THE SEVEN DIMENSIONS OF QUALITY FOR SUPPORTIVE HOUSING

QUALITY ASSESSMENT TOOLS

For more information, please contact quality@csh.org or visit www.csh.org
First Edition: February 2009

CSH is pleased to make available this First Edition of The Seven Dimensions of Quality for Supportive Housing: Quality Assessment Tools. CSH is committed to continuing to engage in, and learn from, constructive dialogues regarding issues of quality with our partners in the housing, supportive services, advocacy, and disability rights communities, with tenants of supportive housing, and with all those engaged in efforts to end homelessness. Based upon these ongoing discussions and learning experiences, we expect to make modifications to this information within revised editions in future years, which will be made available at www.csh.org/DimensionsofQuality.

About the Corporation for Supportive Housing

The Corporation for Supportive Housing (CSH) is a national non-profit organization and Community Development Financial Institution that helps communities create permanent housing with services to prevent and end homelessness. Founded in 1991, CSH advances its mission by providing advocacy, expertise, leadership, and financial resources to make it easier to create and operate supportive housing. CSH seeks to help create an expanded supply of supportive housing for people, including single adults, families with children, and young adults, who have extremely low-incomes, who have disabling conditions, and/or face other significant challenges that place them at ongoing risk of homelessness. For information regarding CSH’s current office locations, please see www.csh.org/contactus. For more information about CSH’s consulting and training services, please contact the CSH Consulting Group at consulting@csh.org.

Acknowledgements

CSH wishes to acknowledge all those who participated in conversations and discussions that helped to shape the definitions and indicators for these Dimensions of Quality for Supportive Housing, and most especially wishes to thank those tenants of supportive housing across the United States who generously shared their experiences and perspectives.

Inquiries

If you are interested in learning more, please see www.csh.org for additional on-line resources and materials, including information regarding the communities in which we currently work. If you have questions or comments regarding this document, please contact CSH at quality@csh.org or info@csh.org. This document is available to download for free at www.csh.org/publications or at www.csh.org/DimensionsofQuality.

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Information provided in this publication is suggestive only and is not legal advice. Readers should consult their government program representative and legal counsel for specific issues of concern and to receive proper legal opinion regarding any course of action.

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Overview, Purpose, and Goals

Through communication with supportive housing tenants, providers, funders, and other stakeholders - and through involvement in successful supportive housing projects around the country - CSH has identified the following Seven Dimensions of Quality that can serve as a common framework among developers, property managers, service providers, and funders for assessing – and investing in – the quality of supportive housing units:

 Dimension #1: Administration, Management, and Coordination
 Dimension #2: Physical Environment
 Dimension #3: Access to Housing and Services
 Dimension #4: Supportive Services Design and Delivery
 Dimension #5: Property Management and Asset Management
 Dimension #6: Tenant Rights, Input, and Leadership
 Dimension #7: Data, Documentation, and Evaluation

This document contains a separate Assessment Tool for each of the Seven Dimensions of Quality. Each Assessment Tool is intended to help organizations to identify areas for improvement of the quality of the supportive housing opportunities being assessed. Further, CSH hopes that organizations will use these tools to guide the development and implementation of quality improvement action plans.

Prior to using the Assessment Tools provided within this document, organizations are encouraged to review The Seven Dimensions of Quality for Supportive Housing: Definitions and Indicators, available on CSH’s website at www.csh.org/DimensionsofQuality. That document includes descriptions of the defining elements of a supportive housing unit and discusses the applicability of the Dimensions of Quality to a range of housing settings, models, and strategies and to a diversity of approaches to service delivery. In addition, that document provides for each Dimension of Quality: the definition; descriptions of Key Indicators of Quality; descriptions of Additional Indicators of Quality; discussion of the applicability of the Dimensions and Indicators to scattered-site, master-leased, or tenant-based supportive housing initiatives; and information regarding staff development and training topics that can help support the achievement of quality.

In advancing such a focus on quality for supportive housing, CSH’s goal is to assist the supportive housing industry – including developers, housing management organizations, service providers, funders, and other stakeholders - to strengthen its practices and to achieve the highest level of quality across these seven Dimensions. These Dimensions of Quality are not intended to endorse or measure adherence to specific services or housing models and it is important to note that the applicability of certain Dimensions – and how quality should be assessed – will vary depending upon the models of supportive housing being implemented. CSH’s purposes for describing these Dimensions and Indicators of Quality include:

- To build the capacity of the supportive housing industry to create and operate high-quality, effective, and sustainable supportive housing units;
- To encourage the investment of adequate resources – especially from public systems - to support that capacity;
- To help ensure that existing resources for supportive housing are being used efficiently and effectively, and to support the allocation of new resources; and
- To help ensure better outcomes for supportive housing tenants, especially those with multiple barriers to housing stability.
Using the Quality Assessment Tools

This document contains a separate Assessment Tool for each of the Seven Dimensions of Quality. These Assessment Tools provide: definitions; guidance regarding materials that will be needed to complete the assessment; descriptions of Key Indicators of Quality; questions to consider regarding the Key Indicators of Quality; descriptions of Additional Indicators of Quality; and information regarding staff development and training topics that can help support the achievement of quality.

Organizations using these Assessment Tools should be aware that some of the Indicators of Quality are applicable to, and therefore repeated for, multiple Dimensions of Quality. This repetition allows each Dimension's Assessment Tool to be a comprehensive, stand-alone document that can be used alone or in conjunction with the other Assessment Tools. Each tool also provides a rating scale that organizations should use to assess current achievement of quality for each Indicator:

A - No Improvement Needed
B - Minimal Improvement Needed
C - Improvement Needed
D - Significant Improvement Needed

The rating scale is designed to assist organizations to identify the areas where they may wish to focus their quality improvement efforts and resources. When these Assessment Tools are being used to assess existing supportive housing, the rating scale can be used to assess current practices and to identify areas in which practices can be improved. When these Tools are being used to assess and guide the planning of new supportive housing units, this scale can be used to assess preparedness to achieve quality, and to identify areas in which additional planning and effort will be needed to ensure that quality will be achieved. It is important to note that the use of the rating scale is not intended to produce an overall "score" or rating, and that these Assessment Tools have not been designed to produce such results.

CSH does emphasize that the Key Indicators of Quality are especially critical to ensuring the quality of supportive housing; therefore, CSH encourages organizations to prioritize their quality improvement efforts by focusing first on alignment with the Key Indicators of Quality. Throughout these Assessment Tools, users will find Questions to Consider for each Key Indicator of Quality. These questions are provided to assist organizations to thoughtfully consider important facets of quality for supportive housing, but a negative response to one or more of these questions does not necessarily mean that there is not significant alignment with the Indicator.

Organizations using these Assessment Tools are also encouraged to consult both the additional resources from CSH identified on pages 84 and 85 of this document, as well as The Seven Dimensions of Quality for Supportive Housing: Additional Materials and Resources, available at CSH’s website at www.csh.org/DimensionsofQuality, for links to a wide variety of publications, training materials, and other tools and resources. These materials and resources should prove helpful both for developing a deeper understanding of the Dimensions and Indicators of Quality, as well as for guiding quality improvement efforts.
Defining the Seven Dimensions of Quality for Supportive Housing

Through communication with supportive housing tenants, providers, funders, and other stakeholders - and through involvement in successful supportive housing projects around the country - CSH has identified the following Seven Dimensions of Quality for supportive housing.

**Dimension #1: Administration, Management, and Coordination**
All involved organizations follow standard and required administrative and management practices, and coordinate their activities in order to ensure the best outcomes for tenants.

**Dimension #2: Physical Environment**
The design, construction, appearance, physical integrity, and maintenance of the housing units provide an environment that is attractive, sustainable, functional, appropriate for the surrounding community, and conducive to tenants’ stability.

**Dimension #3: Access to Housing and Services**
Initial and continued access to the housing opportunities and supportive services is not restricted by unnecessary criteria, rules, services requirements, or other barriers.

**Dimension #4: Supportive Services Design and Delivery**
The design and delivery of supportive services facilitate access to a comprehensive array of services, are tenant-focused, effectively address tenants’ needs, and foster tenants’ housing stability and independence.

**Dimension #5: Property Management and Asset Management**
Property management activities support the mission and goals of the housing and foster tenants’ housing stability and independence, and appropriate asset management strategies sustain the physical and financial viability of the housing asset.

**Dimension #6: Tenant Rights, Input, and Leadership**
Tenant rights are protected within consistently-enforced policies and procedures, tenants are provided with meaningful input and leadership opportunities, and staff - tenant relationships are characterized by respect and trust.

**Dimension #7: Data, Documentation, and Evaluation**
All involved organizations reliably capture accurate and meaningful data regarding the effectiveness, efficiency, and outcomes of their activities, and use this data to facilitate, and improve, the performance of those activities on an ongoing basis.
Implementing this Assessment

Overview
In high-quality supportive housing, all involved organizations follow standard and required administrative and management practices, and coordinate their activities in order to ensure the best outcomes for tenants. This Assessment Tool is intended to help organizations to ensure that the policies, procedures, and ongoing practices provide a solid foundation for the operation of high-quality supportive housing, and to guide efforts to assess and improve the quality of the coordination among all involved organizations.

Materials Needed to Complete this Assessment:
Completion of this section may require reviewing information from a number of sources.

