customized versions.

[Matrix](#)

[Example Indicators](#)

Vocational Assessment Tools

These assessments may require specialized or technical expertise to adapt and administer in an FSS program. Coordinators should exercise judgment in determining how to use these resources and refer to expert service providers when the coordinator does not possess the requisite expertise.

[U.S. Department of Labor: O*Net Ability Profiler](#)

A vocational assessment tool that assesses strengths in 9 job-relevant abilities.

[U.S. Department of Labor: O*Net Interest Profiler](#)

A vocational assessment tool that assesses interest in 6 types of occupations.

[SkillScan Assessments](#)

Career assessments for counselors that identify transferable skills

[ACT: WorkKeys](#)

Assessments to measure essential workplace skills, including measures of both “hard” and “soft” job skills, and help people build career pathways.

[Campbell Interest and Skill Survey](#). Vocational interest and skills inventory with career planner for college-bound or college-educated individuals.

Goal Setting

[Individual Training and Service Plan \(ITSP\)](#)

The ITSP is part of the Contract of Participation and is where the goals identified by the participant are recorded. The ITSP includes services provided to the participant, activities and the steps that he or she will take, and estimated, agreed-upon completion dates for services and activities. Each participating adult family member should complete his or her own ITSP.

[A Focus on Executive Skills and Goal Achievement: An Emerging Framework for Employment and Related Human Service Programs](#)

This presentation by LaDonna Pavetti with the Center on Budget and Policy Priorities describes the research on self-regulation and executive function to make the case for using a goal achievement approach for employment and related human service programs. Pavetti, LaDonna. (2015). *A Focus on Executive Skills and Goal Achievement: An Emerging Framework for Employment and Related Human Service Programs*. Center on Budget and Policy Priorities.

[Your Money, Your Goals](#)

A toolkit provided by the Consumer Financial Protection Bureau (CFPB) to assist social service organization staff in discussing financial health and practices with participants, providing financial coaching or education, and credit support activities. The toolkit is modular (i.e., service coordinators can incorporate any or all topics from the toolkit) and aims to help coordinators increase client financial empowerment.

[Virtual Goal Coach](#)

An online tool containing links to resources that can help families achieve their employment, financial, education and homeownership goals.

[TuaPath](#)

A career counseling and resources software program, TuaPath is developing a web-based tool to assist TANF participants with goal setting and attainment. The tool does not replace case management, but rather creates an opportunity to individualize case planning and automate frequent conversations like finding a child care provider.

Sample Documents

Role of the FSS Coordinator

[Sample FSS Coordinator Job Description – Nan McKay and Associates](#)

Nan McKay and Associates developed this sample job description when hiring new FSS coordinators for “Any Town Housing Authority.”

Sample Contract of Participation and ITSP

[Individual Training and Services Plan \(ITSP\)](#)

This is a blank version of the Individual Training and Service Plan from form HUD-52650.

[Sample ITSP – Required Goals – City and County of Honolulu](#)

This is a sample Individual Training and Service Plan with the two required HUD goals from the City and County of Honolulu.

[Sample ITSP – Education and Homeownership – Lincoln Housing Authority](#)

This is a sample FSS Individual Training and Service Plan with education and homeownership interim goals from the Lincoln Housing Authority.

[Sample ITSP – Child Care – Nan McKay and Associates](#)

This sample Individual Training and Service Plan from Nan McKay and Associates shows how a participant plans to achieve an interim goal pertaining to child care.

[Sample ITSP – Prepare for Homeownership – Sioux City Housing Authority](#)

This sample Individual Training and Service Plan from the Sioux City Housing Authority shows how a participant plans to achieve an interim goal of preparing for homeownership.

[Sample ITSP – Complete GED – Sioux City Housing Authority](#)

This sample Individual Training and Service Plan from the Sioux City Housing Authority shows how a participant plans to achieve an interim goal of completing their GED.

[Sample ITSP – Increase Self-Employment Income – Sioux City Housing Authority](#)

This sample Individual Training and Service Plan from the Sioux City Housing Authority shows how a participant plans to achieve an interim goal of increasing self-employment income.

[Sample FSS Participant Handbook – Sioux City Housing Authority](#)

This is a handbook that the Sioux City Housing Authority provides to its FSS participants. It includes an overview of the program requirements, essential documents, relevant policies, and other resources available to participants.

Sample Assessments

[Arizona Self-Sufficiency Matrix](#)

An informal assessment tool for evaluating participants on 5-point scale across 18 self-sufficiency domains. The scores achieved are used to measure client progress on goals after they were enrolled in a program and to identify additional programs that could help clients achieve the best outcomes. When total scores on a self-sufficiency matrix are used for the purpose of making eligibility determinations, each domain and the criteria used to score each domain has an effect on a family's score. This matrix has been used or adapted by other programs by adding more domains or assessment areas, modifying the criteria associated with scores within some domains, or selecting a smaller number of domains to include in assessments.

