



# Supportive Services Planning Tools

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This document includes two tools for planning support services in supportive housing. The first three pages include a comprehensive outline of the issues that must be addressed in planning support services. The last two pages provide a step-by-step timeline with the key service planning milestones leading up to occupancy.

## 1. *Proposed Project*

### A. *Profile of Targeted Tenants*

1. What is the targeted tenancy? Why was this target population/mix selected? Do the sponsor, funding source(s) and community agree on the proposed tenant mix?
2. What support do you anticipate that the tenants will need at initial occupancy? In three years?
3. How will the service provider(s) respond to changes in the population over time, particularly for tenants with substance abuse issues, mental health challenges and/or HIV/AIDS? (e.g. relapse, decompensation, deteriorating health, etc.)

### B. *Philosophy of the Proposed Project*

1. What are the goals of the proposed project?
2. What is the service provider's underlying philosophy in delivering services?

### C. *Housing Model*

1. Will all the supportive housing tenants live in the same building or will they be scattered throughout multiple housing units in the community?
2. Will the housing be owned by a supportive housing provider or by a private property owner unaffiliated with the project?

### D. *Location/Community*

1. Are community resources and transportation accessible to tenants? If not, how will they be able to access needed resources?
2. Has the community expressed concerns? If so, how are these being addressed?
3. Who on staff is responsible for managing community relations?

### E. *Ownership/Management Structure*

1. Who is/will be the project owner? What is the owner's relationship to the sponsor?
2. Does the ownership involve a partnership between organizations? If so, are the roles and responsibilities of the partners articulated in a memorandum of understanding? If not, why?
3. Have the lead service provider and the property/housing manager defined their distinct roles in writing and discussed how they will coordinate?

## 2. *Comprehensive Services*

### A. *Philosophy*

1. How do the services support tenants in using stable housing as a platform for health, recovery and individual growth?



2. How will participation in voluntary services be encouraged? Has staff received the support they need to engage tenants in this service model?
3. How will tenants be involved in providing input into the services plan for the project, both initially and on an ongoing basis?
4. Will tenants be involved in evaluating the effectiveness of the services provided? If so, how?
5. Is there a system of accountability between property/housing management, service providers and tenants?

### *B. Types of Support Services*

1. What types of support services will be provided? The following are examples:
  - Case Management (i.e. service coordination)
  - New Tenant Orientation/Move-in Assistance
  - Education/GED
  - Employment Services
  - Crisis Intervention
  - Support Groups
  - Life Skills Education
  - Conflict Resolution & Mediation
  - Psychiatry Services
  - Bereavement Counseling
  - Recovery Readiness Services/Relapse Planning
  - Substance Abuse Counseling
  - Methadone Maintenance
  - Harm Reduction Services
  - Daily Living Skills Assistance
  - Physical Therapy
  - Occupational Therapy
  - Pain Management (HIV/AIDS)
  - Medical/Nursing/Visiting Nurse Care
  - Dental/Ophthalmology Services
  - Counseling (Individual/Group)
  - Recreational/Socialization
  - Entitlement Programs Assistance
  - Legal Assistance
  - Transportation
  - Food/Nutritional
  - Tenant Rights Education
2. Are the types and level of supportive services adequate for the population served?
3. Will each service be available to all of the tenants? When will working tenants have access to services?
4. Are language and literacy barriers addressed? How will staff address the varying backgrounds and cultures of tenants?
5. Where are services provided? How will the tenants access these locations?
6. How many tenants do you expect to use each service? With what frequency?

7. What is the staff/tenant ratio? How does this ratio compare to similar supportive housing projects?
8. Does the organization partner with other employment and training organizations?

*C. Staffing Pattern*

1. What are the shifts, days, hours, full-time/part-time status of the project staff?
2. Are salary levels sufficient and appropriate?
3. Does the staffing plan fit with the anticipated level of services provided? With the usage expected?
4. Is there bilingual/multi-cultural staff where necessary?
5. Is there an orientation program for new staff? Are there built-in opportunities for ongoing staff training?

*D. Management*

1. What is the record-keeping plan? What information will be kept? For what length of time?
2. What is the crisis management plan and incident review process?
3. What is the plan to assure continuous quality improvement?
4. What is the confidentiality protocol?
5. What is the grievance procedure for tenants?

