

Resident Opportunity and Self-Sufficiency (ROSS)

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**Resident Opportunity
&
Self-Sufficiency**





Surveys

You'll receive a link to an online survey in the email with your certificate of completion

The survey should take 5 minutes or less

We'd really appreciate your feedback



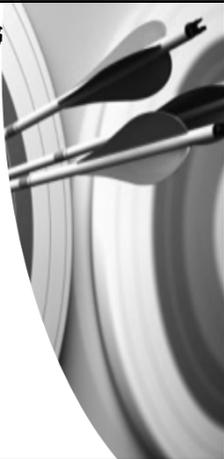
Learning Outcomes

- Know starting ROSS-SC program
- Establish trust with PHA, residents, service partners
- Assess PHA, ROSS clients, ROSS program, and community needs
- Describe best practices in measuring ROSS success
- Understand collaboration and team building in community partnerships



What ROSS NMA Class Does Cover

- ROSS regulations
- ROSS goals
- ROSS environment
- ROSS best practices



What ROSS NMA Class Doesn't Cover

- How to Use PHA CM Software
- How to Use HUDs Standards for Success
- Whether PH families may co-enroll in ROSS and FSS





Materials and References

Section 1

NMA Reference Materials

- NMA
 - ROSS Power Points
 - ROSS Coordinator Plan
 - ROSS Service Design
 - Sample forms



HUD References

- ROSS NOFO
 - ROSS HUD Exchange
- Standards for Success
- PIH 2015-12 Community Service
- FSS 24 CFR 984
- FSS Contract of Participation



HUD References

- ROSS HUD Exchange
 - ROSS Webinars
 - ROSS FAQs
 - Running ROSS Step by Step
 - ROSS Resources
- More Than a Roof and Walls



HUD References

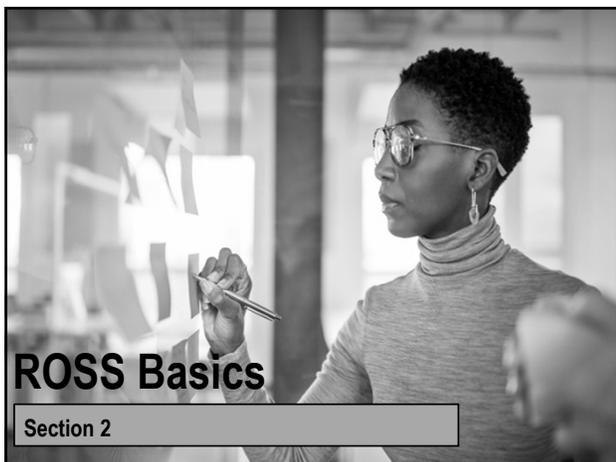
- ROSS HUD Exchange
 - ROSS Data Guide 4.0 Webinar
 - ROSS-SC Data Quick Reference Guide
 - ROSS Dashboard
- Removed from ROSS HUD Exchange for Review
 - ROSS Data Guide 4.0
 - ROSS Data Elements 4.0



PHA References

- PHAs grant application
- PHAs grant agreement
- ROSS Policy Plan
 - Not Required
- FSS Action Plan





ROSS Basics

Section 2

Goal of ROSS Program

- Match Housing Families with
- Services and Activities To Achieve
- Economic or Housing Self Sufficiency



Goal of ROSS Program

- Services should assist families to make progress toward self-sufficiency
 - Economic self-sufficiency is progress towards living wage job
 - Housing self-sufficiency is living longer in their home
 - Aging in place



Goal of ROSS Program

- Place based services assist families to make progress toward self-sufficiency
 - By removing barriers in
 - Education
 - Employment
 - Health
 - Finances
 - To achieve economic and housing stability



Goal of ROSS Program

- Place based services allow elderly or persons with disabilities to...
 - Improve living conditions
 - Maintain independent living
 - Age-in-place
 - Avoid placement in full-care facility



ROSS Definitions

- Self-Sufficiency
- Area of Need
- Core function = Activities
- Community Needs Assessment
- Participant Needs Assessment
- Participant



ROSS Definitions

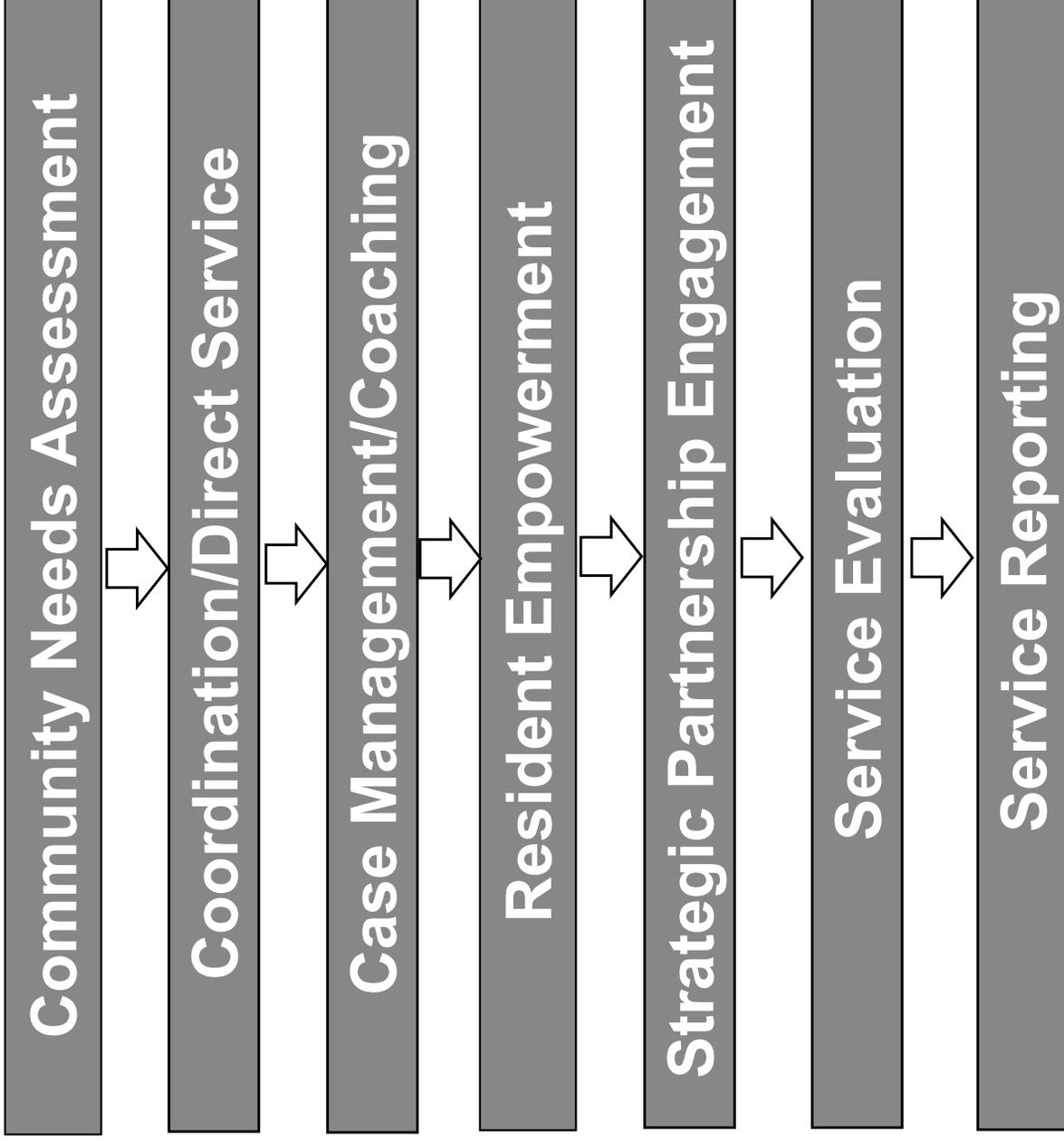
- Service Design
 - Direct Service
 - Indirect (Administrative) Service
- Outputs = # expected/completing activities
- Outcomes = Positive changes over time
 - From activities
- Key Indicator = Measurement



ROSS Definitions



Core Functions Ross Program



Steps in Ross Program

Do Community Needs Assessment

Write Grant Application

Identify Area of Need

Determine Area of Need Goals

Getting Started

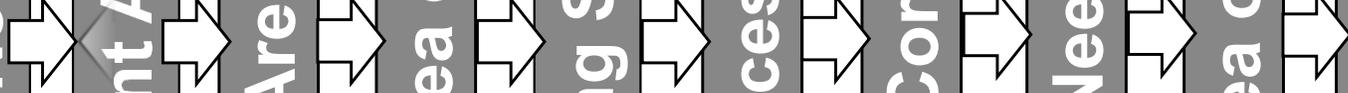
Design Services and Policies

Complete Core Functions

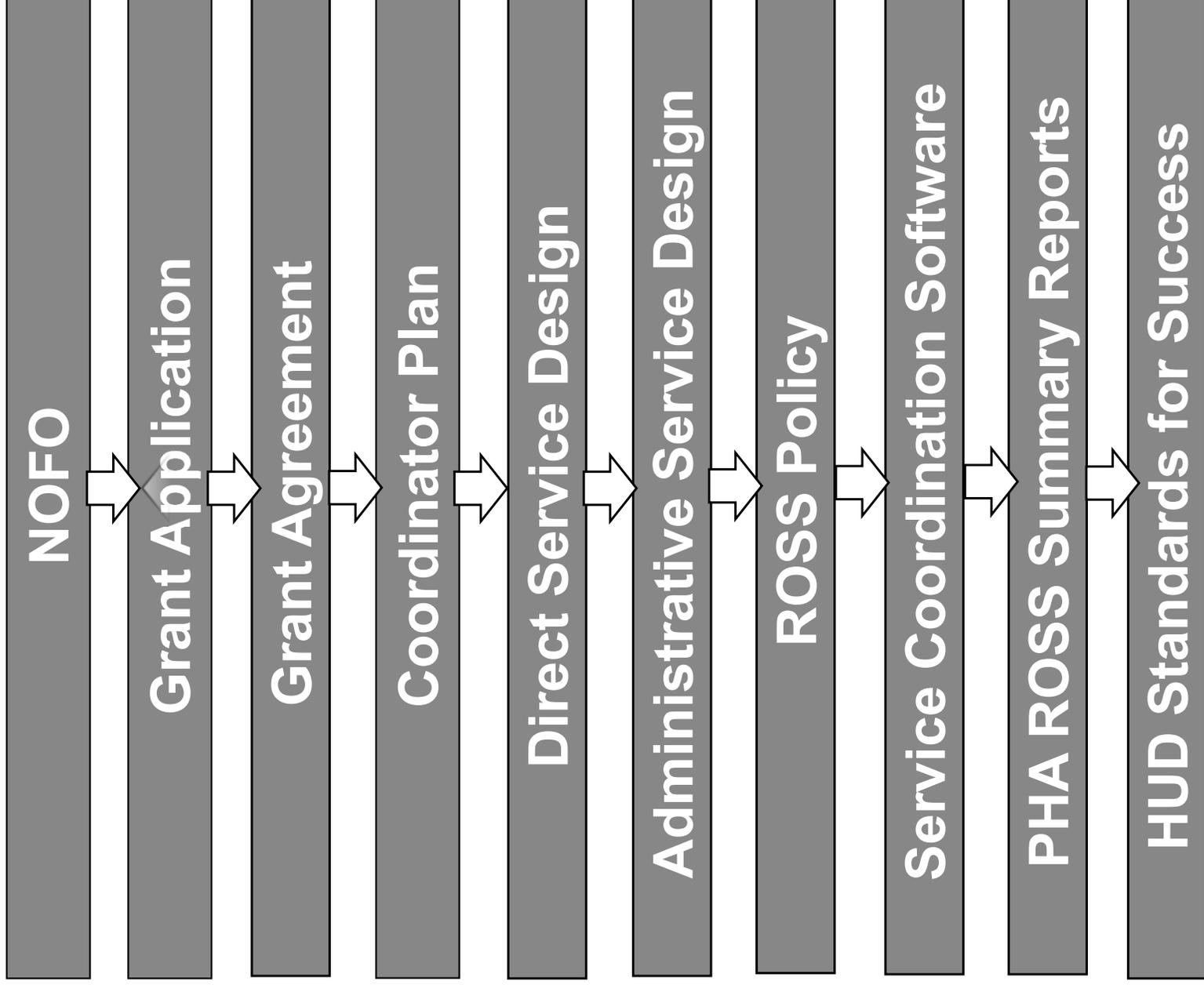
Identify Area of Need Indicators KPIs

Measure Area of Need KPIs

Evaluate, Report, Redesign



Key Docs in Ross Program



Comparison Grant Requirements 2023-2025

Core Functions of Coordinator

	2023	2024	2025
Direct Service	<ul style="list-style-type: none"> Community Needs Assessment Coordination and Direct Service Case Management and Coaching Resident Engagement Evaluation and Reporting 	<ul style="list-style-type: none"> Community Needs Assessment Coordination and Direct Service Delivery Case Management and Coaching Resident Leadership Development Resident Engagement Evaluation and Reporting 	<ul style="list-style-type: none"> Community Needs Assessment Coordination of Direct Service Case Management and Coaching Resident Empowerment Strategic Partnership Engagement Reporting and Evaluation
Administrative Service	<ul style="list-style-type: none"> Service Monitoring Evaluation 	<ul style="list-style-type: none"> Service Monitoring Grant Monitoring 	<ul style="list-style-type: none"> Service Monitoring Grant Monitoring

Core Functions in ROSS Program

- **Community Needs Assessment**
 - Assess needs of residents in community for critical needs to achieve self-sufficiency
- **Coordination**
 - Coordinate with service providers to link residents to services and bring services onsite
 - Direct Services
- **Case Management/Coaching**
 - Intake, assessment, goal setting, education, referrals, and monitoring

Core Functions in ROSS Program

- **Resident Leadership Development**
 - Build resident capacity as partners in improving housing community
- **Resident Engagement**
 - Recruit and retain residents in ROSS
- **Reporting**
 - Summarizing participant activities and outcomes
- **Evaluation**
 - Monitor progress and success of ROSS program

**Minimum Qualifications
Service Coordinator**

- **Bachelor's degree in social work preferable**
 - Other degrees acceptable
 - May consider individuals who have significant relevant work experience
- **Knowledge of entitlement programs**
- **Knowledge of aging process and disability services**



**Minimum Qualifications
Service Coordinator**

- 2-3 experience in social services for low-income
 - Demonstrated knowledge of supportive services
 - Demonstrated ability to advocate for low income families, communicate effectively
 - Demonstrated ability to communicate
 - With all clientele



Learning Activity 1

- What is the goal of your ROSS program?
 - What positive changes will happen over time
 - For residents
 - For PHA
 - As a result of ROSS program?
- Plan to revisit later...



2 ROSS Service Design Model thru Outcomes Blank

HUD/PHA Goals	Inputs	Area of Need	Activities <small>(Core Functions)</small>	Outputs		Outcomes	Outcomes
What are HUD/PHA Trying to Accomplish	What Resources are We Using	Community Needs Assessment	What are We Doing to Accomplish This	How Many Activities Do We Do	How Many Participations in Each Activity	Immediate Positive Change in Belief	Short Term Positive Change in Behavior
						Long Term Positive Change in Status/Situation	

Header							
Economic Self-Suff							
Econ Self Suff							
Housing Self-Suff							
Age In Place							
Footer							Service Design



▪ The Families We Serve



The Families We Serve



- SC serve families, elderly residents, or a mix of both
- HUD encourages outreach to single parent heads-of-households



Dispelling Myths

- Elderly/persons with disabilities are like children - unable to make good decisions
- Poor people are to blame for their poverty
- Poor and elderly people are unhealthy
- All are dependent on gov't agencies
- Housing staff don't understand residents
- Service coordinators understand residents better



Using Real Data Answering Real Questions

- All of these characteristics are in all populations in same number
- Must look at individuals individually
- Using real data help service providers work through these and other myths
 - (Training, experience, and data)



Learning Activity 2

- Small group
 - Each describe myths that are at work in PHA
 - Describe how myth effects work, you, and residents
 - Share with group what you might do about it



Service Coordinator

- Is vital part of management team
- Creates link between PHA and community
- Creates community
- Increases income and quality of life
- Reduces costs to resident, PHA, community



Direct Supportive Services



- Should be broad and responsive
 - Families in housing benefit from a number of services at same time
 - Service coordinators must follow up to make sure partner provided service
 - More later...