Organizational Documents and Manuals:
- Memorandum of Understanding with partners
- Property Management Operations Manual
- Asset Management Plan
- Services Policy and Procedure Manual
- Compliance Manual
- Safety and Emergency Plans
- Staff Training and Orientation Manual
- Personnel Policies and Procedures Manual
- Staff Development Plans and Records
- Job Descriptions
- Meeting Minutes and/or Meeting Calendar
- Results of Administrative and Financial Reviews, Audits, and Inspections
- Reports to Funders

Policies and Procedures Regarding:
- Hiring and Training of Tenants
- Decision-making Responsibilities
- Coordination of Partners
- Communication with Partners

Additional Sources of Information:
- Interviews with Key Staff
- Billing Records
- Tenant Records
- Documentation of Input from Stakeholders (e.g. Focus Group Results, Survey Results)
- Fair Housing Laws
- Landlord / Tenant Laws
- Americans with Disabilities Act
- Section 504 of the Rehabilitation Act (if federally funded)
- HIPAA regulations and other laws pertaining to confidentiality and security of tenant information
- Medicaid/Medicare Requirements
- LIHTC Compliance Standards
- HUD Compliance Standards
- Funder Requirements
- Other Applicable Local, State, and Federal Laws, Regulations, and Standards.

Assessment Rating Scale
The following scale should be used in performing this assessment:
A - No Improvement Needed
B - Minimal Improvement Needed
C - Improvement Needed
D - Significant Improvement Needed
Assessing Key Indicators of Quality

1. The operation of the supportive housing units is managed through an effective partnership among representatives of the project owner and/or sponsor, the property management agent, the supportive services providers, relevant public agencies, and tenants. (Note: Involvement of a property management representative within the partnership may not be appropriate for tenant-based supportive housing initiatives, within which the landlord may not be aware of a tenant’s service needs or participation in services programming.)

   **Questions to Consider:** Is the partnership between the above stakeholders working effectively? Are the relevant partners included in making decisions regarding operations issues?

   A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed

2. Roles and responsibilities for all organizations and staff involved in the operation of the supportive housing units are specified in a Memorandum of Understanding.

   **Questions to Consider:** Is the Memorandum of Understanding up to date? Do partners and staff have questions regarding their roles and responsibilities that could be clarified in the Memorandum of Understanding?

   A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed

3. All involved organizations comply with all applicable local, state and federal laws, regulations, and standards.

   **Questions to Consider:** Do involved organizations understand the laws, regulations, and standards that apply to their work? What have been the results of recent audits or reviews? What mechanisms are in place to ensure compliance? Do involved organizations have access to reliable sources of information if they have questions regarding compliance?

   A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Key Indicators of Quality (continued)

4. All involved organizations maintain, review and regularly update manuals and plans, such as: Property Management Operations Manual; Asset Management Plan; Maintenance Policies and Procedures Manual; Services Policy and Procedure Manual; Compliance Manual; Personnel Policies and Procedures Manual; Staff Training and Orientation Manual; and Safety and Emergency plans.

Questions to Consider: Is there a schedule for reviewing and updating manuals and plans? Who conducts the reviews? How are decisions made regarding potential changes to manuals or plans? How are updates disseminated?

5. A collaborative relationship between supportive services and property management staff results in effective, coordinated strategies to foster tenants' housing stability and independence, to prevent tenant evictions and to address issues resulting from substance use, relapse, and mental health crises. (Note: The coordination of supportive services with property management activities may not be appropriate for tenant-based supportive housing initiatives.)

Questions to Consider: How do property management and supportive services staff coordinate their efforts when tenant issues arise that may impact housing stability? Do supportive services staff and property management staff have a clear understanding of the strategies they can each use to foster housing stability?
Assessing Additional Indicators of Quality
Policies, Procedures, and Management Practices

1. All involved organizations maintain clear, thoroughly-defined job descriptions that reflect current responsibilities for their staff positions.

   A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed

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2. Clear policies and procedures address the hiring and training of tenants as paid staff and/or volunteers to ensure that roles and lines of authority are clear and that confidentiality and appropriate boundaries are maintained.

   A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed

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3. All involved organizations have effective mechanisms for front-line staff to communicate with supervisors and administrators, in order to facilitate informed decision-making.

   A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed

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4. All involved organizations monitor their staff turnover and take actions to reduce staff turnover, including providing clear career pathways for qualified staff, whenever possible.

   A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed

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A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Policies, Procedures, and Management Practices (continued)

5. When new supportive housing units are developed, input is sought from principal stakeholders (such as neighbors, property management staff, supportive services staff, and tenant representatives) regarding the design, development, and operations plans.

6. All involved organizations proactively seek to establish and maintain strong relationships with stakeholders from the local community.

7. A written Incident Review Policy explicitly involves staff and tenants (as appropriate) in the review of crises, emergencies, and other incidents, leading to the development of plans for corrective actions and follow-up.

8. Written policies and procedures describe protocols for addressing and reporting child abuse and neglect, elder abuse and neglect, sexual abuse, domestic violence, and other forms of abuse, and staff are trained on the policies and procedures.

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Financial Management and Compliance

1. Each involved organization regularly passes all administrative reviews, audits, and inspections.

   Notes >>

   A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed

2. The billing records, documentation, and reporting practices of each organization comply with all funders' requirements.

   Notes >>

   A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed

3. Each organization has an annual financial audit that includes no significant findings completed within approximately 120 days of the end of their Fiscal Year.

   Notes >>

   A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed

4. Each organization carries adequate insurance coverage for all activities and assets for which their organization is responsible.

   Notes >>

   A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Coordination of Roles

1. The Memorandum of Understanding delineating the roles and responsibilities for all involved organizations and staff is reviewed and updated at least annually, in order to ensure its currency and accuracy.

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2. Staff within all involved organizations have appropriate and clearly-defined roles and decision-making responsibilities within the management structure and in the operations of the supportive housing units.

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3. Property management and supportive services staff have separate and distinct responsibilities, staff roles are clearly defined, and each staff person’s job responsibilities are located solely within one role, rather than split between functions, even in situations in which both property management and supportive services functions are provided by the same organization.

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A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Coordination of Roles (continued)

4. There are regularly scheduled forums for staff within all involved organizations to discuss: their roles and the coordination of their efforts, tenant health and safety issues, tenants who are in rent arrears or are otherwise at risk of losing their housing, and gaps in management and operations.

5. Decisions and clear action steps, including assignment of responsibilities for each action step, are documented at the end of forums and meetings among staff.

6. There are effective methods and opportunities for communication among staff from involved organizations during the time periods between scheduled meetings.

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Staff Development and Training

In order to help ensure the achievement of quality, staff members involved in performing property management and asset management activities should receive initial and ongoing training relevant to their specific roles and responsibilities, including:

1. New staff within all involved organizations receive orientations regarding the mission, philosophy and goals of the supportive housing program; and the Memorandum of Understanding among the organizations.

2. Staff within all involved organizations receive orientations and cross-training to facilitate understanding of each others’ organizations and responsibilities.

3. All staff members are trained annually on relevant safety policies and procedures, including: Universal Precautions; basic first-aid procedures; the use of safety equipment; emergency evacuation routes; and crisis prevention, de-escalation, and management techniques.

4. Staff within involved organizations receive training in the following areas, as relevant to their roles and responsibilities:
   o The services needs of special population(s) served in the supportive housing.
   o Applicable local, state, federal laws, regulations and standards.
   o Completion of records, documentation and reports in compliance with funders’ requirements
   o Confidentiality and the security of tenant information, including what may and may not be shared with other staff, depending on their roles.

Notes >>

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Other Notes

Notes >>

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Implementing this Assessment

Overview
In high-quality supportive housing, the design, construction, appearance, physical integrity, and maintenance of the housing units provide an environment that is attractive, sustainable, functional, appropriate for the surrounding community, and conducive to tenants' stability. This Assessment Tool is intended to help organizations to ensure that appropriate choices are made regarding the design and construction of the housing, to assess the physical environment with regards to safety and security, tenant independence, and compliance with applicable regulations, and to ensure that the ongoing maintenance and replacement activities help to sustain the quality of the housing.

Materials Needed to Complete this Assessment:
Completion of this section may require reviewing information from a number of sources.

Organizational Documents and Manuals:
- Property Management Operations Manual
- Asset Management Plan
- Safety and Emergency Plans
- Inspection Schedule and Results
- Master Lease Agreements

Policies and Procedures Regarding:
- Inspection Activities
- Pest Control
- Maintenance Activities
- Replacement Activities
- Safety and Security
- Tenants' Furnishings and Storage

Additional Sources of Information:
- Interviews with Key Staff
- Interviews with Tenants
- Tenant Satisfaction Surveys
- Zoning Laws
- Public Health and Safety codes
- HUD’s Housing Quality Standards (HQS)
- Universal Design Standards and Visitability Standards
- Fire Safety Codes
- Funders’ Requirements
- Americans with Disabilities Act
- Section 504 of the Rehabilitation Act

Assessment Rating Scale
The following scale should be used in performing this assessment:
A - No Improvement Needed
B - Minimal Improvement Needed
C - Improvement Needed
D - Significant Improvement Needed
Assessing Key Indicators of Quality

1. The housing has a home-like, residential appearance on both the interior and exterior, and its scale, appearance, design, and quality are consistent with the neighborhood and reflect (or exceed) local community standards.

   Questions to Consider: Does the housing fit in well with – or improve – the appearance of the surrounding neighborhood? Is the environment one that tenants will be proud to invite their families and friends to visit?

   Options: A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed

2. The housing units provide adequate living space for essential daily activities (such as cooking, eating, sleeping, and studying), include an adequate number of bedrooms for the households’ compositions, and sharing of bedrooms by non-related single adult tenants is not required.

   Questions to Consider: Are there daily activities that tenants must leave the unit to complete? What is the policy regarding sharing of bedrooms?

   Options: A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed

3. When feasible, each unit has a private bathroom and kitchen; when not feasible, the sharing of bathrooms and kitchens is minimized as much as possible.

   Questions to Consider: If there are shared bathrooms and kitchens, what arrangements have been made to ensure that tenants have adequate access to those facilities?