[Self-Sufficiency Matrix](#)

Created by the Snohomish County, WA, Self-Sufficiency Taskforce, this self-sufficiency assessment and measurement tool evaluates participants on a 10-point scale across 25 outcome scales. It is recommended that each program selects 3-5 scales based on the program's core purpose, philosophy, and strategies.

[Home Forward \(Housing Authority of Portland, OR\): Goals and Initial Assessment](#)

A 100-question initial assessment tool designed to help coordinators learn about FSS participants' goals and develop their Individual Training and Services Plan (ITSP).

[Sample Work Readiness Assessment – Brazos Valley Council of Governments](#)

This sample Work Readiness Assessment Matrix is used by the Brazos Valley Council of Governments to track and assess participants' employment preparedness. The scoring system is cumulative; each "X" earns one "point," and with each additional point a participant is considered more ready for employment. All participants must start with a GED or high school diploma before moving on to higher-level categories. After that, each point is a step toward employment, but participants do not need to fulfill steps in any order and may work to fulfill more than one category at once. Once all steps are completed, the priority is to search for employment, but there may be times when participants need to revisit a category, such as higher education, to improve their employability.

[Sample Initial Assessment – Brazos Valley Council of Governments](#)

The FSS program operated by Brazos Valley Council of Governments uses this initial assessment form to conduct a baseline assessment and to learn more about FSS participants' employment and education experiences and goals as well as barriers to inform development of their ITSPs upon program entry.

[Sample Initial Assessment – Nan McKay and Associates](#)

This interview matrix developed and used by Nan McKay and Associates assesses a broad array of potential issue areas that FSS participant families may be facing at program entry. It includes questions pertaining to several topic areas: the family's shelter, access to food, income/employment, health/safety and legal/immigration status. For each topic, there is a series of "indicators" that the interviewer should be able to circle based on the participants' answers. There are also interventions (i.e., service needs) listed in conjunction with each indicator. To assess the family's wellbeing in each topic area, there are primary questions to start with, followed by secondary questions listed on the next page to assist in follow-up after the family has answered the primary questions.

[Sample Pre-ITSP Assessment & Planning Tool – Nan McKay and Associates](#)

The Any Town Housing Authority's FSS Family Assessment Matrix Plan is a measurement tool designed to identify FSS participants' goals, strengths, service needs, and supports, as well as their eligibility and suitability for various services. This assessment tool measures an individual's or family's progress over time in 16 domains: Shelter & Housing, Income & Employment, Food & Nutrition, Health, Safety & Care, Childcare & Transportation, Education & Relationships, as well as veteran, immigration and legal status. It includes a 5-point scale ranging from "in crisis" to "thriving" for each domain, as well as a space for noting participants' "scores" quarterly. It includes boxes to check to categorize a participant's status within each domain, spaces for notes, and specific referrals.

[Sample Family Development Rubric with Benchmark Indicators – Nan McKay and Associates](#)

The Strong Beginnings Program uses this assessment matrix to identify participants' needs in a wide array of domains.

[Sample Monthly Education Assessment – Brazos Valley Council of Governments](#)

Brazos Valley Council of Governments uses this form to reassess FSS participants' progress in education at monthly meetings.

[Sample Monthly Employment Assessment – Brazos Valley Council of Governments](#)

Brazos Valley Council of Governments uses this form to reassess FSS participants' progress in employment at monthly meetings.

Examples of FSS Promotional Materials

[Program Brochure – Kentucky Housing Corporation](#)

Sample brochure for the Kentucky Housing Corporation's Tenant-Based-Rental-Assistance program.

[Family Self-Sufficiency Program Brochure – Maine State Housing Authority](#)

Sample brochure for the Maine State Housing Authority's Family Self-Sufficiency program.

[Family Self-Sufficiency Program Brochure – Fairfax County Department of Housing and Community Development](#)

Sample brochure for the Fairfax County Department of Housing and Community Development's Family Self-Sufficiency program.