Direct Supportive Services

- Stabilize
 - Lease
 - Health (inc risk)
 - Kids
 - Money and benefits
 - Quality of life
- Educate
 - Life skills, basic skills, job skills
- Develop career and long-term SS



Families
Direct Supportive Services

- Nutrition
- Life-Skills training
- Parenting
- Clothing
- Transportation
- After-school
- Summer school
- Early childhood Ed
- Job placement
- Career advancement planning
- Long-Term education and training
- Resident business development

Elderly Disabled
Direct Supportive Services

- Services for elderly or disabled residents to age-in-place
 - Disability Services
 - Wellness Programs
 - Resident Organization
 - Community Safety
 - Civic Engagement Resources



- Skills assessment
- Job search assistance
- Digital literacy/computer skills
- Résumé writing and interviewing techniques



- Accessible transportation services
- Assistance with daily living
- Disability services counseling



- Health care referrals
- Nutrition education
- Referrals to drug and alcohol abuse treatment programs



- Benefits enrollment
- Child care
- English as a second language
- Executive functioning and life skills



Families

Elderly and Disabled



- After-school programs
- Early childhood education
- Tutoring



- Financial coaching
- Long-term financial planning
- Money management



- Healthcare coordination
- Meal services
- Transportation services

Note Handout

Supportive Service References

- The Community Tool Box
 - <https://ctb.ku.edu/en/table-of-contents>
- HUD Training
 - <https://www.hudexchange.info/programs/ross/guide/introduction/>





ROSS Grant Requirements

Section 3

Public Housing Grants

- 1937 Affordable Housing Act
 - First national program
- 1969 Brooke Amendment
 - Set rent at percent of income
- Bricks and Mortar
 - Housing assistance should provide housing
 - Not social services-other agencies do that!
- Rents are low – needs are high – no services
- Funded by grants



Public Housing Grants

- Service Coordinator
- Drug Elimination
- Economic Development & Support Services
- Hope VI
- ROSS
- Choice Neighborhoods
- Jobs Plus
- EnVision Centers



ROSS Grant Requirements



- ROSS possible through funding from HUD
- Notice of Funding Opportunity**
- Available every year for 3-year program
 - Past recipients may apply every 3 years



Steps in Ross Program



ROSS Grant Requirements

- FY 2025 Ross NOFA
 - ROSS Handout is 2023 thru 2025
- HUD Broadcast 2025

INFORMATIONAL BROADCAST
FOR THE FISCAL YEAR 2024
NOTICE OF FUNDING OPPORTUNITY FOR THE
RESIDENT OPPORTUNITY & SELF-SUFFICIENCY
SERVICE COORDINATOR GRANT PROGRAM

ROSS-PIH@hud.gov



ROSS Grant Requirements

- Funding
- Coordinators
- Match
- Guarantees
- Unit served
- Eligible activities
- Eligible cost
- Eligible participants
- Community Assessment
- Area of need



Comparison Grant Requirements 2023-2025

Funding-Coordinator-Match

	2023	2024	2025
Funding To get the new form, please send an email to ROSS-PIH@hud.gov.	\$40 million for SC \$80,000 SC salary 10% grant Admin fees \$2,500 Training per SC \$272,250 to \$816,750	\$40 million for SC \$90,000 SC salary (BLS) 10% grant Admin fees \$2,500 Training per SC \$246,000 to \$737,550	\$40 million for SC \$90,000 SC salary 10% grant Admin fees \$2,500 Training per SC \$0 to \$816,750
Number Coordinators	3-year funding 3 SC per size/type PHA *Based on Occupied Units Plus 1 if Eld/Dis	3-year funding 3 SC per size/type PHA *Based on Occupied Units Plus 1 if Eld/Dis	3-year funding 3 SC per size/type PHA *Based on Occupied Units Plus 1 if Eld/Dis
Match	Required 25% match	Required 25% match	Required 25% match

**ROSS Grant Requirements
Changes in 2025**

- **Coordinator Salary/Fringe**
 - HUD decision using BLS data
 - Social Work - other
 - Plus 30% for benefits
 - Included in BSL salary
 - Must have 3 salary comps if need more
 - Salary may be more than 10% higher than average comps
- **New ROSS Applications Review definitions and ratings**



Number Of Service Coordinators

- **PHAs may apply for up to 3 SCs**
 - Based on number of occupied units* in PH
 - 50-1000 units = 1 SC
 - 1001-2500 units = 2 SCs
 - 2501+ units = 3 SCs
 - May apply for one additional SC if serving E/D in large numbers (no more than 3)
 - *Remember
 - Total occupied units plus ED
 - Not more than 3

Match Requirement

- **25% of requested funds**
 - Cash or in-kind
 - Might be costs of services provided in ROSS-SC
- **Precise and in writing showing total dollar value**
 - Must be tracked
 - Sample in booklet
 - Must reflect needs assessment - See NOFA



ROSS Grant Requirements

2023-2025

Grantees-Units Served-Eligible Activities

Category	Before 2023	2024	2025
Grant Agreement	PHAs, Tribes, RAS, NPOs EDSC and ROSS in projects	PHAs, Tribes, RAS, NPOs EDSC and ROSS in project One additional SC if large number E/D in project – no more than 3	PHAs, Tribes, RAS, NPOs, EDSC and ROSS in project One additional SC if large number E/D in project – no more than 3
Eligible Participants	Public Housing (CPH)	Public Housing (CPH)	Public Housing (CPH)
Participants Served	50 units within 6 months then always	50 units per SC at all times	50 units per SC at all times
Eligible Activities	Salary/Benefits Training/Transportation Administrative Costs, <u>and</u> Direct services plus contractors	Salary/Benefits Training/Transportation Administrative Costs, <u>and/or</u> Direct services plus contractors	Salary/Benefits Training/Transportation Administrative Costs, <u>and/or</u> Direct services plus contractors

**Eligible Grantees
Before 2022**

- Grantees may be
 - Public housing agencies (PHAs),
 - Tribes
 - Resident Associations (Incorporated non-Profit)
- EDSC applying for families only
 - If apply for elderly ROSS may NOT receive EDSC in future
- Contract Administrators



**Eligible Grantees
After 2022**

- Grantees may be
 - Public housing agencies (PHAs),
 - Tribes
 - Resident Associations (Incorporated non-Profit)
- EDSC PHAs may also apply for project
- Contract Administrators



Units Served Per Coordinator

- Before 2022
 - Must serve at least 50 units
 - Within grant period
 - For full points on grant application
 - Average between 50 - 400 residents
- After 2022
 - Must serve 50 per coordinator
 - At any given time
 - For full points in grant application



Changes in ROSS 2024/25

- SC or subcontractor may provide direct services
- Eligible applicants
 - Prior ROSS grantees
 - PHA, MF RAD, PBV/RAD, PBRA
- Ineligible applicants
 - Unexpended balance of 60%
 - Duplicate applications
 - Current ROSS grantees
 - Don't meet eligibility requirements



Eligible Participants

- All persons assisted by ROSS SC in development must be residents of...
 - Conventional public housing or
 - NAHASDA-assisted housing
 - PHA or MF RAD PBV or RAD PBRA
 - If previous ROSS
- No HCV, no tax credit, no Non ROSS RAD, PBV/PBRA



Eligible Participants

- Family
 - Anyone allowed to live in unit except Live-in Aide and family
- Elderly
 - Anyone at least 62 years of age
- Person with disabilities
 - HUD/Social Security definition NOT ADA



Eligible Participants

- A ROSS participant is
 - Eligible resident completed individual ROSS intake assessment
 - Is actively participating in ROSS program
- A non-participant is
 - Eligible resident that participated in service/activity coordinated by ROSS-SC
 - Has not completed an intake assessment



Eligible Participants

- An active ROSS participant's

"... needs assessment serves as a starting point from which the Service Coordinator and client can together develop a comprehensive Individual Training and Services Plan (ITSP)"
ROSS Training On-Line training



- Safe Harbor



Eligible Activities Costs



- Eligible ROSS program costs include
 - Coordinator salary and benefits
 - Training and travel expense
 - Must be preapproved by HUD Field Office
 - Administrative costs

Grant Requirement

2023-2025

Eligible Activities Costs

2023	2024	2025
<p>Salaries and benefits Training and travel</p> <p>Administrative costs</p> <p>ROSS administrative costs</p> <p><u>Includes range of cost of direct services to participants</u> *HUD <u>Field Office</u> Approval</p>	<p>Salaries and benefits and/or Training and travel</p> <p>Administrative costs and/or</p> <p>ROSS administrative costs</p> <p><u>Includes range of cost of direct services to participants</u> *HUD <u>Field Office</u> Approval</p>	<p>Salaries and benefits and/or Training and travel</p> <p>Administrative costs and/or</p> <p>ROSS administrative costs</p> <p><u>Includes range of cost of direct services to participants</u> *HUD <u>Headquarters</u> Approval</p>

**Eligible Administrative Costs
2023 to Present Include**

- **Direct Service Expenses**
 - Child Care
 - Adult Basic
 - Education/Literacy
 - After-school Programming
 - High School/GED Programs
 - Programs to assist complete the FAFSA
 - And...



**Eligible Administrative Costs
2023 to Present Include**

- **Direct Services Expenses**
 - Job Training and Skills/Employer Linkage
 - Digital Inclusion Activities
 - Credit Counseling/Financial
 - Healthcare Services
 - Assistance with ADL for e/d



Eligible Administrative Costs

- **Administrative Expenses**
 - Administrative salaries
 - Auditing fees
 - Management fee
 - Advertising/marketing
 - Employee benefits
 - Office expenses
 - Legal expense
 - Travel
- Office of Public and Indian Housing, Real Estate Assessment Center
Financial Assessment Subsystem – Public Housing (FASS-PH)
Financial Data Schedule Line Definition Guide July 2020

Eligible Administrative Costs

- Administrative Cost Amount equals
 - \$210,000 salary/fringe amount
 - + \$7500 total training cost
 - = \$217,500 total salary/fringe amount plus total training cost (10% Admin = \$21,750)
 - + \$21,750
 - = \$239,250



Steps in Ross Program



Community Needs Assessment

- HUD requires ROSS programs to
 - Conduct a Community Needs Assessment before applying for grant
 - Outreach 100%
 - Results a least 20%

SAMPLE COMMUNITY NEEDS ASSESSMENT SURVEY FOR THE ROSS SERVICE COORDINATOR PROGRAM

Part I: Household Information:

1. Are you an adult 18 years or older? (circle one)

Yes	No
-----	----

2. Are you the head of household? (circle one)

Yes	No
-----	----

3. Does anyone in your household have a mental or physical disability? (circle one)

Yes	No
-----	----

Part II: Community/Household Needs:

4. How would you rate the following issues for your household?

Issue	Serious Problem	Moderate Problem	Not a Problem	Does Not Apply to My Household
Availability of job training opportunities				
Availability of jobs for adults				
Availability of jobs for youth				
Education				
Availability of child-care services				
Lack of computer/digital literacy				
Cost of living				
Income/wages				
Debt				
Financial security				
Availability of financial services				
Availability of financial counseling				
Elderly living assistance (62+)				
Physical health				
Mental health				

Seeking employment with a criminal record				
Obtaining a degree/diploma with a criminal record				
Availability of substance abuse services				
Need for substance abuse treatment				

5. What are the things that make it difficult for you or other adults in your household to find and/or keep work? (check all that apply)

BARRIER	Check All that Apply
Nothing	
Need affordable childcare	
Caring for a family member who is sick or disabled	
Do not speak English well	
Need computer training	
Need transportation	
Need job experience	
Need job training	
No job opportunities	
Do not have a high school diploma/GED	
Do not have a college degree	
Disability	
Criminal record	
Lack of transportation	
Other – specify	
Other – specify	
Other – specify	
Don't know	
No response	

6. Do you or others in your household have interest in the following? (check all that apply)

INTEREST	Check All that Apply
GED/Adult education	
Vocational training	
Increasing income	
Getting a job	
Getting a better job	
Computer training	
Saving money	
Eliminating debt	
2-year college	

4-year college	
Trade school	
Other (specify)	
Other - specify	
Don't know	
None	
No response	

7. Do you or another adult in your household have difficulty with any of the following? (check all that apply)

SUBJECT/SKILL	Check All that Apply
Reading	
Math	
Writing	
Speaking English	
Writing English	
Using a computer	
Other – specify	
Other – specify	
Other – specify	
Don't know	
None	
No response	

8. What are the primary health care needs of your household? (check all that apply)

HEALTHCARE NEEDS	Check All that Apply
Primary health care	
Pediatric (child) care	
Prenatal (pregnancy) care	
Dental care	
Healthcare education/prevention	
Nutrition and exercise programs	
Services to help alleviate stress/anxiety/depression	
Assistance with daily living for elderly/disabled residents	
Health screening services	
Substance abuse treatment	
Smoking cessation programs	
Drinking cessation programs	
Transportation to healthcare services	
Other – specify	
Other – specify	
Other – specify	
Don't know	
None	

No response	
-------------	--

9. What is your gender? (check one)

GENDER	Check One
Identifies as female	
Identifies as male	
Other	

10. What is your age (check range)

AGE RANGE	Check One
18-24	
25-34	
35-44	
45-54	
55-65	
65 or older	
No response	

Grant Requirement 2023-2025

Areas of Need

2023	2024	2025
<p>PHA chooses Area of Need from a range provided by HUD</p> <p>Choose from “Area of Need”</p> <ul style="list-style-type: none"> Digital Inclusion Education Employment Financial Literacy Elderly/Disabled Substance Abuse Health and Wellness Re-entry <p>[Digital Inclusion (added 2021)]</p> <p>Must match community needs assessment</p>	<p>PHA chooses Area of Need from a range provided by HUD</p> <p>Choose from “Area of Need”</p> <ul style="list-style-type: none"> Education Employment Financial Literacy Elderly/Disabled Substance Abuse Health and Wellness Re-entry Digital Inclusion <p>One of these</p> <p>If choose one of these - must choose</p> <p>Must match community needs assessment</p>	<p>PHA chooses Area of Need from a range provided by HUD</p> <p>Choose from “Area of Need”</p> <ul style="list-style-type: none"> Education Employment Financial Literacy Elderly/Disabled Substance Abuse Health and Wellness Re-entry Digital Inclusion <p>One of these</p> <p>If choose one of these - must choose</p> <p>Must match community needs assessment</p>

Areas of Need

- Choose from "Area of Need"
 - Education
 - Employment
 - Financial Literacy
 - Elderly/Disabled
 - Substance Abuse
 - Health and Wellness
 - Re-entry
 - Digital Inclusion

} One of these

} If choose one of these - must choose



Areas of Need

- Choose from "Area of Need"
 - Education
 - Employment
 - Financial Literacy
 - Elderly/Disabled
 - Substance Abuse
 - Health and Wellness
 - Re-entry
 - Digital Inclusion

} Nothing allows ROSS to exclude elderly, disabled or family participants

Other Grant Requirements

- NOFO also requires compliance with all Fair Housing requirements




Fair Housing

- **Compliance with Fair Housing**
 - Participant training on rights
 - How to file complaint
 - Information on high income neighborhoods
 - Coordinators seek training on Fair Housing



Other Regulatory Requirements

- **Section 3**
- **Limited English Proficiency**
- **Reasonable Accommodation**



Resident Opportunities and Self-Sufficiency (ROSS) Grant Program
Office of Public and Indian Housing

Running ROSS Step-by-Step

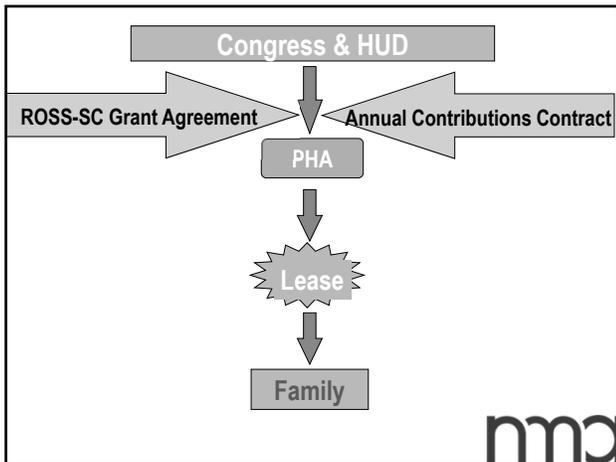


<https://www.hudexchange.info/programs/ross/guide/introduction/>



ROSS The Setting

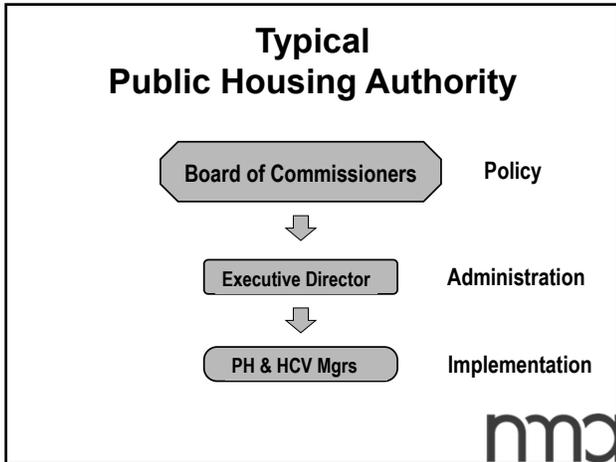
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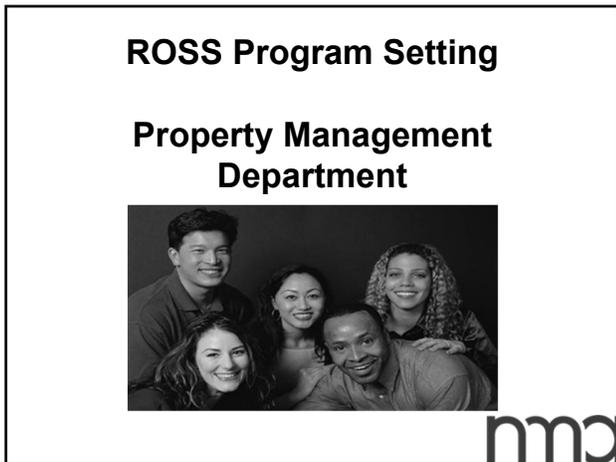


