Presenters

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Agenda

- Rationale for training
- Housing-based case management definitions
- Elements of successful housing/residential case management
- Housing resources
- Group discussion/best practices from the field
Rationale for training

- Agencies with multiple programs, some housing focused and some not
- Lack of supervisory support that stresses housing as a key social determinant of health
- Client to worker ratio doesn’t allow for the length of time required to also focus on housing
- For clients who are housed — although not necessarily stable — the housing issue often takes a back seat to more pressing health/mental health concerns
Definition of case management

First, we need to define case management:

☐ Engagement
☐ Assessment and goal-setting
☐ Service Coordination
☐ Resource Development/Advocacy
☐ Follow-up
☐ Reporting
Case manager roles

Key case manager roles:

- Building trust
- Tracking residents’ whereabouts and progress
- Helping residents qualify for/maintain public benefits
- Facilitating access to care: arranging, accompanying, and teaching residents to manage the system
- Identify early signs of decompensation and doing whatever it takes to resolve behaviors that can lead to negative consequences
Let’s discuss case management in terms of health outcomes for housing-based case management.
Housing and health outcomes

HIV/AIDS research shows:

- Housing status predicts HIV treatment success or failure
- Access to housing enables PLWHA to get into care and stay in care
- These results are relevant to other client populations, too - stable housing results in better health/mental health outcomes
What this connection means for local practice:

- Housing status is likely the most important characteristic of each new client – the most significant determinant of each person’s health and risk outcomes.

- Case management must include some focus on housing assessment, placement, and housing stability.
Case management methods/models

Some well-known case management models:

- Broker Case Management
- ICM: Intensive Case Management
- ACT: Assertive Community Treatment
- CCT: Continuous Treatment Teams
Supportive housing and case management:

- All SHP models include case management
- The “level” of case management intensity and recommended caseloads will vary by population

Example: An Intensive CM or ACT model is typically recommended, at least initially, for programs serving persons with severe and persistent mental illness. An appropriate staff/client ratio for this type of program would be around 1:10.
Elements of successful housing/residential case management

- Definitions
- Roles
- Tools
- Discussion
How is housing-based case management different than any other type of case management?

- Added focus on:
  - Housing readiness measures: are they ready?
  - Housing stability measures: how stable are they?
  - Development of ongoing housing-related goals that emphasize not only acquisition of housing, but ongoing stability.

*Housing is an ongoing focus – not just when seeking housing or during a crisis!*
Basic case management components

- Engagement
- Assessment
- Goal-setting
- Service Coordination
- Resource Development/Advocacy
- Follow-up
- Reporting
Housing-based case management

Goal: Helping clients to secure and maintain stable, affordable housing.

- For clients not currently in safe, decent, affordable housing, the primary goal is to develop a strategy to assist them in securing housing.

- For those already housed, the goal is to assure that adequate supportive services are in place so the client can maintain housing.
Engagement

Being homeless or marginally housed is connected to:

- Loss of power
- Loss of role
- Loss of connection
- Lack of nutrition/sleep

All of these experiences make it more challenging to engage the client in a trusting, productive relationship.
Engagement is KEY!
Without a connection, your effectiveness will be limited. Don’t rush this step!

- Question: What methods have you used to engage hard to reach clients? Those who are distrustful?
Housing-based case management

Client engagement
Making a connection – gaining trust

Housing readiness and services needs assessment
An in-depth review of client needs and desires
Assessment

- History: What actions, behavior or circumstances led to housing problems?
- In what setting has the client been happiest and most stable? What settings did not work?
  - Permanent, independent
  - Supportive housing
  - Community residence or other
- What supports will this client need in order to enter and remain stable in housing?
Step 1: Learn about the client.

- History
  - Past housing experiences: what worked best? What were the struggles? What issues interfered with housing stability?
  - What is the client’s ability to negotiate systems, solve problems, and access services?

- Choices, preferences, aspirations
  - Bottom line now vs. hopes for the future (ex. homeownership)
  - Preferences (neighborhood, size of apartment, amenities)
Step 2: Share information with the client

- Housing realities and available options
  - Educate on all available housing options

- Expectations of tenancy
  - Rent payments, house rules, visitors, maintenance

- Discuss skills and support needed to maintain chosen housing options

- Introduce housing stability – not just obtaining housing – as a service goal
Suggestions

- Use a **checklist of barriers** with the client and use this information to guide the rest of the discussion.