[Family Self-Sufficiency Program Brochure – Nebraska Lincoln Housing Authority](#)

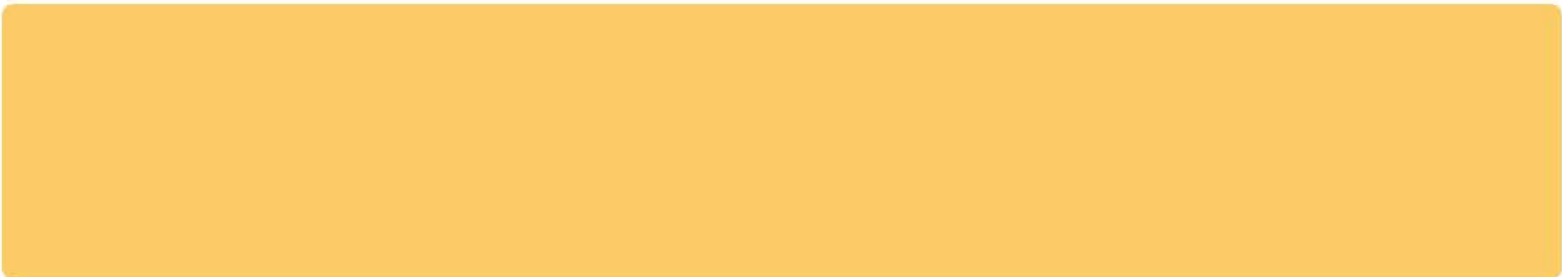
Sample brochure for the Nebraska Lincoln Housing Authority's Family Self-Sufficiency program

[POAH Communities Poster – Compass Working Capital](#)

This poster, created by Compass Working Capital for POAH Communities, is used to promote the Compass FSS Program.

3

Case Management/Coaching



3. Case Management/Coaching

Client-Centered Approach

[Encouraging Motivation to Change: Am I Doing This Right?](#)

This is a checklist by the Center for Evidence-Based Practices at Case Western Reserve University provides 11 questions to ask oneself about the way one engages with clients to ensure a client-centered approach

[The Co-Active Coaching Model](#)

The Coaches Training Institute offers trainings as well as a free webinar on the Co-Active Coach Training program. This coaching model outlined by The Coaches Training Institute is client driven, graduated into small steps, and supportive.

Building a Trusting Relationship with Participants

See Training in Advanced Case Management and Coaching Techniques under Chapter 2: Outreach and Goal-Setting of this Resource Library.

Participant Meetings and Communications

[Effective Case Management: Key Elements and Practices from the Field](#)

This is an issue brief with examples of key elements and practices for effective case management in the workforce system. It provides examples of state and local tools, processes, and policies designed to create or improve case management, and includes an annotated list of additional resources. Laird, Elizabeth; Holcomb, Pamela. (2011). Effective Case Management: Key Elements and Practices from the Field. Washington, DC: Mathematica Policy Research.

Referrals to Service Providers

[Promoting Partnerships to Utilize Housing as a Platform for Improving Quality of Life \(PIH Notice 2011-51\)](#)

This notice outlines suggested ways to forge partnerships with public and private agencies at the federal, state, and local levels to promote resident connections to health care, education, employment, and other social services in an effort to improve quality of life and provide a foundation for successful housing outcomes.

[Resources for Community and Supportive Services](#)

Developed by the Community and Supportive Services (CSS) division of the HUD HOPE VI program, this web page links to news, research, services, partnerships, and other resources on a variety of topics including financial literacy and asset building, housing and community building, resident services and service coordination, and job training and job readiness.

[Workforce Development Boards](#)

Workforce Development Boards that operate state and local workforce development and training programs can provide FSS participants with access to specific work-promoting services. They also oversee the American Job Centers, where job seekers can get employment information, find out about career development training opportunities and connect to various programs in their area.

[American Job Centers \(formerly One-Stop Career Shops\)](#)

The nearly 3,000 American Job Centers nationwide provide employment search and training assistance.

[HUD Approved Housing Counseling Agencies](#)

HUD sponsors housing counseling agencies throughout the country that can provide advice on buying a home, renting, defaults, foreclosures, and credit issues.

[Community Action Agencies](#)

Community Action Agencies (CAAs) are locally governed, nonprofit private and public organizations that serve low-income people to help themselves in achieving self-sufficiency. CAAs cover 96 percent of the nation's counties, and each provides a different mix of programs and services. The agencies are connected by a national network that includes the Community Action Partnership national association, regional associations, state associations, a national lobbying organization, and a national association of Community Service Block Grant administrators.

Building Executive Skills

[Strengthening Economic Self-Sufficiency Programs: How Housing Authorities Can Use Behavioral and Cognitive Science to Improve Program](#)

This paper draws from behavioral and cognitive science research on the effects of persistent poverty on decision-making and other mental processes and offers guidance that PHAs can use to design self-sufficiency programs that fit the needs of chronically low-income households and provide a stronger platform for success. Brennan, Maya. (2014). Strengthening Economic Self-Sufficiency Programs: How Housing Authorities Can Use Behavioral and Cognitive Science to Improve Program. Center for Housing Policy.

[Executive Skills Definitions](#)

This executive skills list from Building Better Programs, a project of the Center on Budget and Policy Priorities, groups skills into three categories: planning and organizing, reacting to events, and getting things done.