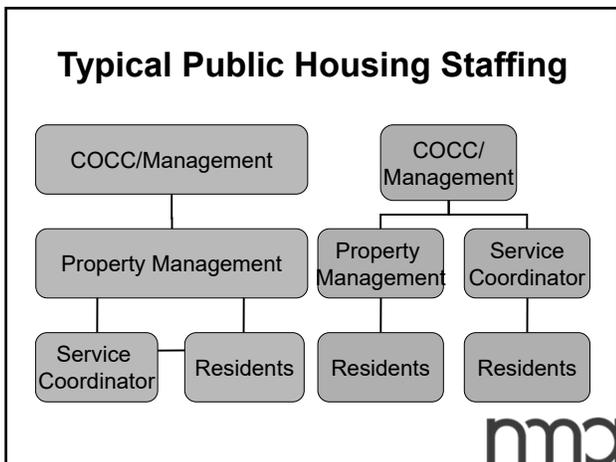
Public Housing

- Public housing is project-based subsidy
 - Families have to live in the unit which has subsidy attached to it





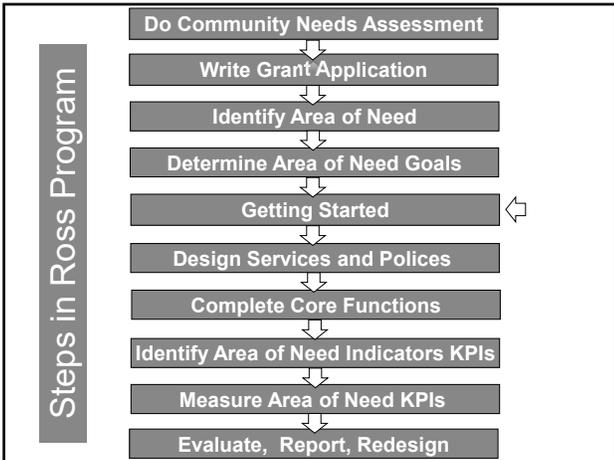






Getting ROSS Started

Section 5



Getting ROSS Started

- Let's take a look at a work plan to guide your efforts



Activity	Wk 1	Wk 2	Wk 3	Wk 4	Wk 5	Wk 6	Wk 7	Wk 8	Wk 9	Wk 10	Wk 12
Review Key Docs Identify PHA ROSS Program Goal											
Shadow Property Manager Program Needs Assessment Identify Community Service Providers											
Meet with Residents											
Meet with Community Service Providers Design Administrative Program & Documents Design Service Delivery Program & Documents											
Develop Resource Directory											
Program Coordinating Committee Meeting											
Begin Service Delivery											

Getting Ross Started

- **Week 1-3**
 - Review key documents
 - Identify PHA and ROSS goal
 - Shadow property manager
 - Complete program needs assessment
 - Identify community service providers
 - Meet with Residents



Getting Ross Started

- **Week 4-7**
 - Meet with community providers
 - Design service program and documents
 - Design admin program and documents
 - Write ROSS policy
 - Develop resource directory
 - Meet with PCC



Getting Ross Started

- **Week 8-12**
 - Begin service delivery
 - Prepare detailed one-year work plan



Getting Ross Started

- Week 1-3
 - Review key documents
 - Identify PHA and ROSS goal
 - Shadow property manager
 - Complete program needs assessment
 - Identify community service providers
 - Meet with Residents



Review Key Documents

- Consolidated Plan
- Agency Plan
- Annual Plan
- Admissions & Continued Occupancy Plan
- NOFO
- Grant application
- Evaluation
- Grant Agreement
- AASC Ethics
- This Booklet...



Getting Ross Started

- Week 1-3
 - Review key documents
 - Identify PHA and ROSS goal
 - Shadow property manager
 - Complete program needs assessment
 - Identify community service providers
 - Meet with Residents



Identify PHA ROSS Program Goal

- Meet with agency management
- Ask...
 - "What do you want this program to accomplish?"
- Compare agency goal to HUD goal
 - Economic self-sufficiency
 - Housing self-sufficiency



Remember ROSS Goals

Clarify exactly agency goals in comparison to HUD goals



2 ROSS Service Design Model thru Outcomes Blank

HUD/PHA Goals	Inputs	Area of Need	Activities (Core Functions)	Outputs		Outcomes	Outcomes
What are HUD/PHA Trying to Accomplish	What Resources are We Using	Community Needs Assessment	What are We Doing to Accomplish This	How Many Activities Do We Do	How Many Participations in Each Activity	Immediate Positive Change in Belief	Short Term Positive Change in Behavior
							Long Term Positive Change in Status/Situation

Header							
Economic Self-Suff							
Econ Self Suff							
Housing Self-Suff							
Age In Place							
Footer							

Service Design

Getting Ross Started

- Week 1-3
 - Review key documents
 - Identify PHA and ROSS goal
 - Shadow property manager
 - Complete program needs assessment
 - Identify community service providers
 - Meet with Residents



Shadow Property Manager

- Learn
 - How they do what they do
 - Why they do what they do
- Listen to their POV
- Stay by their side



Getting Ross Started

- Week 1-3
 - Review key documents
 - Identify PHA and ROSS goal
 - Shadow property manager
 - Complete program needs assessment
 - Resident Survey is one part
 - Identify community service providers
 - Meet with Residents



Program Needs Assessment

- With Whom
 - Property Manager
 - Other agency staff
 - Residents
 - Service Provider – Staff
 - Service Provider-Management
 - Other Community Members



Program Needs Assessment

- Find out their POV...
 - What are current concerns
 - What's working
 - What's not working
 - What are resident's strengths
 - What are resident's challenges
 - What residents need what and in...
 - What numbers



Remember ROSS Goals

Help to understand each department's goals in comparison to agency and HUD goals



Getting Ross Started

- **Week 1-3**
 - Review key documents
 - Identify PHA and ROSS goal
 - Shadow property manager
 - Complete program needs assessment
 - Identify community service providers
 - Meet with Residents



Identify Community Service Providers

- Look at Community Needs Assessments
- Get resource directory-United Way & City
- Look at support services
- Look at Evaluation activities in S4S
- Make a list of possible agencies and contacts



Getting Ross Started

- **Week 1-3**
 - Review key documents
 - Identify PHA and ROSS goal
 - Shadow property manager
 - Complete program needs assessment
 - Identify community service providers
 - Meet with Residents



Meet with Residents

- Set time & date & place with property manager
- Develop outreach
- Arrange food, activities, agenda
 - “We have \$250,00 to \$740,000 in service coordination plus about 10% of that to spend”
 - What’s needed?



General Resident Needs Assessment

- Find out...
 - What are current concerns
 - What’s working
 - What’s not working
 - What are resident’s strengths
 - What are resident’s challenges
 - What residents need what and in...
 - What numbers



Getting Ross Started

- Week 4-7
 - Meet with community providers
 - Design service program and documents
 - Design admin program and documents
 - Write ROSS policy
 - Develop resource directory
 - Meet with PCC



Getting Ross Started

- Week 4-7
 - Meet with community providers
 - Design admin program and documents
 - Design service program and documents
 - Write ROSS policy
 - Develop resource directory
 - Meet with PCC



Meet with Community Service Providers



- Work with management
- Call each – set apt
- Take ROSS program info
- Identify service goals in common
- Identify services to exchange
- Discuss PCC



Community Partner's Assessment

- Find out...
 - What are current concerns
 - What's working
 - What's not working
 - What are resident's strengths
 - What are resident's challenges
 - What residents need what and in...
 - What numbers



Getting Ross Started

- Week 4-7
 - Meet with community providers
 - Design service program and documents
 - Design admin program and documents
 - Write ROSS policy
 - Develop resource directory
 - Meet with PCC

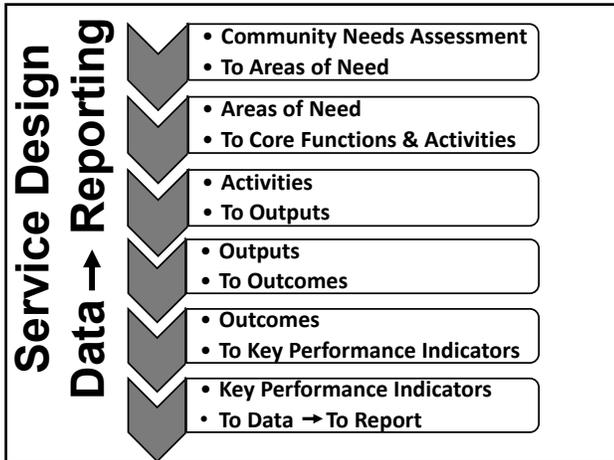


Steps in Ross Program



Service Design

- Good programs measure success by data on an agency's
 - Goals
 - Resources
 - Activities – outputs
 - Results – outcomes
 - How measured
 - How reported
- Also shows measurement or evaluation...



Service Design

- One way to capture this is with the Service Design
 - Service Design is picture of a program
 - Explains purpose and impact in single
 - Viewer “sees” how priorities relate to activities and results

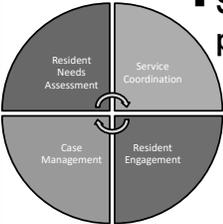


2 ROSS Service Design Model thru Outcomes Blank

HUOPRA Goals	Inputs	Area of Need	Activities (and Review)	Outputs	Outcomes	Outcomes	Outcomes	
What are HUOPRA Trying to Accomplish?	What Resources are We Using?	Community Needs Assessment	What are We Doing to Accomplish This?	How Many Activities Do We Do?	How Many Participants in Each Activity?	Immediate Positive Change in Belief?	Short Term Positive Change in Behavior?	Long Term Positive Change in Nature/Situation?
Header								
Economic Self-Suff								
Econ Self Suff								
Housing Self-Suff								
Age in Place								

Service Design

Service Design

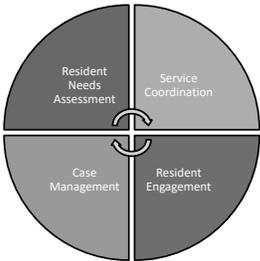


- Service Design is picture of a program
- Explains purpose and impact in single page
- Viewer “sees” how goals relate to activities and results

nma

Service Design

- Service designs show “what causes what”
- Service designs show why program is a good solution to a problem



nma

Service Design

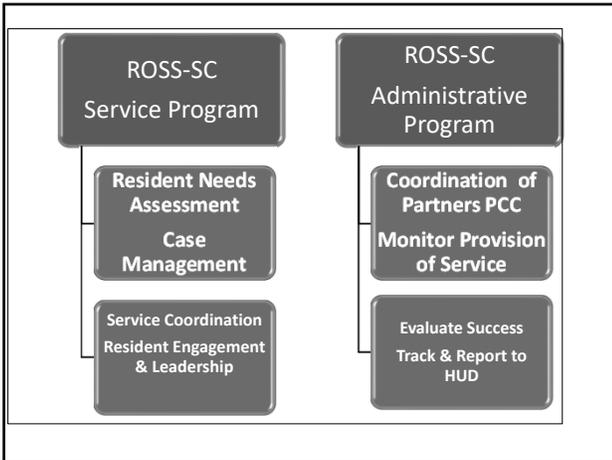
- Benefits of designing Service Design are far reaching
 - Common language
 - Reference point for everyone
 - Basis for performance evaluation

nma

Service Design

- Two parts to any program
 - Direct Service
 - Administrative Service
- Both need to be designed
 - Describe steps – create paperwork
 - Big isn't important-CLEAR is important





Learning Activity 5

- Individually w Service Design
 - Write in HUDs Goal
 - Re-do PHAs goal for ROSS
- Brainstorm and jot down
 - All activities you have been doing in ROSS



2 ROSS Service Design Model thru Outcomes Blank

HUD/PHA Goals	Inputs	Area of Need	Activities <small>(Core Functions)</small>	Outputs		Outcomes	Outcomes
	What Resources are We Using	Community Needs Assessment	What are We Doing to Accomplish This	How Many Activities Do We Do	How Many Participations in Each Activity	Immediate Positive Change in Belief	Short Term Positive Change in Behavior
						Long Term Positive Change in Status/Situation	

Header

List Your Activities

Economic Self-Suff

Econ Self Suff

Housing Self-Suff

Age In Place

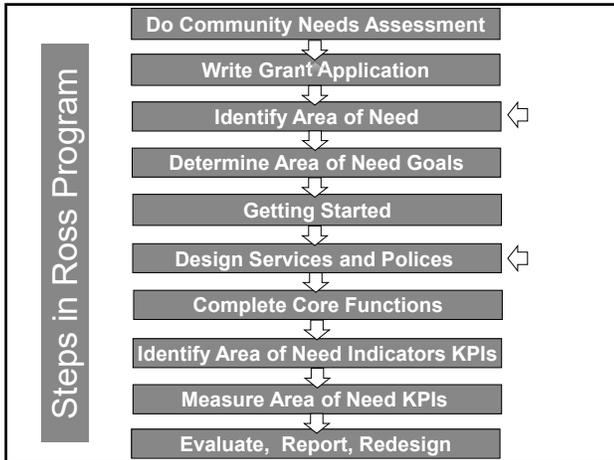
Service Design

2 ROSS Service Design Model thru Outcomes Blank

HUD/PHA Goals	Inputs	Area of Need	Activities (Core Functions)	Outputs		Outcomes	Outcomes	Outcomes
				How Many Activities Do We Do	How Many Participations in Each Activity			
What are HUD/PHA Trying to Accomplish	What Resources are We Using	Community Needs Assessment	What are We Doing to Accomplish This			Immediate Positive Change in Belief	Short Term Positive Change in Behavior	Long Term Positive Change in Status/Situation
Economic Self-Suff			Comm Needs Assess					
Econ Self Suff			Case Management					
			Coord Direct Service					
Housing Self-Suff								
Age In Place								
			Resident Empowerment					Service Design

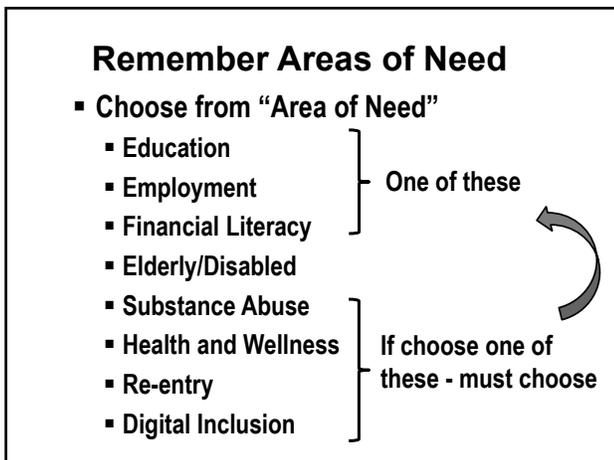
2 ROSS Service Design Model thru Outcomes Blank

HUD/PHA Goals	Inputs	Area of Need	Activities (Core Functions)	Outputs		Outcomes	Outcomes	Outcomes
				How Many Activities Do We Do	How Many Participations in Each Activity			
What are HUD/PHA Trying to Accomplish	What Resources are We Using	Community Needs Assessment	What are We Doing to Accomplish This			Immediate Positive Change in Belief	Short Term Positive Change in Behavior	Long Term Positive Change in Status/Situation
Economic Self-Suff			Comm Needs Assess					
Econ Self Suff			Case Management					
			Coord Direct Service					
			> Emp Assessments					
			> GED Classes					
			> Skills Training					
Housing Self-Suff			> Zomba Exercise					
			> Food Distribution					
Age In Place			> Budgeting					
			> Fin Lit Class					Service Design