- Develop a **housing history** by reviewing the client’s housing situations over the past several years.
Housing readiness assessment (continued)

Barriers Checklist example:

- No rental history
- Eviction(s) ___
- Large family (3+ Children)
- Single parent HH
- Head of HH under 18
- Sporadic employment history
- Recent criminal history
- Debts/insufficient savings
- No high school diploma/GED
- Insufficient/No income
- No or poor credit history
- Debts
- Repeated/chronic homelessness
- History of substance abuse/use
- History of abuse (client fleeing abuser)
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<td>Staying/living in a family member’s room, apt., etc.</td>
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<td>Hotel or motel</td>
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<td>Place not meant for habitation</td>
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Even when housed, is the client really stable?

Incorporate a regular housing burden check:

- Calculate current housing burden: Monthly rent and utility cost/monthly household income
- 30% of gross income is considered affordable
Housing stability check (continued)

Rent burden example:

- Monthly rent & utilities = $600
- Monthly household income = $1,200
- $600 / $1,200 = 50%

This household is spending 50% of its monthly income on rent and utilities. This is considered to be severely housing burdened.
Housing stability — other factors

- Other stability factors to consider:
  - Debt and other high expenses
  - History of past evictions
  - History of homelessness
  - Recent history of substance abuse
  - Mental health issues
  - Short time in current housing (< 6 mos.)
Housing and services needs assessment
Information to guide the planning discussion

Housing services plan
Documents client goals, resources needed, and expected assistance from the case manager
Goal-Setting: Housing Services Plan

- Understanding the client’s housing preferences
- Reviewing realistic options
- Finding the right “fit”
- Goals reflect the steps needed to get into and successfully stay in housing

This is an opportunity to assist clients with budgeting, assess credit/debt, and establish plans for clients to manage/save money!!!
Housing-specific goals

- The housing plan should incorporate specific, measurable, attainable goals related to:
  - Obtaining housing
  - Maintaining housing
  - Issues of income, employment and money management
  - Independent living skills
  - Obtaining needed treatment for substance abuse, mental health issues, etc.
  - Future-oriented housing goals
Future-oriented housing goals

Homeownership for special needs clients:

- Many people want this in the future
- Setting a realistic future goal is motivating
- Even for those not yet ready for homeownership, the stepping stones will be beneficial to their rental housing stability
  - Budgeting, saving, reducing debt, repair credit history, increasing income, increasing independence
Plan for achieving goals

Key elements:

- Time frame
- Specific outcome to achieve
- Support needed to achieve goal
- Tasks to be accomplished by client and case manager
Service Coordination

- Connecting clients to the support services needed to achieve and maintain housing stability
- Monitoring client progress in housing and making service adjustments as needed.
Client as Tenant and Program Participant:

- Does the client pay rent on time each month?
- Utilities?
- Any landlord complaints on condition of the unit or disturbance to neighbors?
- Program violations?
- If so, what steps are necessary to resolve the issue(s)
Client as a Good Tenant and Neighbor:

- Has the landlord communicated any complaints or concerns to the client? To the program?
- Does the client have complaints regarding the landlord or neighbors?
Monitoring Stability – Issues to Consider

Does the Client Need Assistance With:

- Money management – able to pay rent, cash checks, budget
- Ability to understand and follow lease/house rules
- Housekeeping skills/shopping/cooking skills
- Social skills – ability to maintain positive relationships
- Communication skills
- Awareness of service needs and ability to seek and accept help
Resource Development

- Listings of affordable housing
- Listings of openings in supportive housing programs
- Relationships with landlords

**Question:** What housing resources do you identify for your clients?
- Vouchers, HOME, LIHTC, USDA properties

**Question:** Is there a housing resource specialist on your staff?
Maintaining/tracking housing stability

Discussion:

- How to track and document client acceptance into housing?
- How to keep tabs on the stability of clients placed in housing?
- Ideas on what will work?
Discussion:

- What are creative ways to engage in follow up with our clients?
  - Peer support groups
  - Case manager drop-in hours but no set appointments after 6 months
  - Monthly telephone/email correspondence
  - Pot luck dinners
Let’s hear from you...

**Questions:**

- What has worked for you re: housing-based case management?
- What challenges have you faced in implementing housing-based case management?
- Examples of best practices
Questions???
For more information...

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