**Activity 1: Assessment Interview and Housing Barriers**

Read the following case scenarios that include information only from the first interview conducted with them. Then pick one case or all three and reflect or discuss the following:

* *What additional information would you want for each person so you can identify Tenant Screening and possible Housing Retention Barriers?*
* *Where would you get it?*

**Use the worksheet on page 3 to track your insights and notes.**

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**Case #1: Robert, 31**

At the time Robert applied for the Rapid Rehousing (RRH) program, he had been staying in a homeless shelter for three months. Initially he didn’t want to ask for help, but while staying in the shelter he had applied for five apartments and been turned down for each. After being found eligible and accepted for assistance, he met with his new case manager and initially provided the following information:

* In the last two years, Robert lived in four different apartments. He said he left each one because the landlords were slumlords and kicked him out for complaining to the Housing Department about the condition of the apartments and his friends.
* Robert says his recent rental applications were turned down because his prior landlords put the word out that he would complain to Housing.
* Robert has worked in construction ever since dropping out of high school when he was 17. He works day labor mostly, but sometimes finds work in the parking lot of the local Home Depot where contractors pick up workers. When he works, he makes good money and has a good life. But sometimes he can’t find work.
* Right now, he has no income. He hasn’t worked since entering shelter—he said it is too hard to sleep, keep clean, and catch an early morning bus to look for work.

**Case #2: Rhonda, 24, and her 8-yo daughter Natasha**

When the Targeted Homelessness Prevention (THP) program received a referral for Rhonda and her daughter, they had been doubled up with various family members and friends for three months. Her family will no longer let her stay and her friend’s landlord has given her friend one week to have the guest leave or face eviction. Rhonda’s friend suggested she call a local charity to get help, as well as the local homeless shelter. Rhonda called the shelter hotline in town and was engaged in a problem-solving conversation where Rhonda learned about the shelter, while also exploring other options to avoid shelter. Since Rhonda didn’t need shelter that night, Rhonda was referred to the THP program for additional problem-solving help.

The next day, Rhonda enrolled in THP and met with her new case manager. After assurances are provided to her friend (and her friend’s landlord), Rhonda is allowed to stay a few more weeks while she finds another place. As they start focusing on longer-term housing, Rhonda shares the following with her case manager:

* She lived in two apartments in the past two years. She had to move out of the first one when the landlord raised the rent to a level she couldn’t afford. She lost the second when she lost her job and was unable to pay rent, though she said she also had a boyfriend who “was around” and she clearly didn’t want to talk about.
* Rhonda has been a certified Nursing Assistant (CNA) for the past few years. She says she lost her job at the last nursing home she worked at because they switched her to night shift and she couldn’t find any night-time daycare. She was earning 16.00/hour when she left. She states that she never wants another CNA job.

**Case #3: George, 64**

George had been staying in the local shelter for the past two weeks when he was screened and referred to RRH. He had been married for 28 years, but when his wife passed 10 years ago, he began drinking heavily and lost his house. Things steadily became more difficult for George, and after losing his last apartment he tried to stay with a friend but ultimately couldn’t stay and entered the shelter.

After being screened for eligibility and enrolled in RRH, George met with his case manager and shared the following:

* George receives SSI for a mental health disability and has health conditions that put him at higher risk in a shelter. He hasn’t worked for over ten years.
* He has lived in three apartments in the past two years and is uncertain why the landlords told him to leave. He thinks there may have been problems with the building. He said he did pay his rent late sometimes, but the landlords never objected. He thinks they liked him OK.
* He was arrested a few times for “minor offenses” and says his brother had to “bail him out” one time.