Remember Grant Requirement 2023-2025 Areas of Need

2023	2024	2025
PHA chooses Area of Need from a range provided by HUD	PHA chooses Area of Need from a range provided by HUD	PHA chooses Area of Need from a range provided by HUD
Choose from "Area of Need" Digital Inclusion Education Employment Financial Literacy Elderly/Disabled Substance Abuse Health and Wellness Re-entry [Digital Inclusion (added 2021)]	Choose from "Area of Need" Education Employment Financial Literacy Elderly/Disabled Substance Abuse Health and Wellness Re-entry Digital Inclusion	Choose from "Area of Need" Education Employment Financial Literacy Elderly/Disabled Substance Abuse Health and Wellness Re-entry Digital Inclusion
Must match community needs assessment	Must match community needs assessment	Must match community needs assessment



Remember Areas of Need
Include in Service Design

- Choose from "Area of Need"
 - Education
 - Employment
 - Financial Literacy
 - Elderly/Disabled
 - Substance Abuse
 - Health and Wellness
 - Re-entry
 - Digital Inclusion

One of these

If choose one of these - must choose



Remember Core Functions in ROSS Program

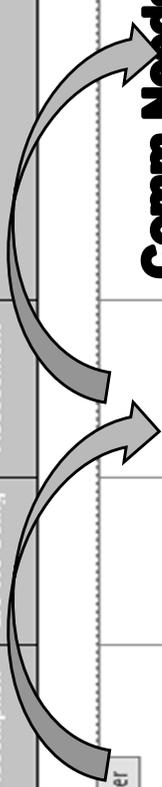


- Community Needs Assessment
- Case Management/Coaching
- Coordination/Direct Service
- Resident Empowerment
- Strategic Partnership Engagement
- Service Evaluation
- Reporting



2 ROSS Service Design Model thru Outcomes Blank

HUD/PHA Goals	Inputs	Area of Need	Activities (Core Functions)	Outputs		Outcomes	Outcomes	Outcomes
				How Many Activities Do We Do	How Many Participations in Each Activity			
What are HUD/PHA Trying to Accomplish	What Resources are We Using	Community Needs Assessment	What are We Doing to Accomplish This			Immediate Positive Change in Belief	Short Term Positive Change in Behavior	Long Term Positive Change in Status/Situation
Economic Self-Suff			Comm Needs Assess					
Econ Self Suff		• Emp	Case Management					
			Coord Direct Service					
			> Emp Assessments					
			> GED Classes					
			> Skills Training					
Housing Self-Suff		• Health	> Zomba Exercise					
			> Food Distribution					
Age In Place		• Financial Lit	> Budgeting					
			> Ftn Lit Class					Service Design



Example of Sfs Activities

ESL Class Service Code	= 1, 2, or 3
Career Guidance Service Code	= 1, 2, or 3
Self-Directed Job Search Assistance Service Code	= 1, 2, or 3
Work Readiness Assistance Service Code	= 1, 2, or 3
Occupational Skills Training Service Code	= 1, 2, or 3
Job Development Service Code	= 1, 2, or 3
Job Retention Service Code	= 1, 2, or 3
Fair Housing and Civil Rights Assistance Service Code	= 1, 2, or 3
Tax Preparation Service Code	= 1, 2, or 3
Financial Account Creation Service Code	= 1, 2, or 3
Legal Assistance Service Code	= 1, 2, or 3
Financial Education Service Code	= 1, 2, or 3
Pre-Housing Counseling Service Code	= 1, 2, or 3
Post-Housing Counseling Service Code	= 1, 2, or 3
Food and Nutrition Service Code	= 1, 2, or 3
Conflict Resolution Service Code	= 1, 2, or 3
Translation/Interpretation Service Code	= 1, 2, or 3
Housing Retention Service Code	= 1, 2, or 3
Household Skills/Life Skills Service Code	= 1, 2, or 3
Needs Assessment Service Code	= 1, 2, or 3
Service Coordination Service Code	= 1, 2, or 3
Parenting Skills Service Code	= 1, 2, or 3
3 to 5 Years Childhood Education Service Code	= 1, 2, or 3
High School/GED Preparation Service Code	= 1, 2, or 3
Post-Secondary/College Education Service Code	= 1, 2, or 3
Shelter Placement Service Code	= 1, 2, or 3
Temporary Housing Placement Service Code	= 1, 2, or 3
Permanent Housing Placement Service Code	= 1, 2, or 3
Independent Living Service Code	= 1, 2, or 3
Transportation Assistance Service Code	= 1, 2, or 3
HIV/AIDS Service Code	= 1, 2, or 3
Adult Personal Assistance Service Code	= 1, 2, or 3
Legal Assistance Type Service Code	= 1, 2, 3, 4, 5,

Design Service Program



- Core functions are “Activities”
 - Community Needs Assessment
 - Coordination/Direct Service
 - Case Management/Coaching
 - Resident Empowerment
 - Strategic Partnership Engagement
 - Service Evaluation
 - Service Reporting



Design Service Program



- Activities are also “Activities”
 - Food distribution
 - Clothes closet
 - GED and ESL classes
 - Employment choice assessments
 - Financial literacy coaching
 - Anger management workshop
 - Parenting workshop



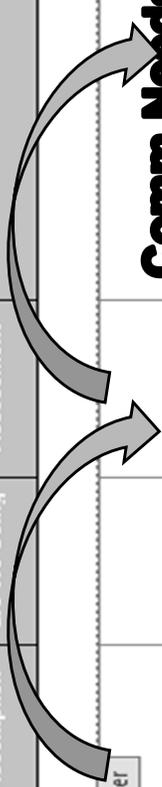
Design Direct Service Program

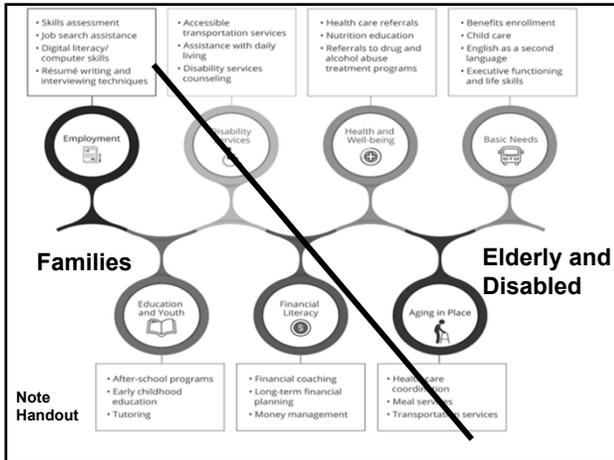
- For each activity describe tasks and design steps
 - Outreach
 - Orientation
 - Enrollment
 - Services On-going
 - Completion



2 ROSS Service Design Model thru Outcomes Blank

HUD/PHA Goals	Inputs	Area of Need	Activities (Core Functions)	Outputs		Outcomes	Outcomes	
				How Many Activities Do We Do	How Many Participations in Each Activity			
What are HUD/PHA Trying to Accomplish	What Resources are We Using	Community Needs Assessment	What are We Doing to Accomplish This			Immediate Positive Change in Belief	Short Term Positive Change in Behavior	Long Term Positive Change in Status/Situation
Economic Self-Suff			Comm Needs Assess Outreach, Orient, Enroll, Serve					
Econ Self Suff		• Emp Management Outreach, Orient, Enroll, Serve	Case Management Outreach, Orient, Enroll, Serve					
			Coord Direct Service					
			> Emp Assessments Outreach, Orient, Enroll, Serve					
			> GED Classes Outreach, Orient, Enroll, Serve					
			> Skills Training Outreach, Orient, Enroll, Serve					
Housing Self-Suff		• Health	> Zomba Exercise Outreach, Orient, Enroll, Serve					
			> Food Distribution Outreach, Orient, Enroll, Serve					
Age In Place		• Financial Lit	> Budgeting Outreach, Orient, Enroll, Serve					
			> Fin Lit Class Outreach, Orient, Enroll, Serve					Service Design





Design Direct Service Program

- Now Service design shows
 - HUD/PHA goals
 - Areas of Need
 - Core Functions and
 - Activities and tasks accomplish the goal
- Question is ...

Area	Sub-Area	Activity	Output	Outcome	Impact
Economic Self-Sufficiency	Case Management	Case Assessment	Case Assessment Report	Improved Case Management	Increased Self-Sufficiency
		Case Management	Case Management Plan	Improved Case Management	Increased Self-Sufficiency
		Case Management	Case Management Plan	Improved Case Management	Increased Self-Sufficiency
		Case Management	Case Management Plan	Improved Case Management	Increased Self-Sufficiency
Housing Self-Sufficiency	Health	Health Assessment	Health Assessment Report	Improved Health	Improved Housing Stability
		Health Management	Health Management Plan	Improved Health	Improved Housing Stability
		Health Management	Health Management Plan	Improved Health	Improved Housing Stability
		Health Management	Health Management Plan	Improved Health	Improved Housing Stability

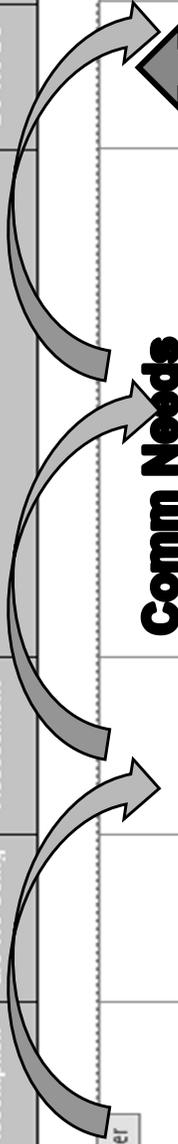
Design Direct Service Program

- Question is “what are activities intended to do?”
 - Make a positive change over time
 - Outputs
 - Outcomes
 - Immediate
 - Short term
 - Long-term

Area	Sub-Area	Activity	Output	Outcome	Impact
Economic Self-Sufficiency	Case Management	Case Assessment	Case Assessment Report	Improved Case Management	Increased Self-Sufficiency
		Case Management	Case Management Plan	Improved Case Management	Increased Self-Sufficiency
		Case Management	Case Management Plan	Improved Case Management	Increased Self-Sufficiency
		Case Management	Case Management Plan	Improved Case Management	Increased Self-Sufficiency
Housing Self-Sufficiency	Health	Health Assessment	Health Assessment Report	Improved Health	Improved Housing Stability
		Health Management	Health Management Plan	Improved Health	Improved Housing Stability
		Health Management	Health Management Plan	Improved Health	Improved Housing Stability
		Health Management	Health Management Plan	Improved Health	Improved Housing Stability

2 ROSS Service Design Model thru Outcomes Blank

HUD/PHA Goals	Inputs	Area of Need	Activities (Core Functions)	Outputs		Outcomes	Outcomes	Outcomes
				How Many Activities Do We Do	How Many Participations in Each Activity			
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Economic Self-Suff			Comm Needs Assess Outreach, Orient, Enroll, Serve					
Econ Self Suff		• Emp	Case Management Outreach, Orient, Enroll, Serve	50	1			
			Coord Direct Service					
			> Emp Assessments Outreach, Orient, Enroll, Serve					
			> GED Classes Outreach, Orient, Enroll, Serve	3 yr	10			
			> Skills Training Outreach, Orient, Enroll, Serve	2 yr	12			
Housing Self-Suff		• Health	> Zomba Exercise Outreach, Orient, Enroll, Serve					
			> Food Distribution Outreach, Orient, Enroll, Serve	52 yr	25			
Age In Place		• Financial	> Budgeting Outreach, Orient, Enroll, Serve					
		Lit	> Fin Lit Class Outreach, Orient, Enroll, Serve					
								Service Design



Standards for Success Indicators

Employment rate

Average quarterly earnings

Participation rate in Head Start or Pre-K

Participation rate in high school or GED prep

Percent attainment of a degree

Percent attainment of a vocational/occupational license or certificate

Percentage with a primary health care provider

Percentage who received routine medical exam in the last 12 months

Percentage with health plan coverage

Percentage with asthma who have asthma-related emergency room visits

Percentage of children with elevated blood-lead level results

Utilization rate of services/programs by homeless individuals

Average time from homelessness to permanent placement

Percentage of chronically homeless that is permanently housed

Percentage in neighborhood of opportunity

Percentage of income spent on housing and transportation

Percentage that improved living situations

Example Financial Outcomes

Title	Description	Purpose
Earned Income Tax Credit Recipient Code	Participant received an Earned Income Tax Credit (EITC)	Outcome
Financial Account Creation Code	Participant has a financial account	Outcome
Supplemental Security Income (SSI) Code	Participant received Supplemental Security Income (SSI)	Outcome
Social Security Disability Insurance (SSDI) Code	Participant received Social Security Disability Insurance (SSDI)	Outcome
Household Annual Gross Income Amount	Household's self-reported annual gross income	Outcome
Tax Preparation Service Code	Participant received tax preparation services	Outcome
Legal Assistance Service Code	Participant received legal assistance	Outcome
Legal Assistance Type Service Code	Type of legal assistance Participant received	Outcome
Financial Education Service Code	Participant received financial management assistance	Outcome
Household Housing Cost Amount	Participant's monthly household housing costs	Process

2 ROSS Service Design Model thru Outcomes Blank

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						Long Term Positive Change in Status/Situation	

Header

Comm Needs

Assess

Case

Management

>

Coord Direct

Service

>

>

>

• Health

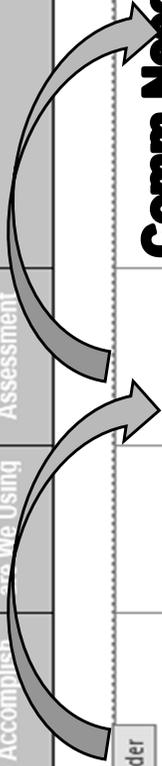
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**Age
In
Place**

**• Financial
Lit**

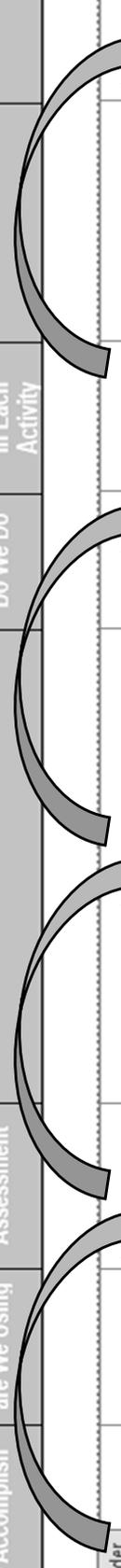
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Service Design



2 ROSS Service Design Model thru Outcomes Blank

HUD/PHA Goals	Inputs	Area of Need	Activities (Core Functions)	Outputs		Outcomes	Outcomes	Outcomes
				How Many Activities Do We Do	How Many Participations in Each Activity			
What are HUD/PHA Trying to Accomplish	What Resources are We Using	Community Needs Assessment	What are We Doing to Accomplish This			Immediate Positive Change in Belief	Short Term Positive Change in Behavior	Long Term Positive Change in Status/Situation
Economic Self-Suff			Comm Needs Assess Outreach, Orient, Enroll, Serve					
			Case Management Outreach, Orient, Enroll, Serve	50	1	I need resources	I am Using Services	I am Employed
Econ Self Suff		• Emp	Coord Direct Service					
			> Emp Assessments Outreach, Orient, Enroll, Serve					
			> GED Classes Outreach, Orient, Enroll, Serve	3 yr	10	I Believe I can learn	I am taking classes	I have GED
			> Skills Training Outreach, Orient, Enroll, Serve					
Housing Self-Suff		• Health	> Zomba Exercise Outreach, Orient, Enroll, Serve					
			> Food Distribution Outreach, Orient, Enroll, Serve					
Age In Place		• Financial	> Budgeting Outreach, Orient, Enroll, Serve					
		Lit	> Fin Lit Class Outreach, Orient, Enroll, Serve					
								Service Design



2 ROSS Service Design Model thru Outcomes Blank

HUD/PHA Goals	Inputs	Area of Need	Activities (Core Functions)	Outputs	Outcomes	Outcomes		
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Header

