



COMPASS
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Launching a Multifamily FSS Program Self-Assessment Tool

Use this self-assessment tool to assess and track your progress in developing your FSS program design and structure. This tool will help you determine the necessary steps to create an FSS Action Plan, progress through the launch process, and ultimately enroll FSS participants. Reconsider beginning FSS marketing and outreach if you have a score below 4 on any item in this tool.

For each question, provide a short description of your current status and a point-in-time self-assessment score. Rate your comfort with each item on a scale of 1-5. We have suggested some benchmarks below based on your progress with each item and on your level of knowledge.

- 1 - Not Started or Need More Information.** If you have not started this step or need more information, select (1).
- 2 - Just Started.** If you are at the beginning stages of the step, select (2).
- 3 - Partially Complete.** If you have made some progress on this step, select (3).
- 4 - Almost Complete.** If you are near completion of the step and have a clear near-term deadline, select (4).
- 5 - Complete or Do Not Need Information.** If you have completed this step and can effectively answer the associated questions, select (5).

Multifamily Housing Family Self-Sufficiency Program

Step Towards Launch		Description (Please respond in a few sentences)	Self-Assessment Score (Rate your readiness)
A.1	What funding have you identified for your FSS program? Owners can financially support an FSS program in a few ways: Using available residual receipts, corporate resources, third-party grants, or philanthropy. The primary expense for any program is personnel, specifically the FSS Coordinator. For information on funding options for the FSS program, see this page: https://www.hudexchange.info/programs/multifamily-fss/resources/funding-a-program/ .		
A.2	Do you anticipate being able to sustain this funding for the foreseeable future? If not, where do you plan to find additional funding to cover the costs of your program?		

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B.1	Have you selected the property where you plan to launch FSS? If so, explain why you chose this property(ies). For more information on selecting FSS properties, visit this page: https://www.hudexchange.info/programs/multifamily-fss/resources/launching-a-fss-program/		
B.2	What is the number of project-based Section 8 units at the selected property where the head of household is neither elderly nor disabled? What is your target enrollment? Past experience suggests that, when marketed effectively, enrollment in FSS at a multifamily property can reach a number at or above 30% of the number of project-based Section 8 households that are neither elderly nor disabled in a development. (Note that all household with a project-based Section 8 subsidy are eligible to participate in FSS, including household headed by people who are elderly or who have a disability.)		
B.3	Are there any new projects in the near future (e.g. a property rehabilitation or software migration) that would direct time or resources away from your FSS launch? Past experience suggests that launching an FSS program at or around the same time as another large initiative makes it difficult to give FSS the attention it needs, and if not avoidable, will require additional coordination and support to successfully execute.		
B.4	Have all staff at the property been notified about the FSS program launch? What are their feelings about the program? Past experience suggests that building buy in with property staff from the start leads to stronger program results.		

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C.1	What needs assessment data have you collected about residents, if any, about their interests and needs? Topics may include homeownership, childcare, transportation, credit building, job training, etc. This information will help you to design your services to meet the needs of program participants.		
C.2	Have you considered the types of services that your FSS program will offer? If so, please describe. You may choose to focus your services on a specific expertise such as financial coaching or career development. Alternatively, you may choose to serve as a general resource coordinator that primarily makes referrals to other organizations. For more information on types of services, review Chapter 3 in HUD's online FSS training: https://www.hudexchange.info/trainings/fss-program-online-training/		
C.3	How do you anticipate staffing your FSS program? Will you train existing staff or hire new staff? How much of your staff time will be dedicated exclusively to FSS? For information on staffing models for FSS, visit this page: https://www.hudexchange.info/programs/multifamily-fss/resources/staffing-a-program/		
C.4	Are FSS program staff hired and ready to be trained? Do you have questions about hiring or training FSS program staff?		
C.5	Do you have a network of community partners to whom you can refer participants for specific needs such as job training, financial education, utilities assistance, etc.? Are there any gaps in your current community partnerships?		