   Options: A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Key Indicators of Quality (continued)

4. The housing includes appropriate security features, which might include buzzers on doors, a limited number of entrances, security cameras, adequate interior and exterior lighting, and a secure front desk, to ensure the safety of tenants.

Questions to Consider: Are existing security features achieving their intended purposes? Are there additional security features that would enhance the safety of the tenants, staff and the housing itself?

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed

Notes >>

5. The housing complies with requirements of the Americans with Disabilities Act and with Section 504 of the Rehabilitation Act (if federally-funded), and incorporates Universal Design Standards and Visitability Standards, whenever possible, in order to meet the needs of current and future tenants and their guests.

Questions to Consider: Are staff familiar with the ADA, Universal Design and Visitability standards? Are there modifications that could be made to enhance the accessibility of the housing for tenants or visitors?

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed

Notes >>
Assessing Additional Indicators of Quality

Appropriateness of the Housing Units

1. The design of the housing units reflects tenants’ need for independence, privacy, safety, and security, with features and amenities including: individual temperature, ventilation, and lighting controls; adequate storage spaces for personal belongings and for food items; stovetops and ovens; design features that reduce external noise audible within the units; smoke detectors and fire suppression equipment; and a working telephone line and/or intercom system.

Notes >>

2. The unit sizes comply with zoning requirements and are appropriate for the tenants’ household composition.

Notes >>

3. If units are furnished, furniture is clean and in good repair.

Notes >>

4. Tenants are permitted to use their own furniture within their unit when doing so will not create safety or health risks, such as pest infestation or overcrowding of the unit.

Notes >>

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Building Design and Appearance

1. The exterior of the building and the grounds are clean and well maintained.

   Notes >>

   A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed

2. The housing utilizes durable materials that have been chosen to reduce future maintenance costs and to help ensure physical and financial sustainability.

   Notes >>

3. The housing incorporates appropriate and feasible green design practices, such as the use of energy-efficient and water-conserving fixtures and products, in order to increase efficiency and sustainability, reduce utility costs, and improve indoor air quality.

   Notes >>

Spaces for Staff Use and Services Provision

1. Adequate space is provided for supportive services activities, including staff offices, private meeting rooms, and community rooms for tenant meetings and community-building activities.

   Notes >>

   A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
### Assessing Additional Indicators of Quality (continued)

#### Spaces for Staff Use and Services Provision (continued)

2. Spaces used by staff for the delivery of supportive services and/or for staff to meet with tenants, are clean, comfortable, and well-maintained.

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3. Property management staff and supportive services staff do not share office space with each other.

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4. Supportive services records and files and property management records and files are kept in separate and secured storage.

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5. Areas of the housing that are available for use only by staff are clearly defined and do not interfere with the home-like atmosphere.

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A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Common Rooms and Public Spaces

1. Common rooms and public spaces, including lobbies, sitting areas, meeting rooms, mail rooms, laundry rooms, and trash collection areas, are easily accessible to all tenants.

2. Common spaces, such as community rooms, are able to accommodate a variety of activities that provide meaningful opportunities for tenant and staff interaction, ranging from structured supportive services activities to opportunities for socialization and community-building.

3. Public spaces, such as lobbies and sitting areas, are comfortable and provide opportunities for tenants to interact with each other and with staff.

4. All common rooms and public spaces, including any shared furnishings, are clean and in good repair.

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Common Rooms and Public Spaces (continued)

5. Areas where smoking is and is not permitted are clearly defined.

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Maintenance and Inspection Activities

1. Staff adhere to a comprehensive, written plan and schedule for inspections, pest control, routine maintenance, and replacement activities designed to sustain the quality of the physical environment.

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2. Inspections are conducted on each unit at least annually.

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3. Inspections document that units meet or exceed the U.S. Department of Housing and Urban Development’s Housing Quality Standards (HQS).

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A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Maintenance and Inspection Activities (continued)

4. Inspection results that require follow-up or corrective actions are addressed within reasonable timeframes.

5. There is a clear policy and procedure addressing the creation of work orders and the timeframes for completing them.

6. Policies and procedures ensure that the project remains in compliance with: all applicable fire safety codes, including regular fire and evacuation drills; all applicable public health codes; and all other applicable safety codes.

7. The supplies and equipment needed to maintain a safe environment (including those needed for adhering to Universal Precautions, first aid supplies, fire extinguishers, and smoke detectors) are regularly inspected, inventoried, re-stocked, and repaired.

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Maintenance and Inspection Activities (continued)

8. Non-toxic, environmentally-friendly products are used for cleaning, extermination, and landscaping activities.

\[ \text{Notes >>} \]

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Staff Development and Training

In order to help ensure the achievement of quality under this Dimension, staff members involved should receive initial and ongoing training relevant to their specific roles and responsibilities, including:

1. The Americans with Disabilities Act and Section 504 of the Rehabilitation Act (if federally-funded), including issues related to the physical accessibility of the housing.

2. Written plans and schedules for inspections, pest control, routine maintenance activities, and replacement activities.

3. U.S. Department of Housing and Urban Development’s Housing Quality Standards

4. Policies and procedures designed to ensure compliance with applicable fire safety codes (including fire and evacuation drills) and public health and safety codes.

5. Other safety policies and procedures, including Universal Precautions, basic first-aid procedures, the use of safety equipment, and emergency evacuation routes.

6. Universal Design Standards and Visitability Standards.

7. Green design and maintenance practices, such as energy efficiency, water conservation, and environmentally friendly cleaning and maintenance practices.

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A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Staff Development and Training (continued)

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A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessment of Dimension of Quality #3: Access to Housing and Services

Implementing this Assessment

Overview
In high-quality supportive housing, initial and continued access to the housing opportunities and supportive services is not restricted by unnecessary criteria, rules, services requirements, or other barriers. This Assessment Tool is intended to help organizations to identify ways to increase access to housing and supportive services, for people who are homeless or at risk of homelessness, and who have multiple barriers to employment and housing stability, such as mental illness, chemical dependency and/or other disabling or chronic health conditions. This Tool provides an overview of the practices that are utilized by organizations that wish to maximize accessibility in every aspect of their supportive housing.

Materials Needed to Complete this Section:
Completion of this section may require reviewing information from a number of sources.

Organizational Documents and Manuals:
- Housing Application Forms
- Tenant Lease Agreement
- Tenant Selection Plan
- Tenant Education Materials (e.g., Orientation Materials or Tenant Handbook)
- Materials Provided to Referral Sources
- MOU with Partners
- House Rules
- Supportive Services Plan
- Fee for Service Schedules
- Rent Adjustment Schedules
- Staff Development Plans and Records

Policies and Procedures Regarding:
- Application Processing
- Screening and Tenant Selection Process
- Eligibility and Screening Criteria
- Admission Criteria for Services Programs
- Intakes and Orientations
- Waiting List Management
- Referrals for Tenants
- Rent and Rent Adjustments
- Fees for Services
- Reasonable Accommodations
- Staff Development
- Rent Repayment Plans
- Property Damage by Tenants
- Diversity and/or Cultural Competence

Additional Sources of Information:
- Interviews with Key staff
- Interviews with Tenants
- Tenant Satisfaction Survey Results
- Landlord - Tenant Laws
- Section 504 of the Rehabilitation Act (if federally funded)
- Americans with Disabilities Act
- Fair Housing Laws
- Universal Design and Visitability Standards
- Tenant Records
- Funders' Requirements

Assessment Rating Scale
The following scale should be used in performing this assessment:
A - No Improvement Needed
B - Minimal Improvement Needed
C - Improvement Needed
D - Significant Improvement Needed
Assessing Key Indicators of Quality

1. The housing is available to and intended for a person who is, or a family whose head of household is, homeless or at-risk of homelessness, and has multiple barriers to housing stability and employment, which might include mental illness, chemical dependency, and/or other disabling or chronic health conditions.

Questions to Consider: Do eligibility criteria indicate that tenants with barriers to housing stability are prioritized for supportive housing units? Does the tenant selection plan describe a target population consistent with this Indicator and describe how housing will be made available to the target population?

Notes >>

2. The eligibility screening process does not include “housing readiness” criteria and reflects a commitment to housing tenants with no current income, histories of homelessness, histories of criminal justice involvement, prior housing failures, poor credit histories, disabilities, past or current substance abuse and/or other obstacles to accessing or maintaining housing.

Questions to Consider: What persons are ineligible for the supportive housing? Are limits on eligibility the result of external requirements, organizational capacity, or other factors? Are there actions to take that might ameliorate such conditions?

Notes >>

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Key Indicators of Quality (continued)

3. There is no discrimination on the basis of race, color, gender, sexual orientation, disability, religion, or national origin in the provision of housing or services to applicants or tenants.

Questions to Consider: Do tenants and staff express satisfaction with the organizations’ diversity practices? Are Fair Housing practices consistently enforced? Are policies and procedures in alignment with this Indicator?

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed

4. Services are voluntary, such that tenants may choose whether or not to participate in services without impacting their eligibility to remain in the housing.

Questions to Consider: Are there any requirements that tenants meet with staff on a regular basis? Are there any services that are all tenants are required to participate in? Is participation in services linked to maintaining housing in other ways?

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed

5. The tenant household ideally pays no more than 30% of household income toward rent and utilities, and never pays more than 50% of income toward such housing expenses.

Questions to Consider: Is the cost of tenant rent and utilities less than, or between, 30% and 50% of tenant income? What supports are in place to assist tenants to be able to afford their rent and utilities costs?

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality

Removing Barriers to Access to Housing

1. Assertive outreach and in-reach methods are used to engage people living on the streets, in emergency shelters, or in jails or prisons, in order to facilitate their access to the housing opportunities.