[Adult Executive Skills Profile](#)

This is an adapted version of the Executive Skills questionnaire developed by Peg Dawson and Richard Guare and instructions for use. This tool is intended to be used to help individuals get a better understanding of their skill strengths and skill weaknesses.

[A Focus on Executive Skills and Goal Achievement: An Emerging Framework for Employment and Related Human Service Programs](#)

This presentation by LaDonna Pavetti with the Center on Budget and Policy Priorities describes the research on self-regulation and executive function to make the case for using a goal achievement approach for employment and related human service programs. Pavetti, LaDonna. (2015). *A Focus on Executive Skills and Goal Achievement: An Emerging Framework for Employment and Related Human Service Programs*. Center on Budget and Policy Priorities.

Sample Documents

[Sample Case Review and Triage Form – Brazos Valley Council of Governments](#)

This Case Review Form is used by the Brazos Valley Council of Governments for quarterly meetings with their Workforce Solutions office to 'triage' hard-to-serve families.

[Sample FSS Referral Form – Brazos Valley Council of Governments](#)

This sample referral form is used by the Brazos Valley Council of Governments to refer FSS participants to service providers in the community and for tracking effectiveness of referrals.

[Sample Checklist for FSS Interviews with Referral Letter Notes – Brazos Valley Council of Governments](#)

This sample checklist is used by the Brazos Valley Council of Governments to take notes during participant meetings to include in a referral letter for FSS participants to receive services that can support them in achieving the goals in their Individual Training and Services Plan.

[Sample FSS Coordinator Training – Brazos Valley Council of Governments](#)

The Brazos Valley Council of Governments uses this presentation slide deck to train its FSS coordinators.

[Sample Participant Appointment Schedule – Brazos Valley Council of Governments](#)

Brazos Valley Council of Governments uses this spreadsheet to track monthly in-person appointments with non-working FSS families and participants and follow-up with working FSS families and participants.

4

Helping FSS Participants Increase Their Earnings



4. Helping FSS Participants Increase Their Earnings

Overall Approach to Promoting and Supporting Employment

[How to Build Bridge Programs that Fit into a Career Pathway: A Step-by-Step Guide Based on the Carreras en Salud Program in Chicago](#)

The purpose of this manual is to provide the tools and information needed to develop successful bridge programs, drawing on the specifics of the development and implementation of *Carreras en Salud*. Estrada, R. & DuBois, T. (2010). *How to Build Bridge Programs that Fit into a Career Pathway: A Step-by-Step Guide Based on the Carreras en Salud Program in Chicago*. Chicago, IL: Instituto del Progreso Latino.

Access to Basic and Adult Education

[Making Skills Everyone's Business: A Call to Transform Adult Learning in the United States](#)

This report presents a national action plan on adult skills research and practice synthesis for making adult skill development—upskilling—more prevalent, efficient, effective, and convenient. *Making Skills Everyone's Business: A Call to Transform Adult Learning in the United States*. (2015). Washington, DC: U.S. Department of Education, Office of Career, Technical, and Adult Education.

Finding and Retaining Employment

[Career Pathways Toolkit: A Guide for System Development](#)

This toolkit made available by the U.S. Department of Labor's Employment and Training Administration provides the workforce system with a framework, resources, and tools for states and local partners to develop, implement, and sustain career pathways systems and programs.

[Job-Driven Employment and Training Checklist](#)

This checklist is derived from the evidence-based practices summarized in the 2014 job-driven training review in *Ready to Work: Job-Driven Training and American Opportunity*. July 2014. Washington, DC: The White House.

WIOA Implementation Resources

[Aligned by Design: WIOA and Adult Education](#)

This brief provides a short overview of key features of the Workforce Innovation and Opportunity Act (WIOA) and outlines some key areas for alignment and opportunities where the public workforce and adult education systems can work together.

[WIOA: What Human Service Agencies and Advocates Need to Know: Advancing economic opportunities for low-income adults and youth](#)

Center for Law and Social Policy brief on the Workforce Innovation and Opportunity Act (WIOA) and Human Services Agencies.

[Heartland Alliance WIOA Planning and Implementation Toolkit](#)

This toolkit includes a series of policy advocacy and resources that focuses on the homeless and other populations with barriers to employment.

Academic and Career Coaching

[A Resource Guide for College/Career Navigators or Those Interested in Starting a Navigator Program](#)

An annotated bibliography of implementation resources for College and Career Navigators prepared by the Aspen Institute's Workforce Strategies Initiative for Participants in the C2C Consortium.

[The ABC's of College Navigation Guide](#)

Seattle Jobs Initiative primer on implementing College and Career Navigation services.

Basic Skills and Job Training Innovation

[LINCS \(Literacy Information and Communication System\)](#)

Online repository of adult education and workforce curricula and professional development for low skilled adult population and community forums for discussion of particular topics, such as career pathways.