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D.1	Have you reviewed HUD's resources on escrow account administration? Are you familiar with the basics of escrow account management? For more information, visit the link below. https://www.hudexchange.info/programs/multifamily-fss/resources/escrow-account-management-fags/		
D.2	Have you engaged the appropriate staff from your property management/accounting teams to discuss these systems? Typically, these early conversations will include senior staff from your property management and accounting teams at the corporate level. This is because you will need to make some organizational decisions about how you will manage the escrow accounts.		
D.3	What systems will your organization use to manage participant enrollment and escrow? If your organization uses Yardi as its property management software, you can contact them about obtaining their FSS module. If you use another system, you can use the sample spreadsheets provided by HUD or create something on your own.		
D.4	Which staff members will calculate and manage escrow for your program? Who on your team will be the primary point of contact for escrow issues and auditing the accounts?		

Step Towards Launch		Description (Please respond in a few sentences)	Self-Assessment Score (Rate your readiness)
E.1	Have you reviewed both the reporting requirements in HUD's program notice and HUD's FSS Quarterly Reporting Tool for multifamily owners? This tool is Attachment D of HUD Notice H-2016-08. For more information on FSS reporting, visit this page: https://www.hudexchange.info/programs/multifamily-fss/resources/monitoring-and-reporting/		
E.2	Have you considered what other metrics, beyond HUD's requirements, you may want to collect on your program to understand program impact? You may consider tracking other metrics your program has been designed to support, including graduation rate, changing in earning and employment, changes in credit score, or reductions in debt.		
E.3	Do you have a system in place to track the data your FSS Coordinator collects during appointments with participants, including the participant information you need to report to HUD? This may include appointment notes and dates, resource referrals, requests for escrow disbursements, etc. Many organizations choose to use or adapt an existing system such as ETO or Salesforce, but you can also choose to build something new or begin by tracking information manually in Excel or Word.		

Step Towards Launch		Description (Please respond in a few sentences)	Self-Assessment Score (Rate your readiness)
F.1	Have you reviewed the FSS Action Plan requirements in HUD Notice H-2016-08? This resource can be found here: https://www.hudexchange.info/programs/multifamily-fss/resources/mfh-fss-resources/		
F.2	Have you drafted your FSS Action Plan, which includes your high-level FSS program design and policies? For more information, review HUD Notice H-2016-08: https://www.hudexchange.info/programs/multifamily-fss/resources/mfh-fss-resources/		
F.3	3. Have you convened your FSS team to review your draft Action Plan before submission? Because Action Plan submission is a major program milestone, it is a best practice to convene your FSS stakeholders to ensure everyone is aligned.		

Step Towards Launch		Description (Please respond in a few sentences)	Self-Assessment Score (Rate your readiness)
G.1	What training have you provided the team members who will be managing the day-to-day operations of your FSS program? This may include training on FSS rules and regulations, guidance on how to complete FSS contracts, support on escrow management, etc. To access HUD's training resources, visit this page: https://www.hudexchange.info/programs/multifamily-fss/resources/mfh-fss-resources/		
G.2	Have you developed an FSS Program Manual? The FSS Program Manual is not a HUD requirement, but we strongly recommend developing one before beginning program enrollment. It is your reference guide for all program policies and procedures and will also include appendices with the forms you'll use with FSS participants.		
G.3	What are your thoughts and ideas for FSS marketing and outreach? Past experience suggests that a "surround sound" approach that utilizes a variety of techniques (e.g. postcards, inserts in recertification letters, newsletter announcements, word of mouth, etc.) is most effective.		
G.4	Have you considered how you will structure a typical FSS appointment or how often you'll meet with FSS participants? If so, please describe. For more information on appointments, review Chapter 3 in HUD's online FSS training: https://www.hudexchange.info/trainings/fss-program-online-training/		