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2. When possible, intake and screening processes prioritize and facilitate access to housing opportunities (for example, providing flexible timelines for entry to housing), for persons who are “frequent users” of multiple public systems, living on the streets, living in emergency shelters, and/or in jails or prisons.

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3. Staff proactively educate and coordinate with the organizations and individuals who serve as referral sources, regarding eligibility requirements for the housing and the housing application process.

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4. Application processes, documentation of eligibility, and intake processes are as streamlined and efficient as feasible and, to the extent possible, all involved organizations use unified application processes and/or share information appropriately so that applicants are not asked for the same information on multiple occasions.

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Assessing Additional Indicators of Quality (continued)

Removing Barriers to Access to Housing (continued)

5. Application processes, housing eligibility criteria, services eligibility criteria, screening processes, reasonable accommodation processes, and rent and rent adjustment policies are clearly defined in writing and are regularly communicated to applicants, tenants, staff, service partners, and referring agencies.

6. The housing application and screening processes are fully accessible to persons with disabilities and appropriate reasonable accommodations and necessary supports are provided as needed, during the application and screening process.

7. Staff responsible for managing waiting lists and implementing tenant screening and selection processes understand the eligibility criteria, the screening processes, and the relevant policies.

8. Applications are processed accurately and in a timely manner and vacant units are made available to new tenants as quickly as possible, in order to reduce wait times for housing.
Assessing Additional Indicators of Quality (continued)

Removing Barriers to Access to Housing (continued)

9. Concerted efforts are implemented to contact applicants prior to removing them from waiting lists.

   - A - No Improvement Needed
   - B - Minimal Improvement Needed
   - C - Improvement Needed
   - D - Significant Improvement Needed

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10. There is a clearly defined process and time frame for informing applicants of approval or denial of application for housing.

   - A - No Improvement Needed
   - B - Minimal Improvement Needed
   - C - Improvement Needed
   - D - Significant Improvement Needed

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11. When possible, eligible applicants are given a choice of housing units.

   - A - No Improvement Needed
   - B - Minimal Improvement Needed
   - C - Improvement Needed
   - D - Significant Improvement Needed

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12. All involved organizations demonstrate compliance with applicable laws, regulations, and standards, including Fair Housing laws, Landlord - Tenant laws, the Americans with Disabilities Act, Section 504 of the Rehabilitation Act (if federally-funded), and funder requirements.

   - A - No Improvement Needed
   - B - Minimal Improvement Needed
   - C - Improvement Needed
   - D - Significant Improvement Needed

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Assessing Additional Indicators of Quality (continued)

Removing Barriers to Access to Housing (continued)

13. Staff are knowledgeable about the criminal justice system and any additional regulations or requirements related to providing housing opportunities for persons leaving criminal justice settings.

\[\text{\textbullet\ A\ 	extbullet\ B\ 	extbullet\ C\ 	extbullet\ D}\]

Removing Barriers to Access to Supportive Services

1. Services staff demonstrate consistent and ongoing efforts to reach out to, and engage, all tenants into the available services.

\[\text{\textbullet\ A\ 	extbullet\ B\ 	extbullet\ C\ 	extbullet\ D}\]

2. Services staff meet with new tenants within 2 days of move-in (and whenever possible, prior to move-in) to review the available supportive services options with tenants and then review available supportive services options with tenants regularly throughout their tenancy.

\[\text{\textbullet\ A\ 	extbullet\ B\ 	extbullet\ C\ 	extbullet\ D}\]

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Removing Barriers to Access to Supportive Services (continued)

3. Supportive services are provided on-site, in tenants' homes, and/or in locations that are easily accessible to tenants by a short walk or by public transportation.

4. All programs and spaces used for the delivery of services are fully accessible to persons with disabilities and appropriate reasonable accommodations are provided to tenants with disabilities to facilitate their participation in services.

5. Supportive services staff and programs are available during hours that ensure maximum access and utilization by tenants, including tenants who may be working or engaged in other activities during regular business hours.

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Removing Barriers to Access to Supportive Services (continued)

6. Crisis services are available to tenants 24 hours a day, 7 days a week.

7. Whenever possible, tenants are provided with and/or referred to community-based services available at no cost to tenants; any fees charged for services are based on sliding fee scales and are affordable to tenants.

8. Services staff support tenants in keeping appointments with their various services providers, for example, by giving tenants reminders of appointments.

9. Staff ensure that interested tenants have access to appropriate supportive services after moving out of the supportive housing unit.

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Access to Community Resources

1. Housing units are located within safe neighborhoods that are acceptable to tenants and that feature close proximity to opportunities for employment, services, shopping, recreation, and socialization.

   A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed

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2. The housing units' location provides easy access to public transportation available with reasonable frequency, or alternate transportation options are provided to tenants.

   A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed

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Cultural Competency

1. Efforts to ensure cultural competency are ongoing and comprehensive.

   A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed

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2. Efforts to ensure cultural competency impact organizational practices and decision-making regarding: development and review of policies and written materials; hiring practices; initial and ongoing training of staff; content of individual and group supervision sessions; gathering of input from stakeholders; and design of supportive services programming.

   A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed

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A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Cultural Competency (continued)

3. Multi-lingual staff, translated materials, and/or interpretation and translation services are available to tenants, as needed.

4. All materials for tenants are written at an appropriate literacy level and staff assist tenants in understanding the content of written materials, when necessary.

5. Housing common areas and spaces designated for supportive services delivery are decorated in a culturally sensitive manner.

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A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Staff Development and Training

1. In order to help ensure the achievement of quality, staff members involved in performing property management and asset management activities should receive initial and ongoing training relevant to their specific roles and responsibilities, including:

   o Philosophy and goals of the supportive housing.

   o Outreach and engagement strategies, Motivational Interviewing, and the Stages of Change.

   o Policies and procedures pertaining to: housing eligibility criteria; services eligibility criteria; screening and selection; applications for housing, rent and rent adjustments; waiting list management; reasonable accommodations; notification of approval or denial of application for housing; tenant rights and grievances.

   o Fair Housing Laws, Landlord - Tenant Laws, Americans with Disabilities Act, Section 504 of the Rehabilitation Act (if federally-funded) and reasonable accommodations, and funder requirements that have implications for tenants’ initial eligibility for housing and services, or for tenants’ ongoing participation in housing and services.

   o The criminal justice system, and the regulations and requirements related to providing housing for ex-offenders.

   o The services needs of the population(s) served in the supportive housing and making effective referrals to supportive services to address those needs.

   o Cultural competency topics, which might include issues related to experiences of homelessness and/or experiences within correctional settings and other institutional settings.

Notes >>

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Staff Development and Training (continued)

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A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessment of Dimension of Quality #4: Supportive Services Design and Delivery

Implementing this Assessment

Overview
In high-quality supportive housing, the design and delivery of supportive services facilitate access to a comprehensive array of services, are tenant-focused, effectively address tenants’ needs, and foster tenants’ housing stability and independence. This Assessment Tool is intended to assist organizations to assess the design and delivery of the supportive services, in order to identify strategies for strengthening those services and for improving tenant and program outcomes.

Materials Needed to Complete this Section:
Completion of this section may require reviewing information from a number of sources.

Organizational Documents and Manuals:
- Service Plan
- Services Policy and Procedures Manual
- Compliance Manuals
- Safety and Emergency Plans
- Tenant Education Materials
- Records of Staff Supervision
- Program Requirements for Tenants
- Job Descriptions
- Staff Development Plans and Records
- Staff Orientation and Training Manual
- Staff Meeting Minutes and/or Calendars

Policies and Procedures Regarding:
- Staff Training and Development
- Making Referrals for Tenants
- Tenant Orientation
- Crisis Prevention and Management
- Individualized Services Planning
- Completion of Needs Assessments
- Documentation of Services
- Provision of Supervision

Additional Sources of Information:
- Interviews with Key Staff
- Interviews with Tenants
- Americans with Disabilities Act
- Funder Requirements
- Guidelines or Standards from Professional Associations or Accrediting Bodies
- Tenant Satisfaction Surveys
- Tenant Services Records

Assessment Rating Scale:
The following scale should be used in implementing this assessment:
A – No Improvement Needed
B – Minimal Improvement Needed
C – Some Improvement Needed
D – Significant Improvement Needed
Assessing Key Indicators of Quality

1. All members of tenant households have easy, facilitated access to a flexible and comprehensive array of supportive services designed to assist the tenants to achieve and sustain housing stability and independence.

   **Questions to Consider:** How is tenant access to services facilitated? Are the same services provided to all tenants or are services plans individualized? What outcomes do the services focus on helping tenants to achieve?

   A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed

2. Supportive services available to tenants include, but are not limited to: case management services; medical services; mental health services; substance abuse treatment services; vocational and employment services; money management services; life skills training; and advocacy.

   **Questions to Consider:** Are each of these services either provided directly or through a well-established referral system? Are the services options tailored to the needs of the tenant population? Are there mechanisms in place for linking tenants to services outside of the options usually offered, if the need arises?

   A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed

3. The supportive services philosophy and design promotes and supports: housing stability; independence; community building and the development of support networks; and participation in meaningful activities, including employment, within the broader community.

   **Questions to Consider:** How are new staff oriented to the program’s service philosophy and design? If the services program has other goals, are they compatible with the areas of focus, listed above?

   A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Key Indicators of Quality (continued)

4. Supportive services staff use a variety of proactive and creative strategies to engage tenants in on-site and/or community-based supportive services, but participation in such services is not a condition of ongoing tenancy.

Questions to Consider: Do staff receive training and/or supervision related to the use of engagement strategies? Do the engagement strategies used vary for different tenants? Are there requirements that tenants participate in particular services or meet with services staff?

