

User Guide for Project Plan Template

Permanent supportive housing (PSH) is a critical resource to help individuals and families with disabilities achieve stable housing, and over time, can help some get to the point where they no longer need or want intensive services. In most cases, however, the need for financial housing assistance remains a prohibitive barrier to leaving PSH. Moving On enables individuals and/or families who are able and want to move on from PSH to do so by providing them with a sustainable, affordable housing option and the services and resources they need to move on. Moving On can mean that the individual or family is able to transition in place to more independence in their current home or it can mean moving to a new home that is more convenient or closer to family and friends.

The Moving On Project Plan Template was created to help communities navigate the team-building, design, and planning efforts for a Moving On initiative. Please review all of the directions below before beginning to complete the Excel template.

Goal of the Project Plan Template. After completing the Project Plan Template, communities will have a solid action plan with steps and deadlines detailing how the community can create and implement a local Moving On initiative.

When to use the Project Plan Template



To start planning

Local leaders can use the template as a catalyst for discussion and community innovation around opportunities for PSH tenants to move on. This tool, along with the **Resources Inventory**, can help innovators build their leadership team, marshal resources, design an initiative that meets local needs, and outline concrete action steps to help move from design to implementation.



During planning

A local planning team that has already begun work to form a Moving On initiative can also use the template to document progress made on planning, consider additional partners or resources they may not yet have engaged, and formalize the structure for the proposed initiative.

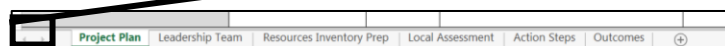


For scaling/
sustainability planning

Communities that have Moving On pilots or programs in place can use the template to begin to develop a plan for a scaled, sustainable iteration of their initiative.

How to Use the Project Plan Template

- There are six tabs in the document: an overview tab - **Project Plan** - and five tabs each focused on a different aspect of planning - **Leadership Team**, **Resources Inventory Preparation**, **Local Assessment**, **Action Steps**, and **Outcomes**. Users can navigate through the list of tabs using the arrows in the bottom left corner of the Excel window.



- Sections in the document that are white are meant to be filled in by the community. Yellow boxes indicate instructions – these are reminders for each tab, but please refer to this document for full instructions.
- Suggestions on what communities might include as they plan their Moving On initiatives are pre-filled into each chart. These are just suggestions, and communities can feel free to use, modify, or delete any of this suggested text.
- Ideally the document will be shared in an application that allows team members to make and view each other’s edits in real time (i.e. Google Docs, Dropbox, etc.), and can be updated electronically during leadership team meetings. In the event that group members prefer printouts, each chart is sized so that it can be printed horizontally (landscape mode) on legal size (11½ by 14) paper.

Stakeholder Engagement

Successful Moving On initiatives require buy-in from a variety of stakeholders. Some of the **stakeholders** that you should consider partnering with and gathering data from are:

Continuum of Care (CoC)	Can convene partners and lead initiative design, implementation, and monitoring.
Public Housing Agencies	Can provide access to Housing Choice Vouchers (HCVs), Public Housing units, and/or other housing resources. Teams should engage all PHAs in the geographic area they serve.
Local government housing/human services agencies	Can provide access to resources and support design, implementation, and monitoring of initiative.
Permanent supportive housing (PSH) providers	Can help identify barriers that clients face and ensure that services and structure of initiative are responsive to local needs. In implementation, can identify, assess, and provide services to tenants looking to move on.
PSH tenants and persons with lived experience	Can provide insight into needs, experiences, and other considerations useful to developing a program and package of services that adequately addresses the service and resource needs of PSH tenants.
HUD Multifamily Building Owners (private, non-profit sponsors)	Can provide access to HUD Multifamily Assisted buildings (Including Supportive Housing for the elderly and persons with disabilities Section 202 and 811 programs) for Moving On clients.
Affordable housing developers, owners, and operators	Can provide access to affordable housing units in existing buildings, or develop set asides for buildings that are leasing up.
Local human service, healthcare, and mental health providers	Can provide access to services, supports, and resources to Moving On clients during and after their transition.
Local funders, incl. foundations and funding collaboratives	Can provide funding and other resources for services and tenant financial supports.
Local landlords	Can provide access to private market units for vouchers.

Information Gathering

Some of **information-gathering methods** include:

- Discussions/interviews with key stakeholders
- Document review – looking through key documents such as current or past PHA Administrative Plans and Admissions and Continued Occupancy Policies, HUD Multifamily Assisted Unit Tenant Selection Plans

- Focus groups, input sessions, or other methods of gathering stakeholders to gather input to help inform or refine the design of the initiative
- Surveys of key stakeholders – online, over the phone, in-person, or using other methods, as appropriate based on the target audience and information to be collected.

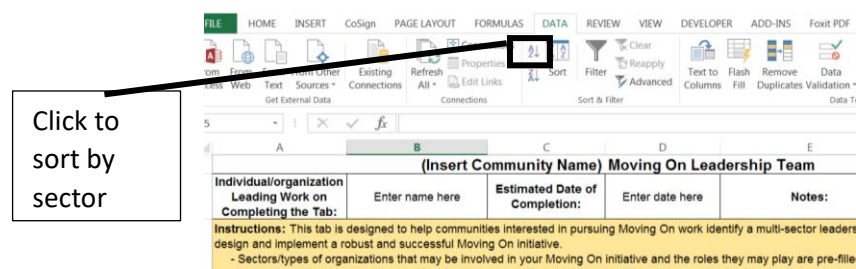
Tab by Tab Instructions

- Project Plan Template

- This tab provides an overview of key steps in the planning process, responsible parties, deadlines, notes, and status. Information in this cover tab will auto-populate into the top rows of the tabs that follow.
- The team that is working on completing the Project Plan Template should designate a lead person or agency to be responsible for completing each of the tabs in the workbook. The full group’s input will be needed to complete each of the tabs, but having a designated leader for each one will help to divide the responsibility so that it does not all fall on a single person or organization to keep the team on task. In some communities the lead may be the same person/organization for many or all of the tabs; this is fine as long as that person/organization has the capacity and expertise to lead in each of the areas.