Economic Self-Suff

Econ Self Suff

• **Emp**

Comm Needs Assess
Outreach, Orient, Enroll, Serve

Case Management
Outreach, Orient, Enroll, Serve

Coord Direct Service

> **Emp Assessments**

Outreach, Orient, Enroll, Serve

> **GED Classes**

Outreach, Orient, Enroll, Serve

> **Skills Training**

Outreach, Orient, Enroll, Serve

Housing Self-Suff

> **Zomba Exercise**

Outreach, Orient, Enroll, Serve

> **Food Distribution**

Outreach, Orient, Enroll, Serve

Age In Place

• **Financial Lit**

> **Budgeting**

Outreach, Orient, Enroll, Serve

> **Fin Lit Class**

Outreach, Orient, Enroll, Serve

Just an example

Self Knowledge

Need Resources

Believes Change is Possible

Participant Using Services

Identifying Own Services

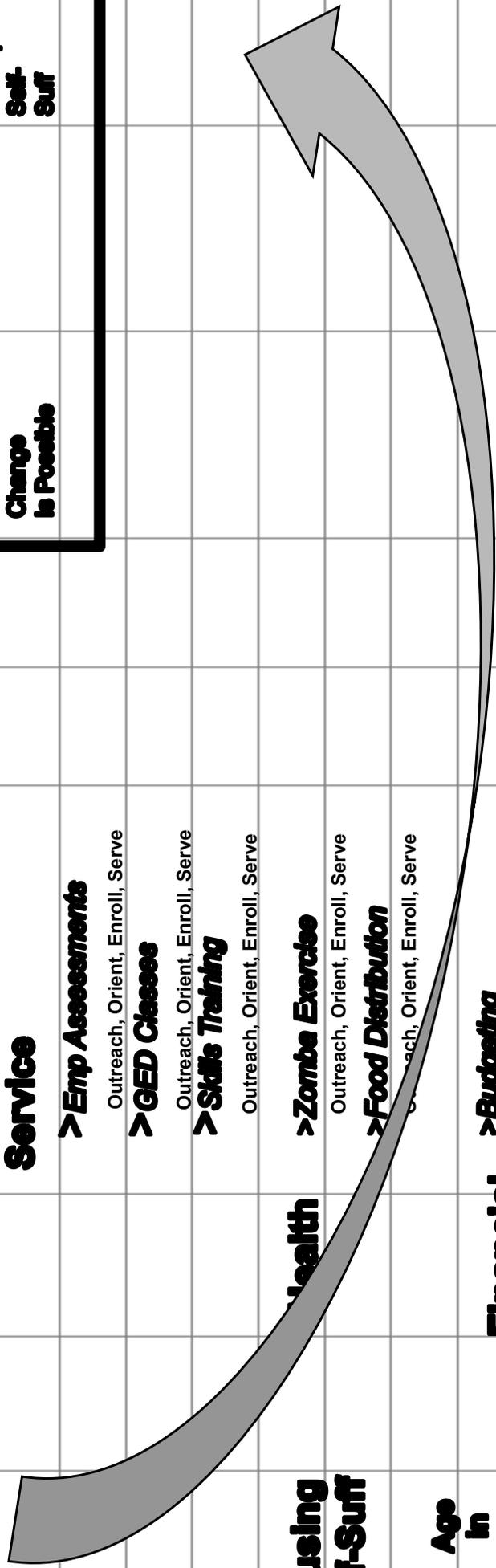
Participant Self-Suff

Participant Employed



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Service Design

Getting Ross Started

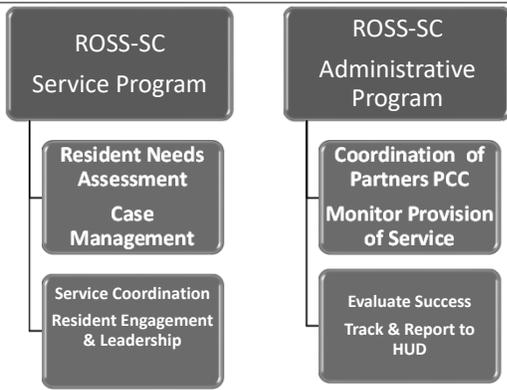
- Week 4-7
 - Meet with community providers
 - Design service program and documents
 - Design admin program and documents
 - Write ROSS policy
 - Develop resource directory
 - Meet with PCC





- Design Administrative Program





Design ROSS Program

- Two parts to any program
 - Service Delivery
 - Administration
- Both need to be designed
 - Describe steps – create paperwork
 - Big isn't important-CLEAR is important



Design Administrative Program

- For each direct and administrative management activity describe steps for tracking
 - Outputs
 - Indicators
 - Outcomes
 - What are you going to see
 - Data instruments
 - What forms/spread sheets
 - Reports
 - Which reports



- Let's take a look



Administrative Design Documents



- Tracking system
 - Raw data in client/activity/core function
 - Hard copy or...
 - Data base
 - Summary data on monthly chart
 - Report data on quarterly chart
 - Quarterly data to annual report



Administrative Design Documents

- Documents
 - Client files
 - Activity files
 - Provider, design, evaluations
 - Core function
 - Resource or Services files
 - Provider's info and evaluation
 - Tracking system




Administrative Design Documents For Each Participant

- Client files
- Application for ROSS
- Confidentiality Agreement
- Authorizations to Release Information
- Individual assessments informal/formal
- Individual Plan
- Historical/Case Notes
- Reports of Contact
- Activity Attendance Reports
- Incident Reports
- Correspondence





- Let's look at an example
 - Interest card
 - Confidentiality Agreement
 - Authorization to Release Information
 - Let's look at an example
 - ...

Resident Opportunity and Self Sufficiency Interest Card

Yes! I'm interested in the Resident Opportunity & Self Sufficiency Program

Call me! I want to sign up as soon as possible!
 Tell me where the next Orientation Meeting is!
 Send me an application!

My Name _____
 My phone number _____
 My Address _____
 My Housing Assistant/Specialist is _____

A program of Any Town Housing Authority
 555-555-4321
 Call for Information

CONFIDENTIALITY AGREEMENT

Mrs. Smith, as a resident of the Any Town Housing Authority's Beech Gardens and a participant in the Resident Opportunity program it is important for you to know that Any Town Housing Authority, and it's employees, will protect your right to confidentiality. Confidentiality means protecting another person's right to privacy.

In order for residents to have trust in the relationship with the Resident Service Coordinator at Any Town's Beech Gardens, it is important for you to know that the information you share with the Resident Service Coordinator will not be communicated to anyone without your written release.

A Release of Confidential Information form is used to obtain your permission. A signed form allows the Resident Service Coordinator to discuss your service needs and desires with specific community service providers, family members, physicians, and other individuals in order to link you to programs and services that may benefit you.

As your Resident Service Coordinator, I agree to protect your right to privacy and confidentiality within the ethical and legal limitations of my position and profession. The ethical and/or legal limitations to my promise of confidentiality include:

- > **Adult Protection Services:** I am legally and/or ethically obligated to report adults with disabilities who have been subjected to physical abuse, neglect, or exploitation or who are living in hazardous conditions to the Disabled Persons Protection Commission. Likewise, I am legally and ethically obligated to report elder abuse and/or neglect to Protective Services and/or Executive Office of Elder Affairs.
- > **Child Protection Services:** I am obligated to report suspected child abuse and/or neglect to Department of Social Services.
- > **Police Department:** If I believe a child or elder is in imminent danger, I am obligated to report this to the local police department.
- > **Courts:** I may be required by law in a court action to reveal information shared with me or contained within my resident files.
- > **Housing Authority:** I have a responsibility to the Any Town Housing Authority, as my employer, and to the community to report lease violations that come to my attention in the course of my duties.

Resident Service Coordinator _____ Date _____

I have read and understand this agreement.

Resident Signature _____ Date _____

Direct Service Design Documents For Each Activity

- Outreach material
- Educational material
- Sign In Sheets
- Activity Agendas
- Activity Content
- Activity Evaluations
- Attendance at activities-entry, on-going, end



- Let's look at an example
 - Flyers
 - Outreach letters
 - Interest Card
- ...



Armando Saved \$15,000 to Buy a Home!

You Can Too!



The Family Self Sufficiency Program Gives You...

- > Five Years of Help Getting a High Paying Job
- > Savings Account – To Use Now or Later
- > Extra Help with Child Care and Transportation

Send FSS Interest Card Now!
 Program Limited to 25 Families
 City of Any Town Housing Authority

Any Town Housing Authority
Any Town, USA
In Service In Excellence

Dear Resident (Fill in Name):
My name is Patrice Simpson. I have just joined the Riverfront Village Apartments Team at Any Town Housing Authority as Service Coordinator. I can help you and your family with information about and connection to activities and services in Any Town.
It's important to The Riverfront Village team and the Any Town Housing Authority that you and your family feel safe, happy, and a part of the community while you live here at Riverfront Village. It's important to me to meet you and your neighbors soon. I want to get your ideas, directly from you, how I can best serve this community.

**Please join us to say "Hello"!
Ice cream and Coffee
Village Community Center
Friday Afternoon
3:00 p.m.
or
Saturday Morning
10:00 A.M.**

Please feel free to bring family members too!

I'm looking forward to meeting you all!

Patrice Simpson
Service Coordinator
555-555-4321

Any Town Housing Authority
Any Town, USA
In Service In Excellence

Dear Resident (Fill in Name):
Need help finding and keeping high paying jobs? The Any Town Housing Authority has started a new program to help public housing families do just that! The program, Resident Opportunity and Self Sufficiency ROSS, could connect you and your family to special services like training for a job, finding a job, child care, and transportation, and a savings account when your wages go up after you start the program. Come find out how it works!

**Please join us to learn more about ROSS!
Village Community Center
Friday Afternoon
3:00 p.m.
or
Saturday Morning
10:00 A.M.**

Ice cream and Coffee Served

Please feel free to bring family members too!

My name is Patrice Simpson. I am the Service Coordinator for the Resident Opportunity and Self Sufficiency program at Any Town Housing Authority. It's important to the Any Town Housing Authority that you and your family receive these special services if you are interested in getting and keeping higher paying jobs. I want to get your ideas, directly from you, how I can best help you do that and serve this community.

I'm looking forward to seeing you all!

Patrice Simpson
Service Coordinator 555-555-4321 NMA

Getting Ross Started

- **Week 4-7**
 - Meet with community providers
 - Design service program and documents
 - Design admin program and documents
 - Write ROSS policy
 - Develop resource directory
 - Meet with PCC



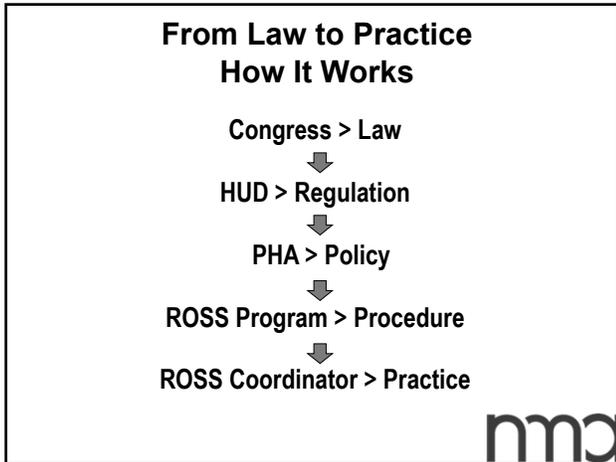


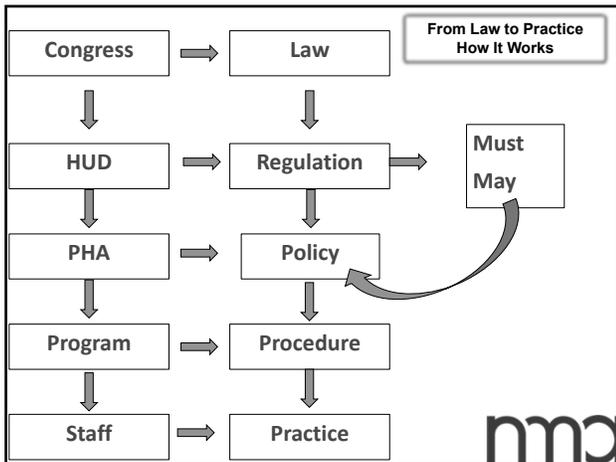


ROSS Policy

- HUD regulations leave many decisions to the ROSS PHA
- HUD encourages ROSS programs to develop polices

nma





ROSS Policy Mandatory References

- Statutes
- HUD Regulations
- Current PIH notices
- HUD handbooks
- Forms required by HUD
- OGC opinions or rulings

mma

**ROSS Policy
HUD Regulations**

- The PHA must...
- The PHA shall...

→ *No Choice:
Do It!*

- The PHA may not...
- The PHA must not...
- The PHA shall not...

→ *Prohibited:
Can't Do It !*



ROSS Policy

- Where policies are needed PHA may use “suggestions” from HUD as guideline
 - “Safe Harbor”
 - Certainty that policy implements law
- ROSS policies means
 - ROSS Plan
 - What should we use?



ROSS Policy

- Expired PIH notices
- Old NOFOs
- Other Program
 - HUD handbooks
 - Forms required by HUD
- Verbal/Written Clarifications from HUD without a reference




**ROSS Policy Contents
(Not Required)**

- Methods for outreach
- Case management procedures
- Referrals to service providers
- Methods for tracking program outcomes
- Software tools for case management
- Lists of partners
- Lists of potential partnerships
- Description of composition of PCC

**ROSS Policy Contents
(Not Required)**

- Methods for generating funding
- Description expenses using ROSS funds
- Plans for timely draws;
- Training resources for Service Coordinators;
- Plans for coordinating ROSS PHA
- Steps to meet HUD's reporting requirements
- Other optional



Getting Ross Started

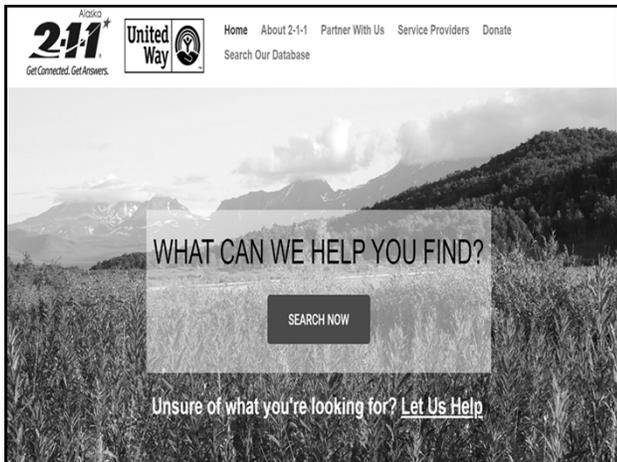
- Week 4-7
 - Meet with community providers
 - Design service program and documents
 - Design admin program and documents
 - Write ROSS policy
 - Develop resource directory
 - Meet with PCC



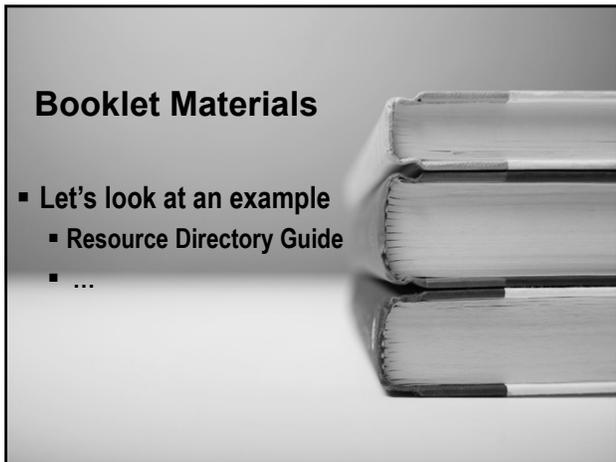
Develop Resource Directory

- Develop ROSS directory
 - Use existing directories
 - Develop protocol for private providers









Resource Guide/Directory Service Provider Information Sheet

Agency/Organization Name: _____

Address: _____

Phone: _____ Fax: _____

Contact Name: _____

Services Provided: _____

Special Requirements/Considerations:

<input type="checkbox"/> Application Needed	<input type="checkbox"/> Flat Fee/Rate
<input type="checkbox"/> Limited Service Area	<input type="checkbox"/> Discounts Available
<input type="checkbox"/> Sliding Fee Scale	<input type="checkbox"/> Services Provided On-site
<input type="checkbox"/> Limited Hours of Availability	<input type="checkbox"/> Services Provided Off-site

Other: _____

Notes: _____

Getting Ross Started

- Week 4-7
 - Meet with community providers
 - Design service program and documents
 - Design admin program and documents
 - Write ROSS policy
 - Develop resource directory
 - Meet with PCC



Conduct First PCC Meeting

- Carefully develop attendance list
 - Management
 - Staff providers
- Invite-don't commit...see invite
 - Bring agenda, handouts, chart of demographics
- Goals
 - Identify clients and goals in common



Booklet Materials

- Let's look at an example
 - PCC invite
 - PCC agenda
 - PCC minutes
 - Linkage Agreement
 - MOU (in handout)





ROSS Evaluation

Section 8



ROSS Evaluation

- ROSS must develop effective, quantifiable, outcome plan for...
 - Measuring performance
 - Determining goals have been met
- HUDs framework is Standards for Success (S4S)

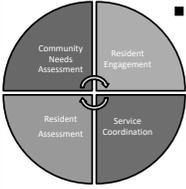



ROSS Evaluation

- PHA must regularly monitor/evaluate progress of
 - Participants
 - Success of ROSS program
- As HUD defines
 - Areas of Need
 - Activities to meet need
 - Participants changes over time

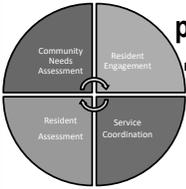



ROSS Evaluation



- HUD reviews ROSS performance in
 - Achieving promised goals } Current Performance
 - Evaluating grant applications funding } Past Performance

ROSS Evaluation



- HUD reviews ROSS performance in
 - Annual reports on achieving promised goals } Current Performance
 - Standards for Success S4S - Audits
 - Evaluating grant applications funding } Past Performance
 - NOFO criteria

**ROSS Evaluation
Current Performance Criteria**



- In Standards for Success S4S
- PHA ROSS program
 - Activities
 - Outputs
 - Outcomes
 - Key performance indicators



**ROSS Evaluation
Past Performance Criteria**



- In NOFO
 - Recent, relevant, successful
 - Knowledge, experience, planning and managing SC SS grant programs implemented
 - Funds leveraged to provide services
 - Activities on time/within budget
 - Accomplished stated results and...