5. Supportive services and property management strategies include effective, coordinated approaches for addressing tenant issues resulting from substance use, relapse, and mental health crises, and focus on fostering housing stability. (Note: The coordination of supportive services with property management activities may not be appropriate for some tenant-based supportive housing initiatives, within which the landlord may not be aware of a tenant’s service needs or participation in services programming.)

Questions to Consider: Do services and property management staff each understand their role in addressing such issues? How do services and property management staff coordinate their efforts? Are services staff and property management staff in agreement regarding the goals of the supportive housing project?
Assessing Additional Indicators of Quality

Supportive Services Design

1. Services staff are available to provide more frequent and intensive services at the beginning of a tenant’s residency, in order to facilitate the tenant’s stable transition into permanent housing, and services are not time-limited.

   A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed

2. Clear referral protocols, positive relationships and open channels of communication are established by services staff with outside organizations who serve the project’s tenants, and information regarding how to link tenants to outside organizations is kept current and available to staff.

3. Persons who have both mental illnesses and addictions to alcohol and/or drugs have access to integrated treatment services, whenever feasible.

4. The design of the services programming includes comprehensive crisis prevention strategies, policies and procedures that address threatening or disruptive behavior and crisis situations and procedures for debriefing and providing post-crisis counseling, for staff and tenants.

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Supportive Services Design (continued)

5. A comprehensive written services plan describes:
   - The services philosophy;
   - The target population(s) and their anticipated service needs;
   - A description of any formal relationships with any other services providers or community partners;
   - The services to be made available, identifying whether the services are to be provided directly or through referral linkages, by whom, in what location, and during what days and hours;
   - Plans for the provision of crisis services, including emergency mental health and medical services, which are available 24 hours a day, 7 days a week;
   - The availability of peer-support groups and/or peer-delivered services, if any;
   - The use of evidence-based practices or other strategies to ensure that services can be expected to meet the needs of the targeted tenancy;
   - The goals and anticipated outcomes of each service to be offered; and
   - A plan for ensuring that there is adequate site coverage to maintain appropriate staff / tenant ratios and hours of availability, for each service that is consistent with the provision of quality services, manageable caseloads and maximum availability of services to all tenants.

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6. Persons who have both mental illnesses and addictions to alcohol and/or drugs have access to integrated treatment services, whenever feasible.

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A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Supportive Services Design (continued)

7. Service design includes comprehensive crisis prevention strategies, policies and procedures that address threatening or disruptive behavior and crisis situations and procedures for debriefing and providing post-crisis counseling, for staff and tenants.

Supportive Services Delivery

1. The completion of service needs assessments: is consistent with professional standards; focuses on identifying tenants' goals and strengths; and focuses on identifying tenants' service needs and preferences.

2. Staff actively involve tenants in the design, development, and implementation of their individualized service plans and work with tenants to develop goals that are realistic, achievable, measurable, and tailored to the tenants' preferences.

3. In the development of individualized service plans, staff emphasize providing tenants with a variety of options for accessing appropriate and effective supportive services.
Assessing Additional Indicators of Quality (continued)

Supportive Services Delivery (continued)

4. Service needs assessments and documentation of services are regularly updated to reflect tenants’ changing service needs and goals, and individualized service plans are regularly adapted to reflect tenants’ changing service needs and goals.

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed

5. Staff assist all tenants to identify and use their strengths to achieve their personal goals.

6. Staff encourage all tenants to participate in meaningful activities, and assist all tenants who express a desire to work to obtain appropriate vocational services, employment services, and employment.

7. Staff encourage the maximum independence of tenants and support interested tenants in developing the life skills and abilities needed to access, and succeed within, housing settings in the private market.

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
### Assessing Additional Indicators of Quality (continued)

#### Supportive Services Delivery (continued)

8. Staff assist tenants to access public benefits for which they are eligible.

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9. Staff assist tenants to anticipate, prevent, and manage the negative consequences of substance use or relapse.

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10. Job descriptions for services staff and supervisors include relevant background and work requirements appropriate for the populations being served and consistent with professional standards and norms.

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11. In order to ensure quality service provision, staff receive regular supervision and support from qualified supervisors.

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A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Supportive Services Delivery (continued)

12. Services delivery is culturally competent.

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed

Coordination with Property Management

Note: The coordination of supportive services with property management activities may not be appropriate for tenant-based supportive housing initiatives, within which the landlord may not be aware of a tenant’s service needs or participation in services programming.

1. Services staff and property management staff coordinate their efforts to help prevent evictions, and to ensure tenants facing eviction have access to necessary services and supports.

2. Supportive services staff receive cross-training to facilitate understanding of property management staff responsibilities.

3. Regularly scheduled forums are held at least monthly (and preferably more frequently) for supportive services and property management staff to discuss their roles, the coordination of their efforts, any current issues, and to address gaps in services and operations.
Assessing Additional Indicators of Quality (continued)

Coordination with Property Management (continued)

4. Supportive services staff proactively address issues that may impact tenants’ housing stability, and are responsive to issues raised by property management staff.

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5. Supportive services staff work with property management staff to support the development of rent repayment plans for tenant in rent arrears.

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6. Supportive services staff advocate on tenants’ behalf with property management staff, when necessary and appropriate, to maintain tenants’ housing stability.

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7. Supportive services staff promptly notify property management staff when they observe safety or maintenance concerns.

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A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality

(continued)

Staff Development and Training

In order to help ensure the achievement of quality, staff members involved in performing property management and asset management activities should receive initial and ongoing training relevant to their specific roles and responsibilities, including:

1. The mission, philosophy and goals of the supportive housing program; and the Memorandum of Understanding among the organizations.
2. Cross-training to facilitate understanding of property management staff responsibilities.
3. The services needs of the population(s) served in the supportive housing and making effective referrals to supportive services to address those needs.
4. Outreach and engagement strategies, Motivational Interviewing, and the Stages of Change.
5. Evidence-based best practices and services strategies appropriate for the population(s) served.
6. Trauma-informed services provision.
7. Crisis prevention, de-escalation and management.
8. Fair Housing Laws, Landlord - Tenant Laws, Americans with Disabilities Act, Section 504 of the Rehabilitation Act (if federally-funded) and reasonable accommodations, and funder requirements that have implications for tenants’ initial eligibility for housing and services, or for tenants’ ongoing participation in housing and services.
10. Specific policies and procedures including: Incident Review; Reporting Abuse and Neglect; and Referral Procedures.
11. Cultural competency topics, which might include issues related to experiences of homelessness and/or experiences within correctional settings and other institutional settings.
12. Completion of records, documentation and reports in compliance with funders’ requirements.
13. Confidentiality and the security of tenant information, including what may and may not be shared with other staff, depending on their roles.

Notes >>

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Staff Development and Training (continued)

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Other Notes

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A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessment of Dimension of Quality #5:
Property Management and Asset Management

Implementing this Assessment

Overview
In high-quality supportive housing, property management activities foster tenants’ independence and housing stability, and appropriate asset management strategies sustain the physical and financial viability of the housing asset. In supportive housing settings, property managers perform all of the usual activities as in other housing – screening tenants, leasing units, maintaining the property, and managing day to day operations – but with an increased focus and emphasis on supporting the tenants in successfully maintaining their housing. This Assessment Tool is intended to help organizations to identify ways to perform property management and asset management activities that meet industry standards, while successfully addressing the unique issues and challenges of supportive housing.

Materials Needed to Complete this Assessment
Completion of this section may require reviewing information from a number of sources.

Organizational Documents and Manuals:
- Property Management Operations Manual
- Maintenance Policies and Procedures
- Compliance Manuals
- Safety and Emergency Plans
- Tenant Selection Plan
- Materials Provided to Referral Sources
- Housing Application
- Tenant Lease Agreement

Asset Management Plan
- Tenant Education Materials
- Staff Development Plans and Records
- Property Management Staffing Plan
- Personnel Policies and Procedures Manual
- Staff Meeting Minutes and/or Calendar
- Job Descriptions
- Financing Plan and Financial Records

Policies and Procedures Regarding:
- Making Referrals for Tenants
- Rent Repayment Plans
- Staff Training and Developments
- Tenant Move-In and Orientation
- Fair Housing
- Eligibility and Screening Processes
- Crisis Prevention and Management
- Incident Review
- Reporting Abuse and Neglect
- Property Damage by Tenants
- Financial Management and Monitoring

Additional Sources of Information:
- Interviews with Key Staff
- Interviews with Tenants
- Tenant Satisfaction Surveys
- Tenant Records
- Funders’ Requirements
- Americans with Disabilities Act
- Fair Housing Laws
- Landlord-Tenant Laws
- Section 504 of Rehabilitation Act (if federally funded)

Assessment Rating Scale
The following scale should be used in performing this assessment:
A - No Improvement Needed
B - Minimal Improvement Needed
C - Improvement Needed
D - Significant Improvement Needed
Assessing Key Indicators of Quality

Note: Not all of the Indicators of Quality for this Dimension may apply to activities directly performed by supportive housing providers operating tenant-based supportive housing initiatives or providers utilizing scattered-site settings or master-leasing strategies. For example, such organizations may not be responsible for the performance of leasing or lease-enforcement activities, for maintenance or replacement activities, or for asset management activities.

1. Staff maintain, review, and regularly update appropriate Policy and Procedure Manuals and Plans, such as: Property Management Operations Manuals; Asset Management Plans; Maintenance Policies and Procedures Manuals; Compliance Manuals; Safety and Emergency Plans; and Staff Orientation and Training Manuals; and Personnel Policies and Procedures Manuals.

**Questions to Consider:** Are Policy and Procedure Manuals complete and are they updated regularly? Who is involved in updating or revising policies and procedures?

Notes >>

2. Property management policies, procedures and activities fully comply with applicable laws, regulations, and standards, including Fair Housing laws, Landlord - Tenant laws, the Americans with Disabilities Act, and Section 504 of the Rehabilitation Act (if federally-funded).