- Leadership Team

- This tab is designed to help communities interested in pursuing Moving On work identify a multi-sector leadership team comprised of stakeholders that can help to design and implement a robust and successful Moving On initiative.
- Suggestions on the sectors/types of organizations that may be involved in your Moving On initiative and the roles they may play are pre-filled in this chart. These are just suggestions and the list is not exhaustive. Communities should use, modify, or delete any of the pre-filled items to reflect the community’s leadership team.
- Some communities may have multiple PHAs within the geographic area they cover; these communities should add an additional line for representatives of each PHA that they have or hope to engage (communities should attempt to engage all PHAs in their jurisdiction). To sort the list so that groups from the same sector (e.g. all PHAs) are grouped together, template users should click on the ‘Data’ tab in Excel and hit the ‘Sort A to Z’ Icon.



- Communities should note that there may be multiple representatives from a given sector or agency on the leadership team, or there may be partners that should be engaged, but do not have the capacity or ability to play a role on the leadership

team. Such partners can be tapped at different parts of the planning and implementation processes for input and support.

- The leadership team may consider designating a CoC representative familiar with the community to project manage the team and the process throughout.
- Resources Inventory Preparation
 - This tab is designed to help you prepare to complete the **Resources Inventory**, a separate tool, which allows a community to compile a list of the resources that can be used for Moving On and identify gaps that need to be filled.
 - This tab includes pre-filled questions that the leadership team may ask itself and relevant stakeholders in order to identify what resources are needed for the initiative, what is already available, and which stakeholders should be engaged in order to further discussions about resources. All of the prefilled items in the chart are suggestions, and communities can feel free to use, modify, or delete any of the items that are not relevant to the community's Moving On initiative.
 - A note about the first two questions – the inquiries about site-based/single-site and scattered-site PSH units are meant to help the leadership team understand the landscape. This provides a general sense of the universe of potential clients (all clients in supportive housing). The question about scattered-site units is meant to help the leadership team understand what level of demand there may be for 'transition in place' moving on, in which scattered-site tenants who are ready and want to move on from services are given the option of continuing to live in their current unit with a different housing subsidy. In all cases, tenants in scattered-site housing should still have the option to move to a new location, if that is what they prefer. If a community's PSH stock is largely scattered-site, leaders should factor that into consideration when making determinations about the amount of moving-related resources (e.g. housing navigation, application fees, movers, etc.) needed for the initiative.
 - The leadership team may consider designating the local PHA, or in cases where there are multiple PHAs or affordable housing providers with a large inventory in an area, the government agency that oversees housing, as the lead for completing this tab, because answering most of the questions will require access to and information from the PHA(s).
- Local Assessment
 - This tab provides space to track questions that communities want to answer as they design the services packages that will be offered to Moving On tenants, as well as the design of efforts to train and support PSH staff that will be working with tenants.
 - There are several questions for consideration built into the template, based on the experience of other communities implementing Moving On. These are suggestions, and communities can choose to use and/or edit any or all of these questions and associated information, and to insert additional questions/methods of collecting information as appropriately locally.
 - The leadership team may consider designating a PSH provider or other leadership team member with expertise in services and program design and access to PSH providers and tenants as the lead for completing work on this tab.

- Action Steps
 - This tab is designed to help communities identify the key action steps they need to undertake in order to design and operationalize a Moving On initiative.
 - Several suggested action steps are built into the work plan in the order that they should happen, based on what has happened in other communities implementing Moving On. These are suggestions, and communities can choose to use and/or edit any or all of these steps, and insert additional steps.
 - The leadership team may consider gathering additional community stakeholders and feedback as part of the process of developing the action steps, which will guide the design for the actual implementation of the initiative.

- Outcomes
 - This tab is designed to help communities identify outcomes that they want to track in their Moving On initiative.
 - There are two pre-filled outcomes that all communities should track; communities may also choose to add additional outcomes they are interested in capturing.
 - The leadership team may consider designating a CoC representative familiar with the community's outcomes/tracking process as the lead for completing work on this tab. The team may also consider engaging academics or consultants around the possibility of developing an evaluation for the initiative.
 - For more suggestions on outcome measures that Moving On initiatives can track, please refer to the Program Evaluation and Performance Tracking section in Chapter 9: Oversight, Governance, and Evaluation, in CSH's Moving On Toolkit (<https://www.csh.org/resources/csh-moving-on-toolkit/>).

Resources

Communities may consider consulting the following resources as they complete the project plan template:

- Moving On Toolkit. CSH. Available at: <https://www.csh.org/resources/csh-moving-on-toolkit/>
- Opening Doors Through Multifamily Housing: Toolkit for Implementing a Homeless Preference. HUD. <https://www.hudexchange.info/resource/4810/opening-doors-through-multifamily-housing-toolkit-for-implementing-a-homeless-preference/>
- CoC and PHA Collaboration: Strategies for CoCs to Start the Partnership Collaboration. HUD. Available at: <https://www.hudexchange.info/resources/documents/CoC-and-PHA-Collaboration-Strategies-for-CoCs-to-Start-the-Partnership-Conversation.pdf>