[What Works In Job Training: A Synthesis of the Evidence](#)

A research and practice synthesis of the evidence on effective employment and training-related programs for adults and youth prepared by the Secretaries of Labor, Commerce, Education and Health and Human Services, with input from several other Federal agencies and staff.

[Making Skills Everyone's Business: A Call to Transform Adult Learning in the United States](#)

This report presents a national action plan on adult skills research and practice synthesis for making adult skill development—upskilling—more prevalent, efficient, effective, and convenient. *Making Skills Everyone's Business: A Call to Transform Adult Learning in the United States*. (2015). Washington, DC: U.S. Department of Education, Office of Career, Technical, and Adult Education.

[Farther, Faster: Six Promising Programs Show How Career Pathway Bridges Help Basic Skills Students Earn Credentials That Matter](#)

Center for Law and Social Policy brief on basic skills accelerated, contextualized, and concurrent enrollment strategies.

[Designing Meaningful Developmental Reform](#)

Community College Research Center practitioner packet on developmental education reform.

Skill Assessments

[The Workforce Innovation and Opportunity Act \(WIOA\)](#)

The WIOA Resource Page provides information and resources for States, local areas, non-profits and other grantees, and other stakeholders to assist with implementation of the Act.

[StrengthsFinder Assessments](#)

Assessment tools created by Gallop that help people discover their unique combination of strengths and identify their talents.

[ACT: WorkKeys](#)

Assessments to measure essential workplace skills, including measures of both “hard” and “soft” job skills, and help people build career pathways.

[Online Work Readiness Assessment Tool](#)

OWRA is a web-based tool for social service agency caseworkers to create a plan for participants that summarizes their strengths and barriers, and makes recommendations on placement into work activities and work supports. Funded by the U.S. Department of Health and Human Services, Administration for Children and Families, Office of Family Assistance.

[Skills Profiler](#)

A career aptitude test that matches skills to job types that use those skills.

Job Readiness Training and Curricula

[East Baltimore Pipeline: Job Readiness Training Curriculum](#)

A four-week job readiness curriculum funded by the Annie E. Casey Foundation.

[Empower Your Future: Career Readiness Curriculum Guide](#)

Aligned with the Massachusetts Career Development Benchmarks, this career readiness guide includes comprehensive lesson plans that contain a variety of lessons and activities.

[STRIVE: Attitudinal and Job Readiness Training](#)

A four week workshop that delves into the root causes of a person’s inability to obtain and keep a job, mentoring participants towards the attitudes and workplace behaviors they need to overcome employment obstacles and transform their lives.

[Winning New Jobs: A Promising Job Search Program for Unemployed Workers](#)

Overview of the Winning New Jobs project to adopt, implement, and evaluate a highly acclaimed job search program in three communities with persons who have been displaced or recently unemployed.

Network and Connect to Employers

[The Beginner's Guide to Social Media](#)

A comprehensive social media resource to help people of all skill levels to improve their social presence.

[Guide to Job Search Networking](#)

Ideas and strategies on meeting people and becoming comfortable attending meetings.

[Neighbors-helping-Neighbors USA](#)

A cost-free, grassroots, nationally and internationally recognized job search support and networking organization.

Sample Documents

[Sample Resume Template – Brazos Valley Council of Governments](#)

Brazos Valley Council of Governments uses this template for FSS participants to create their own resumes.

5

Helping FSS Participants Build Assets and Financial Capability



5. Helping FSS Participants Build Assets and Financial Capability

Asset Building and Financial Capability

[Reflections on the Experience of Launching an Asset Building and Financial Capability Model for the Family Self-Sufficiency \(FSS\) Program](#)

This paper reflects learning and insights from Compass Working Capital's work in partnering with local housing authorities and nonprofit housing organizations in New England to implement and advance a new, asset building and financial capability model for the federal Family Self-Sufficiency (FSS) program. *Reflections on the Experience of Launching an Asset Building and Financial Capability Model for the Family Self-Sufficiency (FSS) Program*. (November 2015). Compass Working Capital.

Financial Capability Services Providers

[Memorandum of Understanding Between the U.S. Department of Housing and Urban Development and the Internal Revenue Service](#)

This Memorandum establishes a partnership to promote a national tax assistance program using the IRS Volunteer Income Tax Assistance (VITA) Program.

[National Foundation for Credit Counseling](#)

NFCC connects consumers nation-wide with certified credit counselors.

[Get Free Tax Prep Help](#)

The IRS provides a zip code-based locator for Volunteer Income Tax Assistance programs.

[National Council of La Raza](#)

Local NCLR affiliates provide services to low-income Latinos ranging from financial counseling to homeownership counseling and support.

[Housing Counseling](#)

HUD provides support to a nationwide network of Housing Counseling Agencies (HCA) and counselors.