**Questions to Consider:** Have policies and procedures, and ongoing practices, been reviewed for compliance by persons with a thorough understanding of the relevant laws and/or regulations? Do staff have questions about how to comply with Fair Housing laws, Landlord/Tenant laws or other legal requirements?

Notes >>

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Key Indicators of Quality (continued)

3. Delivery of property management services is consistent with the philosophy and goals of the supportive housing opportunities being provided.

Questions to Consider: Can Property Management staff state the goals of the housing project? How does property management staff support the success of tenants in maintaining housing stability? Are property management services adapted when necessary and feasible, to support the goals of the housing project?

4. Property management staff partner with supportive services staff to implement effective, coordinated approaches for addressing issues resulting from substance use, relapse, and mental health crises, with a focus on fostering housing stability.

Questions to Consider: How do property management and supportive services staff coordinate their efforts when tenant issues arise that may impact housing stability? Are there mechanisms in place to foster regular communication between the partners? Do property management staff have a clear understanding of the strategies they can use to foster housing stability, in partnership with services staff?

5. Staff members adhere to a comprehensive, written plan and schedule for monitoring and reporting on financial performance in order to ensure financial sustainability.

Questions to Consider: Is there a written plan for ensuring financial sustainability? Are monitoring and reporting activities conducted as described in the plan? Is the plan sufficient to ensure financial stability?

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality

Property Management Staffing Plan

1. The property management staffing plan ensures manageable workloads for staff while also ensuring adequate site coverage by qualified staff and supervisory personnel, including maintenance staff and front desk staff, if any.

   A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed

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2. A plan for 24-hour crisis coverage is in place to address urgent issues, and there is a clearly-communicated plan in place for tenants to reach staff quickly.

   A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed

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3. The property management staffing plan includes employing qualified tenants of the supportive housing project, when possible.

   A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed

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Safety and Security

1. A written Emergency Plan clearly delineates procedures for responding appropriately and promptly to tenant emergencies, including: psychiatric emergencies; violent or homicidal ideation/behavior; suicidal ideation/behavior; medical emergencies; drug overdoses; and death on the premises.

   A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed

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A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Safety and Security (continued)

2. A written Emergency Plan clearly delineates: procedures for responding to crises involving the physical plant, such as fire or natural disasters; emergency evacuation procedures; and systems for ensuring adequate provision of oversight and back-up support, including on-call coverage, in case of emergencies.

   A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed

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3. A written Emergency Plan clearly delineates the roles of property management and social service staff in responding to emergencies and crises.

   A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed

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4. A written Incident Review Policy explicitly involves staff and tenants (as appropriate) in the review of crises, emergencies, and other incidents, leading to the development of plans for corrective actions and follow-up.

   A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed

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Assessing Additional Indicators of Quality (continued)

Safety and Security (continued)

5. Written policies and procedures describe protocols for addressing and reporting child abuse and neglect, elder abuse and neglect, sexual abuse, domestic violence, and other forms of abuse, and staff are trained on the policies and procedures.

6. Tenants are encouraged to create household Emergency Plans, including emergency contact information, which are updated regularly and are accessible by staff.

Communication with Tenants

1. Prior to lease-signing, tenants receive information regarding how monthly utility expenses will be calculated, as well as any other non-rent expenses they might incur (e.g. parking fees, trash removal fees, fees for late payments, etc.)

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Communication with Tenants (continued)

2. No later than within 3 days of move in, tenants receive orientation to the building and community, including explanations of: their responsibilities as leaseholders; property management and services staffs’ roles and responsibilities; how to request repairs; what to do in emergency situations (including evacuation routes and location of safety equipment); who to contact with concerns or in emergencies; a description of available services; and a description of resources and services available within the surrounding community.

3. No later than within two weeks of move-in, staff ensure that tenants know or are offered training on how to stay in compliance with their lease, including how to keep their unit clean, complying with house rules, rent payment, behavioral expectations, and other issues that can threaten tenancy.

Coordination with Supportive Services

1. Property management staff members receive cross-training to facilitate understanding of supportive services staff responsibilities.

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Coordination with Supportive Services (continued)

2. Regularly scheduled forums are held at least monthly (and preferably more frequently) for supportive services and property management staff to discuss their roles, the coordination of their efforts, any current issues, and to address gaps in services and operations.

3. Property management and services staff members coordinate their efforts to help prevent evictions and to ensure tenants facing eviction have access to necessary services and supports.

4. Property management staff members educate referral sources and coordinate with them, in order to facilitate the receipt of complete applications from potential tenants and reduce the number of rejected applications.

5. Property management staff members can identify tenants with unmet service needs and know when to connect tenants to services staff.

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Coordination with Supportive Services (continued)

6. Property management staff members work with supportive services staff members to support the development of rent repayment plans for tenants in rent arrears.

Notes >>

7. Policies and procedures addressing property damage by tenants provide appropriate opportunities for tenants to rectify the issues in order to support housing stability.

Notes >>

Financial and Asset Management

1. An Asset Management Plan documents the policies, strategies, financing plans, and reporting systems that will be used to sustain and ensure the continued viability of the project’s capital assets.

Notes >>

2. The sponsor maintains adequate financial tracking records to monitor trends and can document that the project performs well against the annual budget, collects all allowable budgeted fees and reimbursements, can meet all financial obligations, and is not in default on any loans.

Notes >>

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Financial and Asset Management (continued)

3. The financing plan ensures that there is stable, adequate funding for staffing needs and for the effective management of all capital assets, including adequate operating reserves and reserves needed for future capital improvements and replacement activities.

4. Staff members demonstrate a thorough understanding of financial management procedures, reporting, and other compliance activities required by all financing sources.

Staff Development and Training

In order to help ensure the achievement of quality, staff members involved in performing property management and asset management activities should receive initial and ongoing training relevant to their specific roles and responsibilities, including:

1. Mission, philosophy, and goals of the supportive housing, the Memorandum of Understanding among partner organizations, and all partners’ organizational structures, roles, and responsibilities.

2. Cross training to facilitate understanding of services staff responsibilities.

3. The services needs of the population(s) served in the supportive housing, and identifying tenants with unmet needs and making referrals to supportive services.

4. Cultural competency topics, which might include issues related to experiences of homelessness and/or experiences within correctional settings and other institutional settings.

5. Applicable local, state, and federal laws, regulations, and standards, including Fair Housing, Americans with Disabilities Act, Section 504 of the Rehabilitation Act (if federally funded), Tenant Rights, and Landlord - Tenant laws.

6. Completion of records, documentation, and reports in compliance with funders’ requirements.

7. Confidentiality and the security of tenant information, including information on what may and may not be shared with other staff, depending upon their roles.

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Staff Development and Training (continued)

8. All staff members are trained annually on relevant safety policies and procedures, including: Universal Precautions; basic first-aid procedures; the use of safety equipment; emergency evacuation routes; and crisis prevention, de-escalation, and management techniques.


10. Specific policies and procedures including: Tenant Screening and Selection Policies and Procedures; Incident Review; Reporting Abuse and Neglect; and Financial Management.

Notes >>

Other Notes

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Assessment of Dimension of Quality #6: Tenant Rights, Input, and Leadership

Implementing this Assessment

Overview
In high-quality supportive housing, tenant rights are protected within consistently-enforced policies and procedures, tenants are provided with meaningful input and leadership opportunities, and staff - tenant relationships are characterized by respect and trust. This Assessment Tool is intended to help organizations identify approaches and strategies for creating environments in which tenants can trust that their rights are protected, in which communications between staff and tenants are respectful, and in which tenants’ voices and choices are valued.

Materials Needed to Complete this Assessment:
Completion of this section may require reviewing information from a number of sources.

Organizational Documents and Manuals:
- Housing Application
- Tenant Lease Agreement
- Tenant Education Materials
- Tenant Selection Plan
- House Rules
- Supportive Services Plan
- Tenant and Consumer Rights Statements
- Staff Development Plans and Records

Policies and Procedures Regarding:
- Orientation of Tenants
- Eligibility Screening and Tenant Selection
- Admission Criteria for Services Programs
- Eviction Criteria
- Reasonable Accommodations
- Complaint and Grievance Procedures
- Access to Advocacy and Legal Services
- Privacy, Confidentiality, and Security of Tenant Information
- Drug and Alcohol Use
- Absences from Housing Unit
- Key Control and Staff Access to Units
- Visitors and Overnight Guests
- Reporting of Abuse
- Roles and Responsibilities of Staff
- Individualized Services Planning
- “No Retaliation” Policies
- Lease Enforcement

Additional Sources of Information:
- Interviews with Tenants
- Interviews with Key Staff
- Tenant Satisfaction Surveys
- Americans with Disabilities Act
- Section 504 of the Rehabilitation Act (if federally funded)
- Tenant Records
- Fair Housing Laws
- Landlord - Tenant Laws
- Local, State, and Federal Laws Regarding Privacy and Confidentiality (including HIPAA)
- Funders’ guidelines

Assessment Rating Scale
The following scale should be used in performing this assessment:

A - No Improvement Needed
B - Minimal Improvement Needed
C - Improvement Needed
D - Significant Improvement Needed
Assessing Key Indicators of Quality

1. Each tenant household has a lease granting the same rights as those granted to other lease-holders in the community, including the right to determine whether to participate in supportive services or not, with no limits on length of tenancy, as long as the terms and conditions of the lease or agreement are met.

*Questions to Consider:* Are there any ways in which the lease is different from those used in the private market? Has the lease been reviewed by persons with knowledge of Fair Housing laws, Landlord - Tenant laws, the Americans with Disabilities Act, and Section 504 of the Rehabilitation Act (if federally-funded)?