* *What additional information would you want for each person so you can identify Tenant Screening and possible Housing Retention Barriers?*
* *Where would you get it?*

**Robert:**

**Rhonda:**

**George:**

**Activity 2: Further Assessing Housing Barriers**

Read the same case scenarios, but this time with new assessment information from other sources described below. Then pick one case or all three and reflect or discuss the following:

* *With all the information you now have, list the Tenant Screening Barriers and Housing Retention Barriers for each person.*
* *How serious are the tenant screening barriers?*
* *What kind of landlords would accept the person—will additional incentives be needed? Other assurances?*
* *What could immediately affect their housing stability?*

**Use the worksheet on pages 7-8 to identify key housing barriers you identify for each.**

**Case #1: Robert**

**SOURCES:**

* Assessment interview
* Online Tenant Screening Report
* Landlord references

**Housing History:**

Confirmed four addresses in past two years.

Screening report shows five filed evictions (for lease violations) during this time.

None of the four landlords would rent to Robert again, none returned his damage deposit when he left. One landlord contacted with Robert’s consent wouldn’t give details about the lease violation except to say that Robert seemed like a good tenant but couldn’t control his many guests and there were numerous police calls. When asked about this, Robert said his friends sometimes used his apartment to sell drugs and this would get him into trouble with the landlord.

**Criminal Records**:

Two arrests for drug trafficking, no convictions

**Credit History:**

Fair, no judgments, late payments

**Employment References:**

Prior supervisor would hire him again.

**Case #2: Rhonda and her daughter**

**SOURCES:**

* Assessment interview
* Online Tenant Screening Report
* Landlord references

**Housing History:**

Confirmed two addresses in past two years.

Screening report shows no filed evictions during this time.

Landlord references: The first landlord confirmed that she gave notice when he raised the rent. He gave her back her security deposit and would rent to her again. The second landlord reported that Rhonda told him she had lost her job. He gave her some time to find another job, but after two months she left during the night and still owes rent for that period. He kept her damage deposit and applied it to her arrears. He might rent to her again but only if she pays him back and has a steady job.

**Criminal Records**:

Only minor traffic violations

**Credit History:**

Fair, no judgments, late payments on credit card, rent owed.

**Employment References:**

When asked about prior employment references, Rhonda indicated prior employers would not hire her again or give her a positive reference, but she wouldn’t share why only to say the staff were always lying about her to the supervisor, claiming she stole medications.

**Case #3: George**

**SOURCES:**

* Assessment interview
* Online Tenant Screening Report
* Landlord references

**Housing History:**

Confirmed three addresses in past two years.

Screening report shows one eviction (for failure to pay rent) during this time.

Most recent former landlord was contacted and said he paid rent most of the time, on time, although sometimes he was short or paid late. No reported lease violations or concerns, however, he was not given his damage deposit back as his apartment was left very dirty. Landlord did not renew lease as owner was renovating the building.

**Criminal Records**:

Two arrests for loitering, two for panhandling

**Credit History:**

No recent negative credit history, except two months rental arrears

**Income/Employment References:**

No employment listed, SSI verified

* *With all the information you now have,* ***list the Tenant Screening Barriers and Housing Retention Barriers for each person below****.*
* *How serious are the tenant screening barriers?*
* *What kind of landlords would accept the person—will additional incentives be needed? Other assurances?*
* *What could immediately affect their housing stability?*

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| **ROBERT M.** | |
| **Tenant Screening Barriers** | **Housing Retention Barriers** |
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| **RHONDA and NATASHA** | |
| **Tenant Screening Barriers** | **Housing Retention Barriers** |
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| **GEORGE** | |
| **Tenant Screening Barriers** | **Housing Retention Barriers** |
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**Activity 3: Initial Housing Search Plan**

1. Pick and re-read one scenario – George, Rhonda, or Robert’s – from earlier Activities, that include information from the first interview and then other sources, along with your notes on housing barriers.
2. Use the Initial Housing Search Plan template below to develop an Initial Housing Search Plan for George, Rhonda, or Robert. (Note: the template is only for purposes of this activity. Plans created with clients should also include date created, signatures, etc.)
3. Discuss or reflect on the following as you develop each initial housing plan:

* *What support can I/my program offer each client to help them secure safe, stable housing as quickly as possible?*
* *What other assistance might each client need that I/our program doesn’t currently offer?*
* *What other partners/resources may be needed?*

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**INITIAL HOUSING SEARCH PLAN**

**Client Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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| **GOAL** | **ACTION STEPS** | **WHO IS RESPONSIBLE** | **BY WHEN** |
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| **GOAL** | **ACTION STEPS** | **WHO IS RESPONSIBLE** | **BY WHEN** |
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| **GOAL** | **ACTION STEPS** | **WHO IS RESPONSIBLE** | **BY WHEN** |
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**Activity 4: Housing Stabilization/Retention Plan**

Congratulations! George, Rhonda, and Robert are now housed!