[FSS Chapter of HUD's Housing Choice Voucher Guidebook](#)

For a good basic overview of the FSS program regulations, Chapter 23 of HUD's Housing Choice Voucher (HCV) Guidebook describes the rules applicable to the HCV FSS program as of 2001 in a 'plain language.'

[Consumer Financial Protection Bureau](#)

In addition to its role as a financial regulator and watchdog, the CFPB provides information and tools to help consumers make sound financial decisions and help those who serve consumers provide financial education and counseling.

[American Credit Counseling Services \(ACCS\)](#)

ACCS provides credit and financial counseling for free over its toll-free phone line and provides free seminars for organizations.

[Consumer Credit Counseling Services \(CCCS\)](#)

CCCS provides consumer credit and financial counseling and has several local offices. Local Consumer Credit Counseling agencies or branches are available in many communities.

Financial Capability Training and Resources for FSS Staff

[Your Money, Your Goals](#)

A toolkit provided by the Consumer Financial Protection Bureau (CFPB) to assist social service organization staff in discussing financial health and practices with participants, providing financial coaching or education, and credit support activities. The toolkit is modular (i.e., service coordinators can incorporate any or all topics from the toolkit) and aims to help coordinators increase client financial empowerment.

[Building Financial Capability: A Planning Guide for Integrated Services](#)

An interactive guide to help community-based organizations interested in integrating financial capability services into existing programs (e.g. housing, job training, or Head Start), created by the HHS-funded Assets for Independence (AFI) initiative. A video training series is also available as a companion to the guide.

[Measuring Financial Health: 8 Key Indicators](#)

Assessment tools from the Center for Financial Services Innovation (CFSI) include this 1-hour webinar geared toward helping organizations measure client financial health.

[NeighborWorks America](#)

Prospective homebuyer information and calculators.

[Owning a Home: Tools and resources for homebuyers](#)

Free tools and resources to help homebuyers make financial decisions.

[Change Machine](#)

An online financial coaching platform with self-paced lessons covering a six-part framework for financial security, including tools, tips, and coaching strategies tailored for coaches working with specific financially vulnerable populations.

[Financial Practices and Well-Being Survey – Compass Working Capital](#)

A nonprofit asset-building organization headquartered in Boston, MA that runs several FSS programs in partnership with PHAs and private owners of multifamily assisted housing, Compass Working Capital uses this detailed financial practices questionnaire to create a participant's "financial profile." The financial profile details a participant's current financial health, financial practices, plans, barriers and worries, and aspirations. Compass then administers a portion of the questionnaire annually to measure progress in financial knowledge, confidence, and practices.

Financial Capability Training and Resources for FSS Participants

[Virtual Goal Coach](#)

An online tool containing links to resources that can help families achieve their employment, financial, education and homeownership goals.

[PowerPay](#)

This resource provides tools to families to develop a personalized, self-directed debt elimination plan.

[Vertex42](#)

This resource provides free budget templates, financial calculators and other debt reduction and money management tools.

[NerdWallet](#)

This article reviews additional budgeting and savings tools – many for free – designed to help consumers save more and spend less.

[Navigating Student Debt with Low-Income Borrowers: Insights for Financial Counselors and Coaches](#)

This brief by Compass Working Capital summarizes learning on how to help people who are dealing with student debt.

FSS Escrow

[FSS Chapter of HUD's Housing Choice Voucher Guidebook](#)

For a good basic overview of the FSS program regulations, Chapter 23 of HUD's Housing Choice Voucher (HCV) Guidebook describes the rules applicable to the HCV FSS program as of 2001 in a 'plain language.'

[Escrow Account Credit Worksheet](#)

FSS program coordinators may also benefit from consulting this optional form developed by HUD that can be used to calculate the escrow credit earned by FSS participants. After enrollment in FSS, escrow credit must be determined at each reexamination and interim determination. The worksheet provides a step by step roadmap for completing the escrow calculation. PHAs may also develop their own version of the worksheet.

Homeownership and Other Housing Transitions

[HUD Approved Housing Counseling Agencies](#)

HUD sponsors housing counseling agencies throughout the country that can provide advice on buying a home, renting, defaults, foreclosures, and credit issues.

Sample Documents

[Sample Personal Financial Statement – Compass Working Capital](#)

This sample financial statement from Compass Working Capital shows an FSS participant's monthly financial update. It lists and lays out in a graph all of the monthly sources of cash inflows and outflows, as well as the participant's assets and debts.

[Sample Budget Template – Brazos Valley Council of Governments](#)

This sample budget template used by Brazos Valley Council of Governments is formatted to calculate a family's net income, based on budgeted costs associated with home expenses, transportation, health, charity/gifts, daily living, entertainment, savings, obligations, subscriptions, and other miscellaneous items.