Notes >>

2. The terms of leases are consistently applied and enforced with all tenant households.

*Questions to Consider:* What processes are in place to ensure that the terms of leases are consistently applied and enforced? Do staff receive training regarding the enforcement of lease terms? Do tenants report that they believe that leases are consistently applied and enforced?

Notes >>

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Key Indicators of Quality (continued)

3. All involved organizations have tenant and consumer rights policies and procedures that comply with applicable laws, regulations, and standards, including Fair Housing laws, Landlord - Tenant laws, the Americans with Disabilities Act, and with Section 504 of the Rehabilitation Act (if federally-funded).

Questions to Consider: Are tenant and consumer rights policies and procedures understood by staff and tenants? Is there a process in place for regular review of the policies and procedures by staff and tenants?

Notes >>

4. All involved organizations actively seek tenant input in decision-making at their highest organizational levels, support tenants in forming tenant councils, and meet regularly with any tenant-led organizations.

Questions to Consider: What efforts have been made to support tenants in forming tenant councils or other tenant-led organizations? Do tenant input opportunities result in meaningful changes within the involved organizations?

Notes >>

5. All involved organizations have appropriate written complaint and grievance policies that are provided and explained to tenants and that are consistently implemented.

Questions to Consider: What process is in place to ensure that tenants and staff review the complaint and grievance policies, and understand them? What process is in place to ensure that the policies are consistently enforced?

Notes >>

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality

Confidentiality and Respectful Communication

1. Staff strive to create a welcoming, non-judgmental, and respectful atmosphere.

2. The confidentiality and security of tenant information is managed in compliance with relevant local, state and federal laws.

3. Written policies and procedures regarding tenant privacy and confidentiality are provided to staff and tenants and are consistently enforced.

4. Supportive services records and files and property management records and files are kept in separate and secured storage.

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Confidentiality and Respectful Communication (continued)

5. Staff respect the privacy and confidentiality of tenants’ communications, including communications with other staff, personal mail, e-mail, and telephone calls.

Notes >>

Tenant Choice

1. Tenants have the right to determine the specific services in which they wish to participate, or decline to participate in, and staff are respectful of tenants' choices.

Notes >>

2. Tenants are actively involved in the design, development, and implementation of their individualized service plans.

Notes >>

3. Tenants have a clear understanding of their options, rights and responsibilities within their individualized services plans.

Notes >>

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Tenant Choice (continued)

4. Staff fully inform tenants about their housing options and the choices available to them.

5. Staff fully inform tenants about their services options, including the right to decline to participate in services.

6. As funders’ guidelines, local codes, unit configuration, and eligibility criteria allow, tenants have control over the composition of their household, and may add eligible persons to their household, if they choose.

Information and Education Regarding Policies and Procedures

1. All written materials related to policies and procedures and tenant and consumer rights (including leases, house rules, and grievance procedures) provide clear guidance regarding tenant and staff responsibilities.

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Information and Education Regarding Policies and Procedures (continued)

2. The distinct roles and responsibilities of property management staff and supportive services staff are regularly and clearly communicated to tenants.

3. Applicants and tenants are regularly provided with written documentation, verbal explanations, and opportunities to ask questions regarding all of the following:
   - Tenant rights and responsibilities under the terms and conditions of the lease and house rules;
   - Eviction criteria;
   - Consumer rights, including criteria for denial of access to services;
   - How to access advocacy services, legal services and/or representation;
   - Reasonable accommodations and reasonable modifications;
   - Policies regarding absences from unit, including if tenant is hospitalized or incarcerated;
   - Control of keys and conditions under which staff can enter the unit;
   - Policies related to drug and alcohol use;
   - Policies regarding visitors and overnight guests;
   - Policies regarding pets;
   - Policies regarding smoking; and
   - Complaint and grievance procedures.

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Information and Education Regarding Policies and Procedures (continued)

4. Tenants are regularly oriented to staffs’ responsibility to report abuse and when reports of abuse must be made, tenants are both notified and supported in addressing any consequences that may result from the report having been made.

   ○ A   ○ B   ○ C   ○ D

Tenant Input and Leadership

1. Leadership development opportunities for tenants are created and/or supported by all partners, such as training opportunities, employment opportunities, opportunities to facilitate peer self-help groups, and opportunities for participation within tenant councils, other tenant-led organizations, and/or other decision-making bodies.

   ○ A   ○ B   ○ C   ○ D

2. Tenants, tenant councils, and/or other tenant-led organizations are provided with regular opportunities to provide input regarding all policies related to tenant and consumer rights, including leases, house rules, and grievance procedures.

   ○ A   ○ B   ○ C   ○ D

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Tenant Input and Leadership (continued)

3. Tenants, tenant councils, and/or other tenant-led organizations are provided with regular opportunities to provide input regarding the design, development, and delivery of supportive services.

4. Tenants who participate in leadership development and input opportunities are protected by a “no-retaliation” policy.

Staff Development and Training

In order to help ensure the achievement of quality, staff members involved in performing property management and asset management activities should receive initial and ongoing training relevant to their specific roles and responsibilities, including:

1. Terms and conditions of the lease agreement and house rules.
2. Fair Housing, Landlord -Tenant Laws, and policies and procedures regarding tenant and consumer rights.
3. Confidentiality and the security of tenant information, including what may and may not be shared with other staff, depending on their roles, and completion of records, documentation, and reports in compliance with funders’ confidentiality requirements.
4. Grievance policies and procedures.
5. Requirements for reporting abuse and neglect.
6. Reasonable accommodations and reasonable modifications, the Americans with Disabilities Act, and Section 504 of the Rehabilitation Act (if federally funded).
7. Other applicable local, state, federal laws, regulations and standards.

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Staff Development and Training (continued)

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A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessment of Dimension of Quality #7: Data, Documentation, and Evaluation

Implementing this Assessment

Overview
In high-quality supportive housing, all involved organizations reliably capture accurate and meaningful data about the effectiveness, efficiency, and outcomes of their activities, and use this data to facilitate, and improve, the performance of those activities on an ongoing basis. This Assessment Tool is intended to help organizations to ensure that they can demonstrate that their efforts produce positive outcomes and fully comply with all applicable standards.

Materials Needed to Complete this Assessment:
Completion of this section may require reviewing information from a number of sources.

Organizational Documents and Manuals:
- Quality Improvement Plan
- Outcomes and Performance Goals
- Reports Regarding Quality Improvement and Outcomes Measurement Activities
- Tenant Satisfaction Survey and Results
- Staff Development Plans and Records

Policies and Procedures Regarding:
- Confidentiality and Privacy of Tenant Information
- Security of Tenant Information
- Accuracy of Tenant Information
- Staff Access to Data Management Systems, Records and Tenant Information.
- Permitted Uses of Tenant Information

Additional Sources of Information:
- Interviews with Key Staff
- Interviews with Tenants
- Local, State, and Federal Laws Regarding Privacy and Security of Information (including HIPAA)

Assessment Rating Scale
The following scale should be used in performing this assessment:
A - No Improvement Needed
B - Minimal Improvement Needed
C - Improvement Needed
D - Significant Improvement Needed
Assessing Key Indicators of Quality

1. The involved organizations track data related to the effectiveness and efficiency of both services delivery and property management operations.

   Questions to Consider: Do involved organizations share information regarding their efficiency and efficacy?

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2. Plans for outcomes measurements include, at minimum, measures pertaining to: numbers and characteristics of tenants; housing outcomes; services utilization; changes in income and employment; property management operations; and tenant satisfaction.

   Questions to Consider: Can existing data systems provide data regarding these measures? Are there other outcomes or results that would be useful to measure?

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3. A quality improvement plan is in place to monitor and improve the projects’ overall quality, on an ongoing basis, describes how input is regularly obtained from tenants, involved organizations, funders, and other relevant stakeholders, and includes relevant performance goals for both supportive services and property management activities.

   Questions to Consider: Are performance goals, and current progress or lack of progress toward those goals, regularly shared with staff? Do stakeholders have a variety of ways in which to provide input about the supportive housing?

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A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
4. There is a regularly scheduled process for reviewing supportive services records and property management records and ensuring completeness, accuracy, timeliness of documentation, and compliance with funders’ guidelines and other applicable standards.

**Questions to Consider**: Do staff have questions regarding funders guidelines or other applicable standards? Are there clear lines of accountability for ensuring that record reviews are conducted thoroughly and in a timely manner?

5. The confidentiality and security of tenant information within the project is managed in compliance with funders’ guidelines, local, state, and federal laws, and other applicable standards.

**Questions to Consider**: Do staff receive training regarding the confidentiality and security of electronic and paper records? Have organizational procedures pertaining to the security and confidentiality of records been reviewed by someone with knowledge of applicable guidelines, laws and standards?
Assessing Additional Indicators of Quality

Quality Improvement Plan

1. The quality improvement plan describes the data gathering process, the data review process (including plans for regular review by senior management, staff, and tenants), and the reporting process.

2. The quality improvement plan describes plans for the evaluation of the staff training and development program.

3. Quality improvement plans and processes are efficient (e.g., data is not gathered that will not be used), effective and, whenever possible, cost neutral.

4. The data gathered during the quality improvement process is used to improve services and operations in meaningful ways.

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Quality Improvement Plan (continued)

5. The quality improvement plan is reviewed and updated at least annually.

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed

Documentation of Outcomes and Other Results

1. In documenting the number and characteristics of tenants served, involved organizations document that tenant characteristics match the eligibility criteria for the housing.

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed

2. In documenting housing outcomes, involved organizations document: the number/percentage of tenants who remain in supportive housing after one year; and, of those who exit supportive housing, the number/percentage who leave for another stable housing situation.

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed

3. In documenting services utilization, involved organizations document: the number/percentage of tenants receiving services in supportive housing; and the type of services they receive.