1. Use the Housing Stabilization/Retention Plan template on the following pages to develop an initial Housing Stabilization/Retention Plan for Robert, Rhonda, or George. (Note: the template is only for purposes of this activity. Plans created with clients should also include date created, signatures, etc.)
2. Discuss or reflect on the following as you develop each housing plan:
   1. *What support can I/my program offer each client to help them secure safe, stable housing as quickly as possible?*
   2. *What other assistance might each client need that I/our program doesn’t currently offer?*
   3. *What other partners/resources may be needed?*

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**HOUSING STABILIZATION/RETENTION PLAN**

**Client Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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| **GOAL** | **ACTION STEPS** | **WHO IS RESPONSIBLE** | **BY WHEN** |
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| **GOAL** | **ACTION STEPS** | **WHO IS RESPONSIBLE** | **BY WHEN** |
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| **GOAL** | **ACTION STEPS** | **WHO IS RESPONSIBLE** | **BY WHEN** |
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**Activity 5: Case Review & Closure**

1. Pick and read one case scenario below for either Randall and Joyce.
2. Discuss or reflect on the case specific questions following each scenario.

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**Case Scenario: Randall**

Randall has been working with your program for nine months. He was initially very engaged with program services and was moved into permanent housing after only a two-month housing search process. His level of engagement took a downturn a few months ago, however, and it has been a challenge to get him to respond to phone calls or meet with his case manager. Randall’s only income is the $733 he gets from SSI. Rent for his 1-bedroom apartment is $800/month. He reported to the case manager at intake that he wanted to work, but several months of working with the local employment services department has not led to any job offers. Randall’s landlord has reported that he is a very good tenant and has been a good neighbor but is concerned that Randall will not be able to pay the rent after his time in the program is complete. You can only provide up to three more months of rent assistance for Randall before you reach the maximum of what your program funding allows.

*What next steps should you take to engage Randall?*

*What indicators do you see that Randall’s housing is stable – or not?*

*If closing his case, what else might you help Randall with so he successfully transitions and maintains housing, even if it’s not his current housing?*

**Case Scenario: Joyce**

Joyce moved into housing last month with her child after a lengthy six-month housing search. She suffers from PTSD after a significant traumatic experience while serving in the military. You assisted her with applying for service-connected disability benefits from the VA and she is now receiving just over $1800/month to support herself and her 6-year-old son. Joyce’s previous eviction and poor credit made locating suitable housing difficult, but you were able to work with a landlord sympathetic to the program to work around the screening barriers. Unfortunately, Joyce didn’t pay her initial portion of the shared rent this month (total rent is $900, she is expected to pay half while in the program) and several neighbors have complained to the landlord about the volume at which she watches TV in the house. You have encouraged Joyce to seek out counseling services through the VA to address her PTSD, but she has not gone.

*What housing stability indicators do you see, good or bad, and what do they tell you about Joyce’s housing situation and potential support needs?*

*How would you move forward in a person-centered way with Joyce?*

*How might you engage the landlord while you’re assisting Joyce?*

**Team/Self-Reflection Activity**

**At the conclusion of the training, reflect on the following questions by yourself or with other staff. Use this worksheet to document insights and next steps.**

* *What are we doing that is consistent with Housing-Focused Case Management practices?*
* *What program practices, policies or procedures may need to change to support effective Housing-Focused Case Management?*
* *How are we/am I engaging people “authentically” in order to promote a trusting, respectful and helpful relationship?*

* *What next steps should we/I take to make those changes?*