**ROSS Evaluation
Past Performance Criteria**

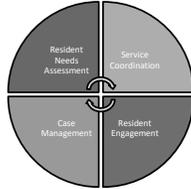


- In NOFO
 - Past performance
 - Match
 - Current performance
 - Affirming Fair Housing



ROSS Evaluation Current Performance

- Let's start with current performance



ROSS Evaluation Current Performance

- HUD expects grantee to achieve ROSS goals by end of grant
 - PHA reports annually
 - HUD looks annually and at end of grant
- HUD may use data to
 - Determine progress towards Key Performance Indicators
 - Compare PHA to other ROSS programs

ROSS Evaluation Current Performance

- Reported in Standards for Success S4S
 - FY16 thru FY25 grantees use HUD's Standards for Success
- Four options to submit info to HUD – not always service coordination software
 - Grant Solutions inForm tool
 - AASC Online
 - FamilyMetrics Software AKA
 - Other Case Management System... More later

**ROSS Evaluation
Current Performance**

▪ What S4S data is reported?




**ROSS Evaluation
Current Performance**

▪ What S4S data is reported?

- Area of need
- Activities
- Outputs
- Outcomes
- Key performance Indicators
- By client

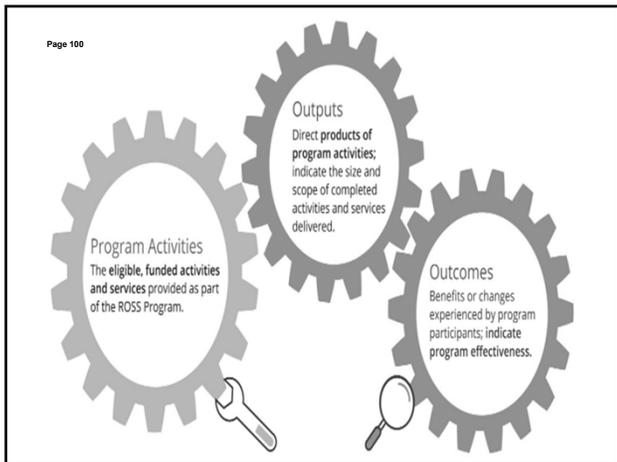


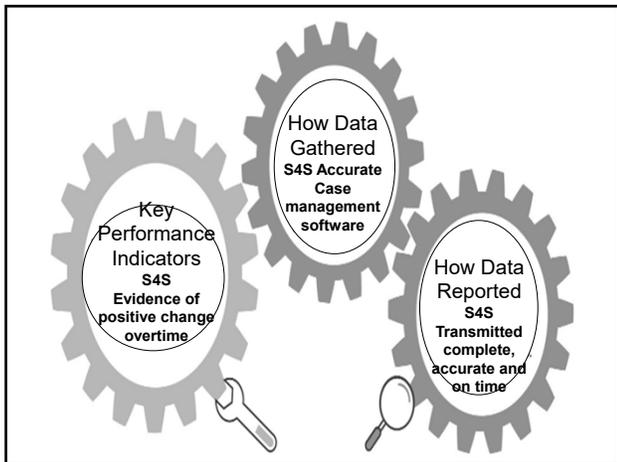

Data → Reporting

- Community Needs Assessment
• To Areas of Need
- Areas of Need
• To Activities
- Activities
• To Outputs
- Outputs
• To Outcomes
- Outcomes
• To Key Performance Indicators
- Key Performance Indicators
• To Data → To Report

ROSS Evaluation Current Performance

- **Basic characteristics**
 - Age, family size, current
- **Participation start date and end date**
- **Results from needs assessments**
 - Needs, barriers, skills, and goals
- **Referrals made and services received**
- **Progress in key outcome areas**
 - Emp, ed, financial literacy, health
- **Programs attended**
 - Nutrition/parenting etc







**ROSS Evaluation
Current Performance**

- ROSS Program Outcomes
 - Employment
 - Positive change in employment
 - Positive increase in resident earned income
 - Positive change in earnings at or above living wage

**ROSS Evaluation
Current Performance**

- ROSS Program Outcomes
 - Financial Literacy
 - Positive increase in resident net worth
 - Positive increase in credit score
 - Increase in number of residents with no bank accounts opening bank accounts

**ROSS Evaluation
Current Performance**

- **ROSS Program Outcomes**
 - **Education**
 - Positive percent change in educational attainment of residents.
 - Percent increase in number of workable adults with no high school diploma enrolled in GED class and/or workable adults enrolled in adult continuing education.

**ROSS Evaluation
Current Performance**

- **ROSS Program Outcomes**
 - **Health & Wellness**
 - Positive percent change in resident self-assessment of health & well-being.
 - Positive percent change in number of residents with Primary Care Provider
 - Increase in number of residents with access to exercise opportunities

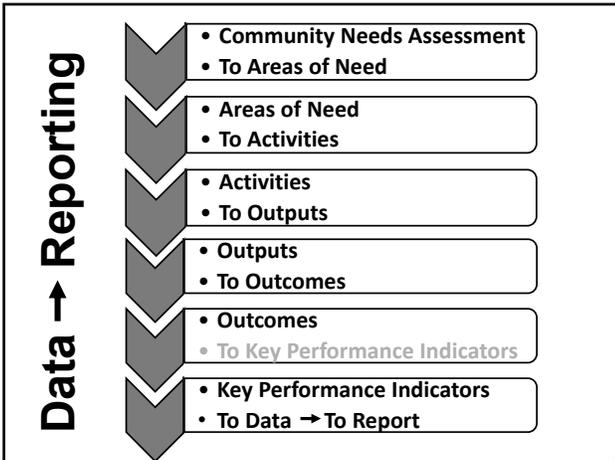


**ROSS Evaluation
Current Performance**

- **ROSS Program Outcomes**
 - **Reentry and/or Substance Abuse**
 - Positive change in barriers removed leading to employment and health and well-being
 - Positive percent change in number of residents receiving treatment

**ROSS Evaluation
Current Performance**

- **ROSS Program Outcomes**
 - **Elderly/Disabled**
 - Positive change in number of barriers removed leading to stability in health and well-being
 - Positive change in number of barriers removed to maintain housing stability



**ROSS Evaluation
Current Performance - KPIs**

- **Key Performance Indicators**
 - Remember Key Performance Indicators are...

**ROSS Evaluation
Current Performance - KPIs**

- **Education - Coordinators work with residents for education/training levels for living wage jobs**
 - **KPIs**
 - Residents attain High School Diploma or GED
 - Residents attain higher education
 - Residents enrolled in ed or vocational training
 - Residents attain license/certification
 - Residents receive education related services

**ROSS Evaluation
Current Performance - KPIs**

- **Health/Wellness - Coordinators work to ensure family's physical/mental health**
 - **KPIs:**
 - Residents without health insurance receive health insurance.
 - Resident attends medical examinations at least once every 12 months.
 - Residents receiving health related services.
 - Residents with less emergency room visits.

**ROSS Evaluation
Current Performance - KPIs**

- **Employment - Coordinators work with resident's employment more than 12 months**
 - **KPIs**
 - Unemployed residents receiving employment.
 - Employed residents retaining employment for more than 12 months.
 - Residents with part-time employment receiving full-time employment.
 - Residents receiving employment related services.

ROSS Evaluation
Current Performance - KPIs

- **Financial Literacy - Coordinators provide financial literacy, so monthly bills are not more than monthly income**
 - KPIs
 - Residents receiving Earned Income Tax Credit (EITC)
 - Residents with no financial account receiving a financial account
 - Residents receiving financial management related services

ROSS Evaluation
Current Performance - KPIs

- **Reentry - Coordinators work with residents involved with justice system to ensure justice system does not prevent education and employment**
 - KPIs:
 - Residents involved in the justice system receiving legal aid services
 - See education and employment

ROSS Evaluation
Current Performance - KPIs

- **Elderly/Disabled - Coordinators work with aging and people with disabilities for independence**
 - KPIs
 - Residents receiving elderly/disabled related services
 - Residents receiving Social Security Income and Social Security Disability insurance
 - See health and wellness

**ROSS Evaluation
Current Performance - KPIs**

- **Substance Abuse - Coordinators will work with service providers to address substance abuse through prevention and intervention services.**
 - **KPIs**
 - **Residents with drug or alcohol dependency are receiving substance abuse services**
 - **See health and wellness**



**ROSS Evaluation
Current Performance**

- **Reported in Standards for Success S4S**
 - **FY16 thru FY25 grantees use HUD's Standards for Success**
- **Four options to submit info to HUD – not always service coordination software**
 - **Grant Solutions inForm tool**
 - **AASC Online**
 - **FamilyMetrics Software AKA**
 - **Other Case Management System**



GrantSolutions PARTNERING IN INNOVATION

ABOUT BENEFITS SERVICES RISK MANAGEMENT PARTNERS NEWS LOGIN

Partnering to better serve the grants community

GrantSolutions is committed to Partner success by continuously improving comprehensive, flexible, and cost-effective end-to-end grants management services.

AASC Online Software for Service Coordinators

Free Test Drive | Contact Us

Overview Why Buy? Partners

Documenting services has never been easier.

As a service coordinator, you're faced with important challenges—serve more people, document more services, and deliver accurate performance reports quickly—all with limited time and a meager budget. But how can you be expected to do all that efficiently with paper-based processes, spreadsheets, or antiquated desktop software? It's time to embrace a whole new approach to documentation and outcomes tracking—AASC Online. Since 2004, AASC Online has been helping service coordinators simplify everything from tracking service referrals to standardizing outcome measurement to automating performance reports. Today, more than 2,000 professionals use AASC Online to make their jobs easier.

About AASC Online Features AASC Online Difference Pricing Getting Started

What is AASC Online?

AASC Online is Web-based software for service coordinators. It was developed by Pangea Foundation™ in collaboration with the American Association of Service Coordinators (AASC). Custom-designed to fit the unique needs of service coordinators working in senior and disability housing communities, AASC Online empowers service coordinators like never before.

- Web-based Software-as-a-Service removes the burden from your IT organization
- Simplify the documentation of services immediately
- Automate outcomes tracking and get accurate, real-time reports
- Tap into the power of data to engage key stakeholders
- Complete your HUD Semi-Annual Performance Report with one click

familymetrics

What We Deliver Who We Serve Pricing Sign In Try for Free

Software for family resident services

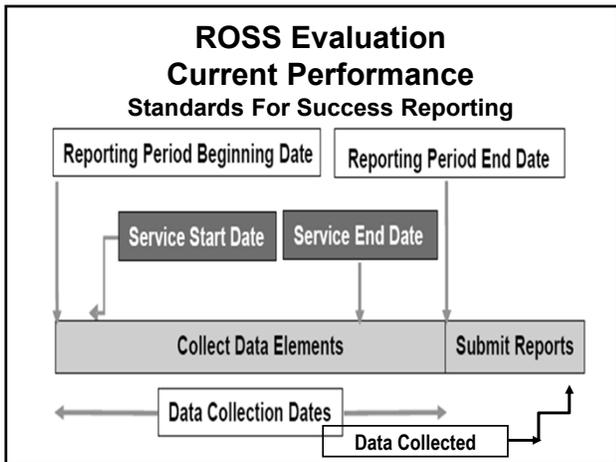
Powering case management, outcomes tracking, and performance reporting for family resident services

Try for Free

Over 150 standards Adherence reporting HUD reporting integration

ROSS Evaluation Current Performance

- When is S4S data reported?



ROSS-SC Data Dashboard
By Grantee

Select a Grantee
Choose Your Grantee

Data Dashboard by State
Data Dashboard Tables

Basic Metrics

- Overview
- Services Provided
- Outcomes over Time
- Data Availability

Services in Depth

- Services Provided
- Services by Population
- Demographic Breakdown
- Services over Time
- Grantee Service Comparison
- Grantee Cohort List

Outcomes in Depth

- Outcomes over Time
- Monthly Paid Earnings
- Access to Care
- Education
- Employment
- Public Benefits Received

**ROSS Evaluation
Past Performance**

- Past performance for grant
- Numbers served
- Match
- Current performance
- Affirming Fair Housing



**ROSS Evaluation
Past Performance - Grant**

- Achievement in serving residents (10 pts)
 - Numbers served
- Timely submission (5 pts)
 - October 30 every year
- Timely use of funds (10 pts)
 - 60% minus 10, 40-59% minus 5, 39% 10 pts
- Past performance “additional conditions or grant suspension(minus 10 pts)



**Number of Families/Units Served
Makes a Difference...Next Grant Application**

Number of Coordinators in 2017	Number of Residents Served	Points
1	25-49	5
1	50+	10
2	25-49	3
2	50-99	5
2	100+	10
3	25-49	1
3	50-99	3
3	100-149	5

**ROSS Evaluation
Past Performance**

- Past performance
- Match
- Current performance
- Affirming Fair Housing



**ROSS Evaluation
Remember Match Past Performance**

- Required match 25% of requested funds
 - Match is cash or in-kind
 - May not be from public housing operating sub
 - Match is precise, in writing showing total dollar value
- Match must be tracked



**ROSS Evaluation
Remember Match Past Performance**

- Volunteer time and services
 - Professional rate (or min wage)
 - X number of staff
 - X number of hours
 - X number of years
 - Ex: \$42.50 @ hr 1 GED X 20 hrs @ week X 3 years
- Donated material, equipment, space, lease
 - Value
 - X length of time
 - Ex: \$1,000 rent per month X 12 mo X 3 years

**ROSS Evaluation
Past Performance Audits**



- HUD uses on-site monitoring visits, off-site reviews, and audits



**ROSS Evaluation
Past Performance Audits**



- On-site monitoring with ROSS staff, participants and community partners
 - Review program records



**ROSS Evaluation
Past Performance Audits**



- Off-site review documentation if grantee is low-risk or specific issue
 - Review program records



Helpful Resources

[HUD Standards for Success¹](#)
[ROSS-SC Data Dashboard²](#)
[ROSS Data Guide & Webinars³](#)
[ROSS-SC Data Dashboard Webinars⁴](#)
[ROSS-SC Data Dashboard Tables⁵](#)

ROSS Evaluation Performance Reporting Tools

- _ Visit Standard for Success HUD Exchange webpage
- _ Standards for Success Checklist
 - _ <https://www.hudexchange.info/programs/standards-for-success/>
- _ ROSS Data Guide 4.0

ROSS Evaluation Contact Information

- For technical issues with reporting
 - help@grantsolutions.gov
- If you need a user account or have issues with login
 - AskGMO@hud.gov
- All other questions
 - ROSS-PIH@hud.gov





Service Coordination

Section 9

ROSS Core Function

- Provide case management and coaching
 - Intake
 - Assessment & planning
 - Goal setting
 - Education
 - Referral
 - Monitor services
 - Regular-ongoing basis



Role of Planning in Service Coordination

- Single greatest indicator someone will reach their goal
 - Written plan
- Provides
 - Guide
 - Reminder of next steps
 - Look at what has been accomplished

Page 117



Individual Training and Service Plan

- FINAL GOAL
- Interim Goal 1
- Task Person Time Resource




Booklet Materials

- Take a look at an example
 - Individual Training and Service Plan



Family Self-Sufficiency Program Individual Training and Services Plan Attachment _____

Name of Participant _____ Social Security Number _____

Final Goal _____

Interim Goal Number _____

Date Accomplished _____

Activities/Services _____ Responsible Parties _____ Dates _____

Comments _____

Signatures:

Family _____ Housing Agency _____

(Printed Name) _____ (Signature of ITR Representative)

(Date Signed) _____ (Date Signed)

Form 10-2015-0000-01/02/04/05
10/14/2015 10:00 AM

ROSS Core Function

- Provide case management and coaching
 - Intake
 - Assessment & planning
 - Goal setting
 - Education
 - Referral
 - Monitor services
 - Regular-ongoing basis



Booklet Materials

- Material for reference
 - Linkage Agreement
 - Memoranda of Understanding
 - Sub-Contract
 - Resident Newsletter



Informal Assessments

- Informal assessments beneficial...
 - Directly involve participant
 - Easier to get insight into selves
 - Useful without formal assessment training



Formal Assessments

- Conducted by certified/licensed personnel
 - Often removed from participant
 - More difficult to analyze
 - Useful in combination with informal assessment