6

Building an Effective FSS Infrastructure



6. Building an Effective FSS Infrastructure

Building Partnerships

[Promoting Partnerships to Utilize Housing as a Platform for Improving Quality of Life \(PIH Notice 2011-51\)](#)

This notice outlines suggested ways to forge partnerships with public and private agencies at the federal, state, and local levels to promote resident connections to health care, education, employment, and other social services in an effort to improve quality of life and provide a foundation for successful housing outcomes.

[Applying for 501\(c\)\(3\) Tax-Exempt Status](#)

Information on establishing a 501(c)(3) nonprofit organization can be found on the IRS's website.

[2-1-1](#)

The 2-1-1 network is a national initiative to provide a centralized resource for people to learn about available supportive services in their community.

[Aunt Bertha](#)

This directory of government assistance and supportive service programs is searchable by zip code.

Relationship of FSS Programs to the PHA or Owner

[FSS Notices of Funding Availability \(NOFAs\)](#)

PHAs that receive FSS program coordinator grants from HUD must adhere to the requirements specified in the FSS NOFA announcing that funding. The NOFA also describes the circumstances under which FSS coordinators may take on other roles within the PHA.

Fundraising for the FSS Program

Federal Funding Sources

[Grants.gov](#)

The database of the federal government's notices of funding available for all federal programs.

[Federal & Foundation Assistance Monitor](#)

Consult the Federal Assistance Monitor for bi-monthly updates on federal grant opportunities, as well as available foundation assistance.

[HUD Funds Available](#)

This webpage identifies competitive funding opportunities, also known as Notice of Funding Availability (NOFAs), available through the U.S. Department of Housing and Urban Development.

[HHS Grants and Contracts](#)

This webpage lists federal funding opportunities through the U.S. Department of Health & Human Services.

[DOL ApprenticeshipUSA Investments](#)

This webpage lists federal funding opportunities through the U.S. Department of Labor.

[ED Grants](#)

This webpage lists federal funding opportunities through the U.S. Department of Education.

Online Directories for Private Funding Sources

[Foundation Directory Online](#)

The Foundation Center's comprehensive database a tools about grantmakers and the grants they have made.

[Corporation for National and Community Service \(CNCS\)](#)

A list of grant opportunities targeting poverty and low-income needs.

[Funding State by State](#)

The Grantsmanship Center's funding listing by state.

FSS Reporting to HUD

[The Inventory Management System/PIH Information Center \(IMS/PIC\) Family Self-Sufficiency \(FSS\) Reporting and FSS Program Portability Provisions \(PIH Notice 2016-08\)](#)

This Notice provides information on FSS reporting and portability including the circumstances under which PHAs must submit FSS Addendum reports to HUD, guidance and best practices on how to ensure accurate reporting to HUD about FSS, and requirements for handling families on FSS who exercise portability or move from one PHA program to another.

[FSS Addendum and Instructions](#)

PHAs are required to complete the FSS Addendum – Section 17 of HUD Form 50058 – for all FSS participants. Note that some of the instructions for completing this form have been superseded by PIH Notice 2016-08.

[The FSS Program Regulations \(24 CFR §984\)](#)

The FSS regulations specify the basic rules applicable to FSS programs administered by public housing agencies for the benefit of HCV holders and/or public housing residents.

[FSS Chapter of HUD's Housing Choice Voucher Guidebook](#)

For a good basic overview of the FSS program regulations, Chapter 23 of HUD's Housing Choice Voucher (HCV) Guidebook describes the rules applicable to the HCV FSS program as of 2001 in a 'plain language.'

[FSS Reporting Tool for Multifamily FSS Programs](#)

Multifamily FSS programs must use this tool, Attachment D in Notice H-2016-8, to report quarterly to HUD on FSS participants and their outcomes, and lists the documentation that owners must keep on file for HUD's review.

Tracking Outcomes

[HUD Congressional Justifications](#)

For up-to-date statistics on FSS program enrollment and outcomes in PHA-led FSS programs, see the discussion of FSS Coordinator Funding in the Congressional Justifications for the most recent HUD budget. The Congressional Justifications are available through the office of HUD's Chief Financial Officer.

[Aggregated Results of Logic Model and PIC Data Analysis](#)

An analysis of PIC Data and Logic Model outcomes for HCV FSS grantees for calendar year 2014.

[FSS Pro by HAPPY Software](#)

A software solution for tracking participants, maintaining escrow accounts, and producing required paperwork.

[Elite Family Self-Sufficiency module by Emphasys Software](#)

A software solution for assisting with administration of the FSS program.

[Tracking-at-a-Glance by Designing Success](#)

A software solution for conducting a needs assessment and generating an ITSP based on the needs assessment, tracking FSS services and activities, and tracking and reporting specific outcome measures.