*E. Funding*

1. Has funding for the services to be provided been secured? What is the likelihood that funding will be secured/renewed?
2. Is the amount and term of the service funding adequate for the population being served?
3. Are the funding requests within a reasonable range for anticipated funding sources?
4. What is the percentage breakdown of direct vs. administrative costs?
5. Who is responsible for collecting data and reporting to funders? How will the information be tracked?

**SUPPORTIVE SERVICES PLANNING AND START-UP MILESTONES**

ACTIVITY	Suggested Timeline	Target Date
<b>Draft Support Service Plan and Budget</b>		
<ul style="list-style-type: none"> <li>Review all target population/eligibility criteria contained in housing and services funding commitments and reconcile any differences.</li> </ul>	During early predevelopment	
<ul style="list-style-type: none"> <li>Review and verify all budget and leveraging commitments and determine whether any resources committed by other services providers or agencies are contingent upon this project serving tenants who are currently participating in or eligible for those services</li> <li>Identify the pre-operating work opportunities (i.e., construction, planning and marketing) for tenants and develop hiring plan (and/or find local hiring hall/provider as partner).</li> </ul>	During feasibility phase of predevelopment	
<ul style="list-style-type: none"> <li>If project includes building of new units, ensure that service provider and tenant feedback are included in the project design.</li> </ul>	Before construction starts	

<b>Review and Negotiate Service Plan and Budget among all Service Partners and Other Stakeholders</b>	<b>Time prior to tenants moving into units...</b>	
<ul style="list-style-type: none"> <li>Host first meeting with service partners, determine Support Services Planning Meeting Schedule, and process for finalizing support service plan.</li> <li>Discuss and identify places for consumers/potential tenants to play a role at the planning level as part of the oversight or advisory group.</li> </ul>	6 months	
<ul style="list-style-type: none"> <li>Create a practical mission statement for the project with Sponsor, property/housing management and service partners.</li> </ul>	6 months	
<ul style="list-style-type: none"> <li>Amend support service plan, as necessary, given each service partner’s philosophy, mission statement, tenant profile requirements, etc.</li> </ul>	5 months	
<ul style="list-style-type: none"> <li>Begin to negotiate agreements (e.g., letter of interest/MOUs) with service partners.</li> <li>Begin to negotiate policy for tenant hiring with services and property management (i.e., agreement that all job postings from property management are first given to the services/vocational staff to circulate internally, develop internal tenant hiring goals such as 25% of staff will be tenants or former tenants, etc.).</li> </ul>	4 - 5 months	

<ul style="list-style-type: none"> <li>• Determine staffing plan, including supervision and administrative support.</li> <li>• Begin planning for a supportive employment environment within services and property management (i.e., hiring and retention services available through services team for on-site employment, how the tenant/employee relationships will be managed to support the tenant’s housing and employment goals).</li> <li>• Solicit tenants’/potential tenants’ help with rent-up and gaining community support.</li> </ul>	4 months
<ul style="list-style-type: none"> <li>• Identify potential tenant and consumer staffing in services and property management (refer to staffing plan to identify services opportunities).</li> </ul>	4 months
<ul style="list-style-type: none"> <li>• Determine whether services plan will require modifications to property management plans (e.g., staffing, tenant selection).</li> </ul>	4 months

<b>Begin Support Service Plan Implementation</b>	<b>Time prior to start of rent up...</b>
<ul style="list-style-type: none"> <li>• Write final version of service plan and budget.</li> </ul>	3 months
<ul style="list-style-type: none"> <li>• Finalize agreements (e.g., letter of interest/MOUs) with service partners.</li> <li>• Finalize tenant hiring policy and supportive employment plan.</li> </ul>	3 months
<ul style="list-style-type: none"> <li>• Issue job announcements.</li> </ul>	2 months
<ul style="list-style-type: none"> <li>• Hire key staff, including key tenant positions.</li> </ul>	1.5 months
<ul style="list-style-type: none"> <li>• Begin working out protocols for rent-up and operations with property/housing management staff.</li> </ul>	1 month

<b>Occupancy-/Post-Occupancy-Related Activities</b>	<b>Time prior to end of construction...</b>
<ul style="list-style-type: none"> <li>• Begin tenant rent-up.</li> </ul>	1 month
<ul style="list-style-type: none"> <li>• Hire additional support staff as needed, including tenant positions.</li> </ul>	1 month
<ul style="list-style-type: none"> <li>• Establish supportive housing project team meeting schedule.</li> </ul>	1 month
<ul style="list-style-type: none"> <li>• Conduct team building/cross-training among service and property/housing management staff, including tenant employee retention services.</li> </ul>	Ongoing