Family Matrix



- Family matrix
 - Twelve life areas like housing or education
 - Lists characteristics of families for each



Booklet Materials

- Let's look at an example
 - Family Matrix



Strong Beginnings Program: Family Matrix Part 1

Status Level	Shelter	Food & Nutrition	Transportation & Mobility	Health & Safety	Social & Emotional Health & Competence
Benchmarks	<p>Benchmark Criteria</p> <ul style="list-style-type: none"> ◆ Living in housing of choice ◆ Spends less than 40% of income on housing rent or mortgage ◆ Has adequate housing space and rooms for family size ◆ Feels safe and secure in home and neighborhood ◆ Takes measures to maintain household in a safe and livable condition ◆ Owns property or has maintained tenancy for more than one year 	<p>Benchmark Criteria</p> <ul style="list-style-type: none"> ◆ Can afford a variety of healthy and nutritious foods ◆ Has appliances and utensils to prepare food in a variety of methods ◆ Eats nutritious, well-balanced meals on a regularly scheduled basis ◆ All special dietary requirements are met ◆ Is ideal weight 	<p>Benchmark Criteria</p> <ul style="list-style-type: none"> ◆ Has current and valid drivers license ◆ Has a vehicle that is safe and in adequate running condition ◆ Is fully insured and has comprehensive insurance coverage ◆ Can afford choice of transportation ◆ Is able to repair vehicle when needed 	<p>Benchmark Criteria</p> <ul style="list-style-type: none"> ◆ Has established relationships with health care professionals ◆ Has comprehensive health insurance ◆ Practices preventive health habits ◆ Practices safe behaviors in all environments 	<p>Benchmark Criteria</p> <ul style="list-style-type: none"> ◆ Working to change negative social and cultural conditions on a personal and community level ◆ Uses resources for personal development ◆ Is not using drugs or alcohol ◆ Is maintaining sobriety
Thriving	<ul style="list-style-type: none"> ◆ Lives in or has access to adequate housing ◆ Spends less than 50% of income on rent or mortgage ◆ Has some choice in housing options ◆ Feels safe and secure in home and neighborhood ◆ Has adequate space and rooms for family size ◆ Tenancy is secure for one year 	<ul style="list-style-type: none"> ◆ Has enough food to satisfy recommended daily allowances ◆ Has appliances and utensils to prepare most foods ◆ Eats well balanced meals on a regularly scheduled basis ◆ Special dietary needs are usually met ◆ Is ideal weight or less than 10 lbs. heavier or lighter than ideal weight 	<ul style="list-style-type: none"> ◆ Has current and valid drivers license ◆ Has and maintains own vehicle ◆ Has basic insurance coverage ◆ Has a good driving and accident record ◆ Has some choice of transportation 	<ul style="list-style-type: none"> ◆ Can access health care when needed ◆ Has insurance that covers at least 80 percent of costs of care ◆ Has adequate income to make payment arrangements ◆ Has sound health and hygiene practices ◆ Seeks timely assessment and treatment ◆ Practices safe behaviors in most environments 	<ul style="list-style-type: none"> ◆ Is able to cope with social, cultural and economic pressures ◆ Is not using drugs or alcohol ◆ Has used treatment to make progress toward sobriety and is maintaining sobriety ◆ Has well developed social support system – is able to receive as well as provide support ◆ Generally makes wise use of community resources to meet full range of family needs
Safe and/or Self-Sufficient	<ul style="list-style-type: none"> ◆ Housing is not hazardous, unhealthy or overcrowded ◆ Spends less than 60% of income on rent or mortgage ◆ Housing options may be limited ◆ Feels safe and secure in home ◆ All housing and utility costs are paid and up to date ◆ Has telephone or access to a telephone ◆ Tenancy is secure for more than six months 	<ul style="list-style-type: none"> ◆ Has adequate nutritious food ◆ Has some appliances and utensils to prepare food ◆ Eats at least one nutritious meal daily ◆ Food is sufficient to prevent malnutrition or health problems ◆ Is ideal weight or less than 20 lbs. heavier or lighter than ideal weight 	<ul style="list-style-type: none"> ◆ Has current and valid drivers license ◆ Has a vehicle ◆ Can afford alternate transportation when needed ◆ Can generally repair vehicle when needed 	<ul style="list-style-type: none"> ◆ Can and does access health care but has significant difficulty and/or gaps in health coverage ◆ Has major and emergency insurance coverage ◆ Has adequate income to pay treatment of care balances over time ◆ Generally practices sound hygiene ◆ Seeks treatment for significant problems ◆ Practices safe behaviors in many environments 	<ul style="list-style-type: none"> ◆ Is usually able to handle social, cultural and economic pressures ◆ Acknowledges any drug or alcohol problems and is utilizing treatment ◆ Generally using community resources needed to meet family needs ◆ Generally able to control symptoms of mental illness or seeks treatment when needed
Stable					

Status Level	Shelter	Food & Nutrition	Transportation & Mobility	Health & Safety	Social & Emotional Health & Competence
<p>At Risk and/or Vulnerable</p>	<ul style="list-style-type: none"> ◆ Lives in temporary or share housing ◆ Spends more than 60% of income for rent ◆ Housing options are severely limited or non-existent ◆ Living in unsafe and overcrowded conditions ◆ May have a recent eviction or utility shut off notice ◆ Feels unsafe in home and neighborhood ◆ May be dependent upon housing assistance ◆ Tenancy is secure for six months or less 	<ul style="list-style-type: none"> ◆ Family members are sometimes hungry and/or malnourished due to lack of food ◆ Does not have appliances and utensils to prepare food ◆ Nutritional requirements are not consistently met ◆ Eats when food is available ◆ Is obese or underweight 	<ul style="list-style-type: none"> ◆ Has a revoked, suspended or invalid drivers license ◆ May have insufficient funds to obtain transportation when needed ◆ Has unpaid traffic tickets ◆ Does not have safe or reliable transportation ◆ Does not have auto insurance ◆ Does not have income to obtain transportation 	<ul style="list-style-type: none"> ◆ Health care is sporadic ◆ Has difficulty accessing health care ◆ Is not covered by insurance ◆ Has inadequate income to access necessary health care ◆ Doesn't take care of self – ignores health problems ◆ Is unaware of and does not practice safe behaviors or hygiene practices 	<ul style="list-style-type: none"> ◆ Uses illegal drugs ◆ Abuses alcohol or prescription drugs ◆ Has inadequate social support systems but is beginning to develop appropriate connections ◆ Is often in denial of emotional, mental health, and/or substance abuse problems ◆ Is unable to control symptoms of mental illness or does not seek treatment when needed
<p>In Crisis</p>	<ul style="list-style-type: none"> ◆ Is homeless or on the verge of being homeless ◆ Has insufficient income for anything but substandard or temporary housing ◆ Living in housing that is unsafe, deteriorating or seriously over-crowded ◆ Fears for safety in home and neighborhood ◆ Lacks income or resources to maintain permanent housing ◆ Lacks basic household necessities 	<ul style="list-style-type: none"> ◆ Hunger is common ◆ Has a serious lack of resources to obtain food ◆ Evidence of or diagnosis of malnutrition ◆ Has a severe eating disorder ◆ No one is preparing meals ◆ Is extremely obese or severely underweight 	<ul style="list-style-type: none"> ◆ Is driving without a license ◆ Is driving without insurance ◆ Does not have a drivers license ◆ Does not know how to drive ◆ Is not insurable ◆ Has no access to transportation for basic needs ◆ Has no income to obtain transportation ◆ Has been incarcerated for traffic violations 	<ul style="list-style-type: none"> ◆ Has no access to health care ◆ Needs immediate health care ◆ Displays dangerous and/or self-destructive behavior 	<ul style="list-style-type: none"> ◆ Is unable to take care of self or family ◆ Has severe and untreated drug or alcohol abuse ◆ Has severe and untreated mental illness ◆ Has no social support system ◆ Is isolated

Strong Beginnings Program: Family Matrix Part 2

Status Level	Income & Budget	Family Relations & Parenting	Employment	Adult Education & Development	Children/Youth Education & Development
Benchmarks	Benchmark Criteria	Benchmark Criteria	Benchmark Criteria	Benchmark Criteria	Benchmark Criteria
Thriving	<ul style="list-style-type: none"> ◆ Sufficient earned income to allow family choices for non-essential purchases ◆ Able to save 10% of income ◆ Established relationship with insured financial institution ◆ Has a good credit rating ◆ Expects to increase income level within one year 	<ul style="list-style-type: none"> ◆ Has a strong supportive family with positive family identity ◆ Mutually agreed upon rules and expectations ◆ Conflicts are easily negotiated ◆ Is nurturing and consistently cares for family members ◆ Children are happy and socially well-adjusted ◆ Children enjoy parents 	<ul style="list-style-type: none"> ◆ Possesses marketable job skills and positive work experience ◆ Constant development of transferable job skills ◆ Permanent employment by secure business offering a comprehensive benefit package ◆ Has made steady advancement in career of choice ◆ Has solid job search and retention skills 	<ul style="list-style-type: none"> ◆ Has post secondary education or training ◆ Parents speak, read and write English ◆ Positive, supportive attitude toward education ◆ Set and pursue long range career and educational goals ◆ Highly value education for children 	<ul style="list-style-type: none"> ◆ Has little or no absenteeism ◆ Has high grades in most subjects and passing marks in every subject ◆ Has no discipline problems ◆ Is a leader among other students ◆ Has a positive attitude toward education
Safe and/or Self-Sufficient	<ul style="list-style-type: none"> ◆ Sufficient earned income to meet basic family needs ◆ Plans and sticks to a monthly budget ◆ Saves when possible ◆ Able to obtain a secured line of credit ◆ Pays bills on time, delays purchases to handle debt load ◆ Has a good credit rating ◆ Anticipates continuation of current income level for at least one year 	<ul style="list-style-type: none"> ◆ Supportive family with a generally positive identity ◆ Has realistic rules and manageable conflict ◆ Usually provides sound, nurturing care for family members ◆ Children unusually happy and outgoing; little violence or aggression ◆ Children are consistently able to relate to parents 	<ul style="list-style-type: none"> ◆ Has attained marketable job skills ◆ Is employed by a secure business offering some benefits ◆ Has employment with potential for advancement ◆ Has or can easily develop job retention skills. ◆ Has job search skills. ◆ Has sufficient wages to provide for family needs. 	<ul style="list-style-type: none"> ◆ Some family members speak, read and write English ◆ Have or are pursuing a high school diploma or equivalent education ◆ Enrolled in adult education, English as a Second Language, Vocational Education or College ◆ Values education for children 	<ul style="list-style-type: none"> ◆ Absenteeism is not high enough to be a concern ◆ Has passing marks in all subjects ◆ Has no discipline problems ◆ Has a good attitude toward education
Stable	<ul style="list-style-type: none"> ◆ Has an income barely adequate to meet basic needs ◆ Plans and sticks to a monthly budget ◆ Has no savings ◆ Able to obtain limited secured credit ◆ Generally pays bills on time ◆ No anticipated decrease in family income 	<ul style="list-style-type: none"> ◆ No abuse or neglect of any kind ◆ Learning positive family dynamics ◆ Care of family members is adequate ◆ Little violence or aggression ◆ Children are sometimes able to relate to parents ◆ Parents are involved in parenting, communication and/or family development training 	<ul style="list-style-type: none"> ◆ Considering or in the process of developing more marketable job skills ◆ Has seasonal, part time or temporary employment ◆ Has employment with inadequate hours, benefits and/or stability ◆ Has employment with limited advancement potential ◆ Has understanding of job search skills. Can search for a job with assistance. ◆ Wages are sufficient to meet most family needs 	<ul style="list-style-type: none"> ◆ Considers personal education needs and options ◆ Has or is pursuing a high school education ◆ Has limited English skills ◆ Can set and pursue some career and personal education goals with assistance ◆ Values some education for children 	<ul style="list-style-type: none"> ◆ Has some absenteeism but it is not impeding educational performance ◆ Is performing at a minimum educational level ◆ Has some discipline problems ◆ Gets along with most other students ◆ Making adequate progress in reading, writing and arithmetic skills ◆ Has an average attitude toward education

Status Level	Income & Budget		Family Relations & Parenting		Employment		Adult Education & Development		Children/Youth Education & Development	
	Benchmark Criteria	Benchmark Criteria	Benchmark Criteria	Benchmark Criteria	Benchmark Criteria	Benchmark Criteria	Benchmark Criteria	Benchmark Criteria	Benchmark Criteria	Benchmark Criteria
At Risk and/or Vulnerable	<ul style="list-style-type: none"> ◆ Has a limited income ◆ Is sometimes unable to meet basic needs ◆ Has spontaneous and inappropriate spending habits ◆ Has no savings ◆ Has limited ability to obtain credit ◆ Has unpaid bills ◆ Has an overwhelming debt load 	<ul style="list-style-type: none"> ◆ Outside placement of children is threatened ◆ Children have run away from home ◆ Unrealistic or non-existent rules ◆ Constant conflict ◆ Inadequate care ◆ Risk of abuse or neglect ◆ Children are unhappy, withdrawn, violent or aggressive 	<ul style="list-style-type: none"> ◆ Has limited job skills ◆ Has inadequate employment with no benefits ◆ Is not sure where or how to find the next job ◆ Has no advancement potential ◆ Has disciplinary or performance problems at work ◆ Has few job search or retention skills ◆ Wages are insufficient to meet family needs 	<ul style="list-style-type: none"> ◆ Has less than a ninth grade education ◆ Has severally limited English skills ◆ Does not consider education a priority ◆ Does not set or pursue educational or career goals 	<ul style="list-style-type: none"> ◆ Has a high absenteeism rate ◆ Is performing below educational level or is failing in one or more subjects ◆ Has continued discipline problems ◆ Exhibits gang related behavior ◆ Does not get along with other students ◆ Has serious difficulty with reading, writing and arithmetic skills ◆ Has a poor attitude toward education 					
	In Crisis	<ul style="list-style-type: none"> ◆ Has very little money and can not meet basic needs ◆ Unable to obtain credit ◆ Has unpaid bills and collectors calling ◆ Is dependent upon public assistance 	<ul style="list-style-type: none"> ◆ Existence of child or spousal abuse, neglect or violence ◆ Foster care or other placement of child has occurred or is imminent ◆ Intervention of criminal justice system is required to deal with family violence or abuse 	<ul style="list-style-type: none"> ◆ Is unemployed or unemployable ◆ Has minimum or no job skills ◆ Has negative work history ◆ Has negative work ethics or attitude ◆ Has no job search or retention skills 	<ul style="list-style-type: none"> ◆ Is illiterate ◆ Has no English skills ◆ Has no interest in or access to educational remedies ◆ Does not stress or value education for children 	<ul style="list-style-type: none"> ◆ Having great difficulty in school ◆ Drops out of school ◆ Has a poor attitude toward education ◆ Has serious development deficiencies ◆ Has serious behavioral problems 				

Formal Assessments

- Identify
 - Values – personal and vocational
 - Interests
 - Aptitudes
 - Abilities
 - Skills



Formal Assessments

- Career assessment instruments used in
 - Self knowledge
 - Vocational exploration
 - Vocational decision-making
 - Educational planning
 - Training planning
 - Vocational adjustment



Formal Assessment

- Remember...
 - Even a small amount of formal assessment can take SC and participant well beyond their current understanding of situation



Recommended SC Functions

- Provide service coordination...
 - Intake
 - Assessment & planning
 - Goal setting
 - Education
 - Referral
 - Monitor services
 - Regular-ongoing basis



Goal Setting

- Goals motivate, educate, and evaluate progress
 - Long term goals are central
 - Changes in status
 - Short term goals
 - Changes in belief and behavior
- Tasks are steps to goals
- Resources are essential
- Timeline is accurate



Ways to Develop Goals

- Extensive information gathering
- Guided imagery
- Brainstorm all possibilities
- List possible goals
- Prioritize by sorting into groupings
- Choose amongst these



Writing Effective Goals

- Built on values
- Positive action terms
- Specific and measurable tasks
- Time related
- Accomplishable
- Flexible
- Make a difference



Learning Activity 7

- Write 3 goals for a ROSS service coordinator (or ROSS program) for one year from now
- Remember
 - What will be happening if everything done perfectly – positive change
 - Begins with “To have” or “To be”



Resident Opportunity & Self Sufficiency Program Action

Goal	To Do	Priority	Again	Again	Who	When	How
	Clarify Goal of Program						
	Handle Myths						
	Build Bridges						
	Finalize Goal of ROSS						
	Activities to Match Grant						
	Design Service Delivery						
	Write ROSS Policy						
	Prepare Work Plan						
	Monitor Grant Performance						
	Review S4S Data Integrity Guide						
	Prepare for HUD Audit						
	Read ROSS NOFO etc.						
	Set Your Professional Goal						