[Efforts to Outcomes by Social Solutions](#)

A software solution for tracking client demographics and services, managing outcomes, and compliance reporting.

[AASC Online – FSS by Pangea](#)

A software solution designed to meet the unique needs of service coordinators working in senior and adult disability housing communities, provides automated outcomes tracking and real-time reporting.

[Online Work Readiness Assessment Tool](#)

OWRA is a web-based tool for social service agency caseworkers to create a plan for participants that summarizes their strengths and barriers, and makes recommendations on placement into work activities and work supports. Funded by the U.S. Department of Health and Human Services, Administration for Children and Families, Office of Family Assistance.

[TuaPath](#)

A career counseling and resources software program, TuaPath is developing a web-based tool to assist TANF participants with goal setting and attainment. The tool does not replace case management, but rather creates an opportunity to individualize case planning and automate frequent conversations like finding a child care provider.

Minimum FSS Program Size

[FSS Notices of Funding Availability \(NOFAs\)](#)

PHAs that receive FSS program coordinator grants from HUD must adhere to the requirements specified in the FSS NOFA announcing that funding. The NOFA establishes minimum guidelines for the number of FSS participants that programs must serve to qualify for specific levels of coordinator funding.

[The FSS Program Regulations \(24 CFR §984\)](#)

The FSS regulations specify the basic rules applicable to FSS programs administered by public housing agencies for the benefit of HCV holders and/or public housing residents, including detailed guidance on minimum program size.

[FSS Chapter of HUD's Housing Choice Voucher Guidebook](#)

For a basic overview of the FSS program regulations, see Chapter 23 of HUD's Housing Choice Voucher (HCV) Guidebook which describes the rules applicable to the HCV FSS program as of 2001 and includes detailed guidance on minimum program size.

[Family Self-Sufficiency Program in Multifamily \(HUD Notice H-2016-08\)](#)

This Notice implements the policies and procedures applicable to FSS programs administered in privately-owned HUD-assisted multifamily housing properties, including detailed information on program size.

Portability of FSS Participation

[Portability Chapter of HUD's Housing Choice Voucher Guidebook](#)

Chapter 13 of HUD's Housing Choice Voucher (HCV) Guidebook describes eligible families and the procedures for moving from one jurisdiction to another using portability.

[Housing Choice Voucher \(HCV\) Family Moves with Continued Assistance, Family Briefing, and Voucher Term's Suspension \(PIH Notice 2016-09\)](#)

This Notice provides guidance on PHA administrative responsibilities related to family moves with continued assistance both inside and outside the PHA's jurisdiction.

[The Inventory Management System/PIH Information Center \(IMS/PIC\) Family Self-Sufficiency \(FSS\) Reporting and FSS Program Portability Provisions \(PIH Notice 2016-08\)](#)

This Notice provides information on FSS reporting and portability including the circumstances under which PHAs must submit FSS Addendum reports to HUD, guidance and best practices on how to ensure accurate reporting to HUD about FSS, and requirements for handling families on FSS who exercise portability or move from one PHA program to another.

Sample Documents

[Sample FSS Program Performance Report – Compass Working Capital](#)

This sample FSS program summary report from Compass Working Capital highlights specific achievements of the program. Performance reports about FSS families such as this one can be used to build internal support for the FSS program among the Board and senior management

BUILDING AN EFFECTIVE FSS INFRASTRUCTURE

[Sample Quality Control Sample Methodology – Brazos Valley Council of Governments](#)

This is the methodology used by Brazos Valley Council of Governments to randomly sample participant files to verify that the agency is following their work-first case management procedures.

[Sample Quality Control Review Form – Brazos Valley Council of Governments](#)

Brazos Valley Council of Governments uses these questions to guide their quality control reviews.

[Sample Quality Control Executive Report – Brazos Valley Council of Governments](#)

This is an example of a quality control report produced by Brazos Valley Council of Governments that brings all three of their performance measures together, including (1) the accuracy of their FSS casework, (2) the rate at which they are transitioning participants from being unemployed to being employed, and (3) the rate of growth of the FSS Program as a whole.

[Sample Quality Control Outcomes Report – Brazos Valley Council of Governments](#)

This quality control report from Brazos Valley Council of Governments focuses on their primary goal of transitioning participants from unemployment to employment, based on a measurable threshold of earned income.

[Sample Quality Control Outputs Report – Brazos Valley Council of Governments](#)

This quality control report from Brazos Valley Council of Governments measures the accuracy of their casework in their FSS files.

[Sample Memorandum of Understanding between Any Town Housing Authority and the Community College District for Self-Sufficiency Programs – Nan McKay and Associates](#)

This Memorandum formalizes a partnership between these two entities to carry out specific roles and responsibilities pertaining to the FSS program.