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Documentation of Outcomes and Other Results (continued)

4. In documenting tenant satisfaction, involved organizations document tenants’ satisfaction with: the safety and cleanliness of their housing; the policies, rules, and procedures within the housing; the quality and appropriateness of services; the availability of staff; staff communication skills; and staff responsiveness to tenant needs.  

   A  B  C  D

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5. In documenting property management operations, involved organizations document: processing time for applications for housing; management of waiting list and screening processes in compliance with policies; unit turnover rate; vacancy rates; and response time to work orders for maintenance requests.  

   A  B  C  D

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6. In documenting changes in income and employment, involved organizations document changes in the following after tenants are housed: number/percentage of tenants who are employed; amount of earned income; number/percentage of tenants with SSI and/or other income supports; and amount of total income.  

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7. If capacity allows, involved organizations document changes in tenants' utilization of other health services and institutions (including shelters, emergency rooms, hospitals, inpatient and outpatient health and mental health services, and jails and prisons) before and after entry into supportive housing, and document savings based upon costs for utilization of each of those systems.  

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A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Documentation of Outcomes and Other Results (continued)

8. The involved organizations can demonstrate their progress (or lack of progress) toward the performance goals established in the quality improvement plan.

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9. The organization or partners can demonstrate how outcomes data is gathered and how the reliability and validity of their outcomes data is ensured.

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10. If capacity allows, the organization participates in research projects conducted in order to further the expansion and knowledge of the supportive housing industry.

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Tenant and Other Stakeholder Input

1. A Tenant Satisfaction Survey that addresses tenants' experience of both property management operations and of supportive services delivery is administered with current tenants at least annually, and with all tenants who are moving out.

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A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Tenant and Other Stakeholder Input (continued)

2. The Tenant Satisfaction Survey is provided in tenants’ languages of origin, is written at an appropriate literacy level, and a neutral party is available to assist individuals with low literacy skills to complete the survey.

3. Summary reports based upon the data gathered from stakeholders are shared with all individuals who contributed data or input.

Records and Data Systems

1. All partners maintain accurate documentation of their activities and services in compliance with funding source requirements, administrative and statutory codes, agency policy, and in accordance with ethical standards.

2. Records documenting the results of all required audits and inspections are maintained.

A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Assessing Additional Indicators of Quality (continued)

Records and Data Systems (continued)

3. Documentation of adherence to the established maintenance schedule is maintained.

4. Deficiencies found during any review processes are corrected within scheduled timeframes.

5. Services records and property management records are stored separately.

6. Clear policies and procedures exist regarding staff access to tenant services records, property management records, and administrative data systems.
Assessing Additional Indicators of Quality (continued)

Records and Data Systems (continued)

7. All electronic and paper records are stored in a secure and confidential manner, in accordance with funders' guidelines, local, state, and federal laws, and other applicable standards.

8. The confidentiality and security of tenant information within the project is managed in a way that is compliant with relevant local, state and federal laws.

9. Written policies and procedures regarding tenant privacy and confidentiality are provided to staff and tenants and are consistently enforced.
Assessing Additional Indicators of Quality (continued)

Staff Development and Training

In order to help ensure the achievement of quality under this Dimension, staff members involved should receive initial and ongoing training relevant to their specific roles and responsibilities, including:

1. The Quality Improvement Plan.
2. Outcomes measurement and tracking.
3. Use of Data Management systems.
4. Tenant Record review processes.
5. Policies and procedures regarding:
   - Privacy and confidentiality of tenant information, including what may and may not be shared with other staff, depending on their roles.
   - Staff responsibilities with regards to maintaining tenant records, tracking outcomes and submitting or entering data into data management systems.
   - Maintaining the security of tenant information when traveling from site to site.
   - Staff access to tenant records and administrative data systems.
   - Local, state, and federal laws, and funders' guidelines, regarding the confidentiality and security of tenant information.
6. Documentation of activities in compliance with funding source requirements, administrative and statutory codes, agency policy and ethical standards.

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A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Additional Notes from Assessment and Identified Next Steps

Other Notes

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A - No Improvement Needed; B - Minimal Improvement Needed; C - Improvement Needed; D - Significant Improvement Needed
Additional Resources from CSH

In addition to this document, CSH has prepared *The Seven Dimensions of Quality for Supportive Housing: Definitions and Indicators* and *The Seven Dimensions of Quality for Supportive Housing: Additional Materials and Resources*, available at [www.csh.org/DimensionsofQuality](http://www.csh.org/DimensionsofQuality). These companion pieces are designed to help organizations to understand issues affecting the quality of supportive housing across these Seven Dimensions of Quality and to identify specific tools and resources that can help strengthen or improve their practices within any of the Dimensions. In addition, CSH’s website, [www.csh.org](http://www.csh.org), provides organizations with access to a diverse array of tools, informational materials, publications, manuals, and sample documents to help communities create permanent housing with services to prevent and end homelessness. If you have questions or comments regarding any of these resources, please contact CSH at info@csh.org.

**CSH’S WEB-BASED TOOLKITS**

**Toolkit for Developing and Operating Supportive Housing**
Made possible through the generous support of the MetLife Foundation, and available at [www.csh.org/Toolkit2](http://www.csh.org/Toolkit2), this Toolkit currently contains more than 150 informational pieces, tools, and sample documents that can help organizations address key challenges in the planning, development, and on-going operation of permanent supportive housing projects. This Toolkit is organized by the following topic sections: Understanding Permanent Supportive Housing; Development and Finance; Housing Operations; and Supportive Services.

**Toolkit for Advancing Systems Change**
CSH’s newest web-based Toolkit, available at [www.csh.org/SystemsChangeToolkit](http://www.csh.org/SystemsChangeToolkit), documents approaches to - and successes at - influencing and changing systems by linking Toolkit users to more than 175 discrete informational pieces, tools, sample documents, and relevant websites. These resources include materials developed by CSH, as well as examples drawn from public, private, and non-profit partners around the country. The contents of this Toolkit have been organized beginning with an Overview of Systems Change, and then by the six Building Blocks of Systems Change: Leadership; Collaborative Planning; Financial Leverage; Provider Infrastructure; Credible Data; and Network of Allies.

**Toolkit for Connecting Supportive Housing Tenants to Employment**
Made possible through the generous support of the MetLife Foundation, and available at [www.csh.org/EmploymentToolkit](http://www.csh.org/EmploymentToolkit), this Toolkit provides access to resources - many that were developed by CSH and also materials drawn from a variety of other sources - to help supportive housing organizations, workforce partners, and employers address key challenges in the planning, implementation, and on-going provision of employment-related services and programs. The contents of the Toolkit are organized into six sections: Building Your Team; Tenant Outreach and Engagement; Partnership with Employers; Workforce Resources and Community Partners; Tenant Vocational Assessment and Career Planning; and Finding Jobs and Advancing Careers.

**Toolkit for Ending Long-Term Homelessness**
Made possible through the generous support of the MetLife Foundation, and available at [www.csh.org/Toolkit](http://www.csh.org/Toolkit), this Toolkit is an interactive resource that highlights the most promising practices for serving people who have experienced long-term homelessness. The Toolkit’s contents include profiles of supportive housing programs and projects from across the country that are successfully housing people who have been homeless for the long term; interactive photo tours of eight of these projects, showcasing good design and service programs; sample documents from each of the programs profiled, such as leases and memorandums of understanding; and a full list of additional resources.
OTHER CSH WEB-BASED RESOURCES

CSH’s website also features many other tools and resources intended to help strengthen the supportive housing industry and to inform efforts to end homelessness, including:

Publications Web Page

CSH’s Publications web page, available at www.csh.org/Publications, provides access to reports, studies, and manuals aimed at helping nonprofits and government develop new and better ways to meet the health, housing and employment needs of those at the fringes of society. There are currently more than 60 publications and manuals available, covering topics ranging from development to research and evaluation to strategies for creating systems change. The vast majority of these publications and manuals are available for download in PDF form for free.

Chronic Homelessness Employment Technical Assistance (CHETA) Center

Under a U.S. Department of Labor Office of Disability Employment Policy (USDOL-ODEP) cooperative agreement, CSH and Advocates for Human Potential (AHP) collaborated to form the Chronic Homelessness Employment Technical Assistance (CHETA) Center. The Center offered technical assistance and training to providers and policy recommendations to USDOL-ODEP regarding serving people who are chronically homeless in employment programs. A wide variety of tools and resources created through the CHETA Center are available at www.csh.org/CHETA.

Supportive Housing Training Curricula

Available at www.csh.org/Training, CSH’s website provides access to training curricula that address a wide array of issues - from housing financing to property management to supportive services program development to tenant/staff relationships to successfully housing persons with substance use issues. The Supportive Housing Training Series currently includes eleven curricula that were developed through collaboration among the U.S. Department of Housing and Urban Development (HUD), the Center for Urban Community Services, and CSH. These curricula explore best practices and provide guidance regarding supportive housing development, operations, and services, and can also be accessed via HUD’s Homelessness Resource Exchange at http://www.hudhre.info/.

Supportive Housing Financing Guide

Available at www.csh.org/Financing, the Financing Guide provides details on all major federal supportive housing financing sources, providing program descriptions and links to regulations; resources on everything from how to use Medicaid in supportive housing to understanding Low Income Housing Tax Credits; and links to current funding opportunities, including HUD’s current Continuum of Care Notice of Funding Availability. Created especially for housing developers, service providers, and supportive housing advocates, the Guide includes sections regarding Capital Financing Sources, Operating Financing Sources, and Services Financing Sources.

Policy and Advocacy Web Pages

Available at www.csh.org/Policy, these web pages provide regular updates on supportive housing policy and advocacy issues, including information regarding national supportive housing policy priorities, regular updates regarding the status of policy and advocacy efforts, and other tools and resources for advocates.