Coordinator's Plan



Networking

Section 10

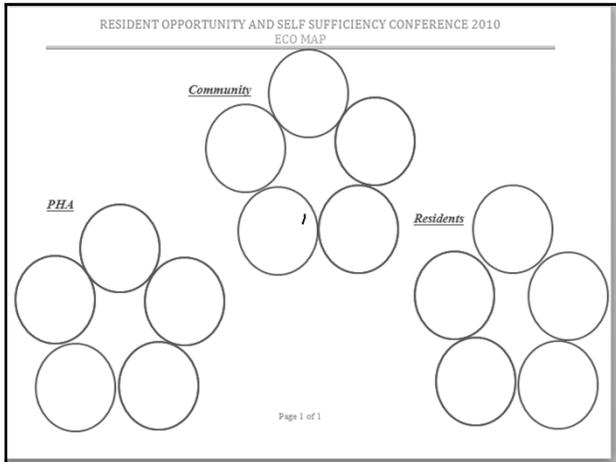
Your ROSS Community Networks

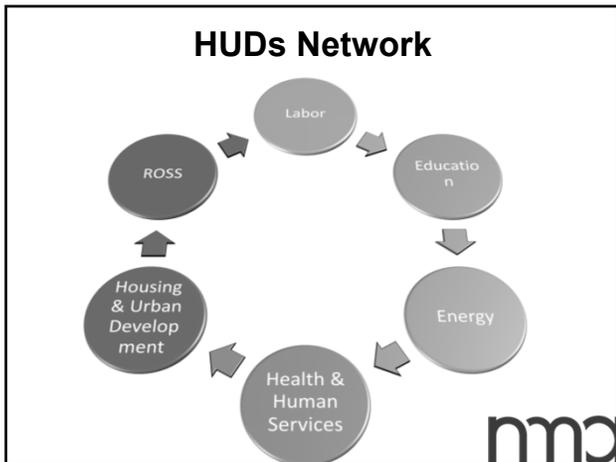


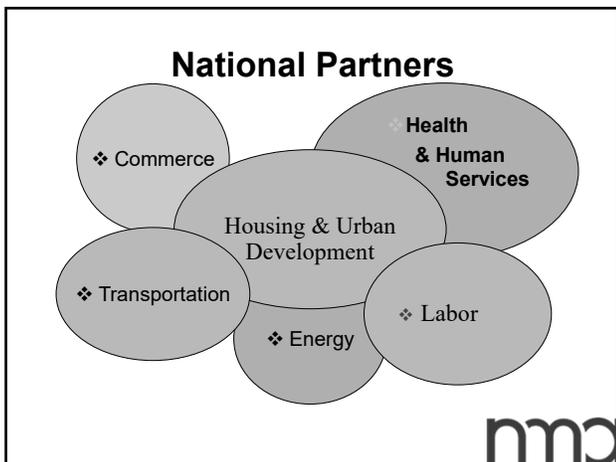
Agency/Clients/Community Networks

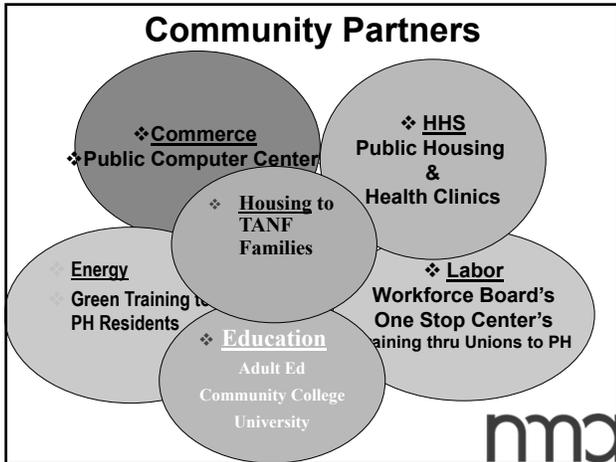
- PHA-Agency
 - Executive/property management
- Residents-Clients
 - Resident Associations
 - Families
 - Seniors & Persons w disabilities
- Community Services-NPO

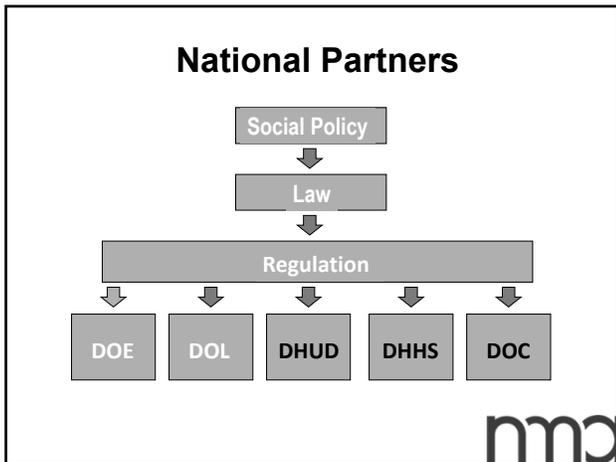














Practical Steps in Networking

- Networking with...
 - Agency
 - Residents
 - Community
- Networking is creating...
 - Community
 - Teams
 - Collaborations

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Practical Steps in Networking

- Create community
- Develop your team
- Build collaborations

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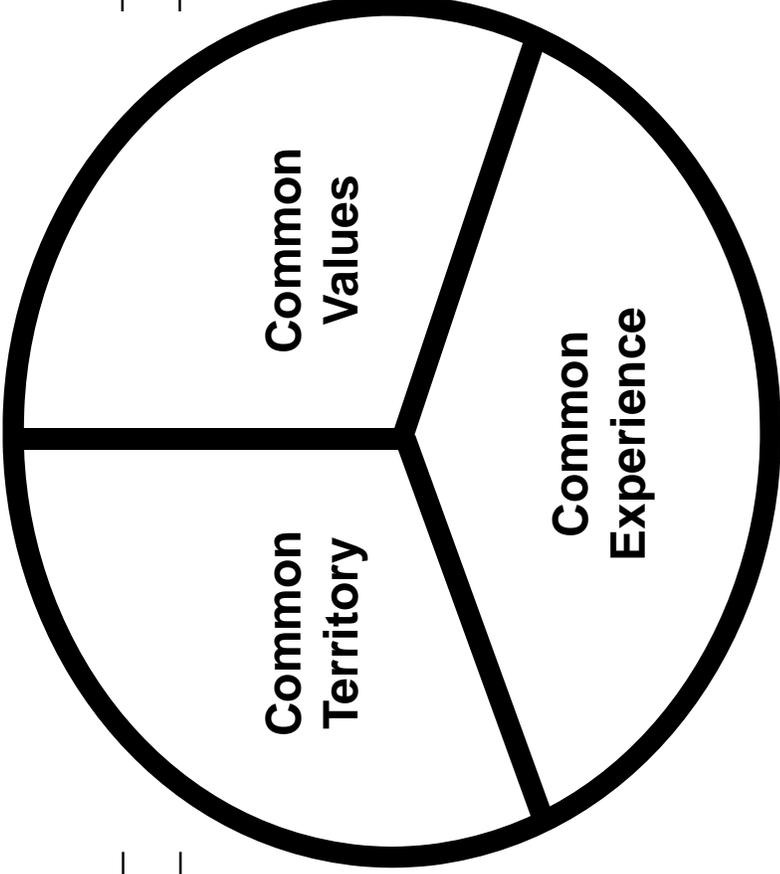
Creating Community

nmca

Creating Community

Common Territory

Common Values



Common Experience

Resident Opportunity & Self Sufficiency Program Action

Goal	To Do	Priority	Again	Again	Who	When	How
	Clarify Goal of Program						
	Handle Myths						
	Build Bridges						
	Finalize Goal of ROSS						
	Activities to Match Grant						
	Design Service Delivery						
	Write ROSS Policy						
	Prepare Work Plan						
	Monitor Grant Performance						
	Review S4S Data Integrity Guide						
	Prepare for HUD Audit						
	Read ROSS NOFO etc.						
	Set Your Professional Goal						
	Network						

Coordinator's Plan

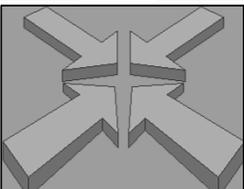


Team Work & Collaboration

Section 11

How Teams Work Stages in Team Building

- **Forming** Polite conversation, little work done, formal rules
- **Storming** Loud, contentious conversation, values clarified, little work being done
- **Norming** Quieter, group rules set, mutual respect, work begins
- **Performing** The real work!



Forming Storming
Norming Performing



Learning Activity 8

- Using the following
 - Describe where your team is now
- Where do you want to see your team in
 - One year
 - Five years
- Write those goals using format




Phases in Team Building

- Forming: Polite conversation, little work done, formal rules
▪ _____
▪ _____
▪ _____
- Storming: Loud, argumentative, values clarified, little work
▪ _____
▪ _____
▪ _____
- Norming: Quieter, group rules set, mutual respect, work begins
▪ _____
▪ _____
▪ _____
- Performing: The real work!
▪ _____

**How Collaborations Work
ROSS-SC Mandate to Coordinate**

- Coordinate and collaborate with a wide range of SS experts including
 - Educators
 - Health professionals
 - Emergency responders & services
 - Employment and job training specialists
 - Welfare reform authorities
- All practitioners become part of ROSS team



Conduct First PCC Meeting

- Carefully develop attendance list
 - Management
 - Staff providers
- Invite-don't commit...see invite
 - Bring agenda, handouts, chart of demographics
- Goals
 - Identify clients and goals in common



Unique Position of Housing Professionals

- Offer creative ideas and programs
 - Intimate, stable relationship w/families in poverty
 - Opportunity to create community
 - Obligation to provide culturally competent services
 - Mandate to coordinate existing services or collaborate w/existing services



Unique Position of Housing

- PHA provides enormous financial support
- Families w/stable housing more likely to succeed at goals than any other group
- Local PHA relationship w/family is longer lasting and closer than any other services
- SC come to know values and attitudes of families
- Translate values to other professionals



Coordinated vs. Collaborative Services

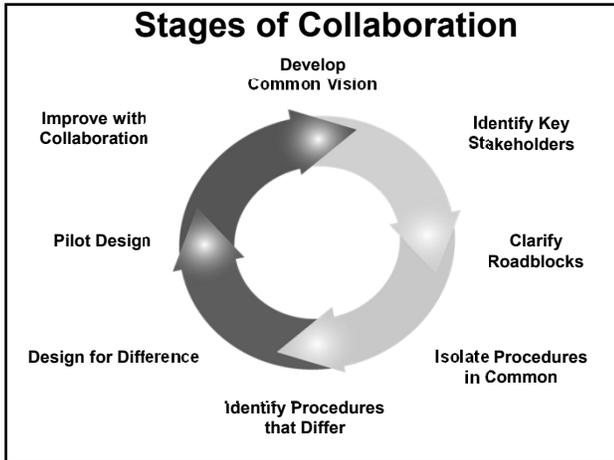
- Cooperative = mutual referrals
- Coordinated = “Synchronized” one before another
 - First service helps participant succeed with second
 - Similar goals, different delivery systems
- Collaborative = Services sharing goals and service delivery to be “seamless”



Stages of Collaboration

- Common vision and goal
- Key people to accomplish goal
- Clarify roadblocks
- Isolate procedures in common - same and different
- Design new services for differences
- Pilot newly designed services & system
- Improve with collaboration





ROSS-SC Collaboration

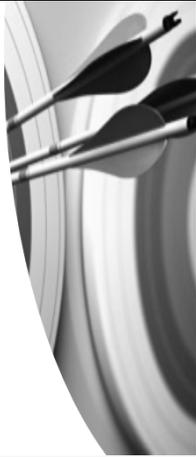
- Ultimately community, teamwork, and collaboration will lead to results
 - Well coordinated activities
 - Thoroughly documented outputs
 - Outcomes that bring positive changes for
 - Residents
 - Agency
 - Community
 - HUD

nmca

Resident Opportunity & Self Sufficiency Program Action							
Goal	To Do	Priority	Again	Again	Who	When	How
	Clarify Goal of Program						
	Handle Myths						
	Build Bridges						
	Finalize Goal of ROSS						
	Activities to Match Grant						
	Design Service Delivery						
	Write ROSS Policy						
	Prepare Work Plan						
	Monitor Grant Performance						
	Review S4S Data Integrity Guide						
	Prepare for HUD Audit						
	Read ROSS NOFO etc.						
	Set Your Professional Goal Network						
	Assess Collaborations						
Coordinator's Plan							

Learning Outcomes

- Know starting ROSS-SC program
- Establish trust with PHA, residents, service partners
- Assess PHA, ROSS clients, ROSS program, and community needs
- Understand collaboration and team building in community partnerships
- Describe best practices in measuring ROSS success



Any Town Housing Authority

Any Town, USA
In Service In Excellence

Dear Resident (Fill in Name):

My name is Patrice Simpson. I have just joined the Riverfront Village Apartments Team at Any Town Housing Authority as Service Coordinator. **I can help you and your family with information about and connection to activities and services in Any Town.**

It's important to The Riverfront Village team and the Any Town Housing Authority that you and your family feel safe, happy, and a part of the community while you live here at Riverfront Village. It's important to me to meet you and your neighbors soon. I want to get your ideas, directly from you, how I can best serve this community.

Please join us to say “Hello”!

Ice cream and Coffee

Village Community Center

Friday Afternoon

3:00 p.m.

or

Saturday Morning

10:00 A.M.

Please feel free to bring family members too!

I'm looking forward to meeting you all!

Patrice Simpson

Service Coordinator

555-555-4321

Any Town Housing Authority

Any Town, USA
In Service In Excellence

Dear Resident (Fill in Name):

Need help finding and keeping high paying jobs? The Any Town Housing Authority has started a new program to help public housing families do just that! The program, **Resident Opportunity and Self Sufficiency ROSS**, could connect you and your family to special services like training for a job; finding a job, child care, and transportation; and a savings account when your wages go up after you start the program. Come find out how it works!

Please join us to learn more about ROSS!

Village Community Center

Friday Afternoon

3:00 p.m.

or

Saturday Morning

10:00 A.M.

Ice cream and Coffee Served

Please feel free to bring family members too!

My name is Patrice Simpson. I am the Service Coordinator for the **Resident Opportunity and Self Sufficiency** program at Any Town Housing Authority. It's important to the Any Town Housing Authority that you and your family receive these special services if you are interested in getting and keeping higher paying jobs. I want to get your ideas, directly from you, how I can best help you do that and serve this community.

I'm looking forward to seeing you all!

Patrice Simpson

Service Coordinator 555-555-4321

Resident Opportunity and Self Sufficiency Interest Card

Yes! I'm interested in the Resident Opportunity & Self Sufficiency Program

- € Call me! I want to sign up as soon as possible!
- € Tell me where the next Orientation Meeting is!
- € Send me an application!

My Name _____

My phone number _____

My Address _____

My Housing Assistant/Specialist is _____

A program of Any Town Housing Authority

555-555-4321

Call for Information

Armando Saved \$15,000 to Buy a Home! You Can Too!



The Family Self Sufficiency Program Gives You...

- Five Years of Help Getting a High Paying Job
- Savings Account – To Use Now or Later
- Extra Help with Child Care and Transportation

Send FSS Interest Card Now!

Program Limited to 25 Families

City of Any Town Housing Authority

Must be Public Housing Family

Resource Guide/Directory Service Provider Information Sheet

Agency/Organization Name: _____

Address: _____

Phone: _____

Fax: _____

Contact Name: _____

Services Provided: _____

Special Requirements/Considerations:

- | | |
|--|---|
| <input type="checkbox"/> Application Needed | <input type="checkbox"/> Flat Fee/Rate |
| <input type="checkbox"/> Limited Service Area | <input type="checkbox"/> Discounts Available |
| <input type="checkbox"/> Sliding Fee Scale | <input type="checkbox"/> Services Provided On-site |
| <input type="checkbox"/> Limited Hours of Availability | <input type="checkbox"/> Services Provided Off-site |

Other: _____

Notes: _____

CONFIDENTIALITY AGREEMENT

Mrs. Smith, as a resident of the Any Town Housing Authority's Beech Gardens and a participant in the Resident Opportunity program it is important for you to know that Any Town Housing Authority, and its employees, will protect your right to confidentiality. Confidentiality means protecting another person's right to privacy.

In order for residents to have trust in the relationship with the Resident Service Coordinator at Any Town's Beech Gardens, it is important for you to know that the information you share with the Resident Service Coordinator **will not** be communicated to anyone without your written release.

A Release of Confidential Information form is used to obtain your permission. A signed form allows the Resident Service Coordinator to discuss your service needs and desires with specific community service providers, family members, physicians, and other individuals in order to link you to programs and services that may benefit you.

As your Resident Service Coordinator, I agree to protect your right to privacy and confidentiality within the ethical and legal limitations of my position and profession. The ethical and/or legal limitations to my promise of confidentiality include:

- **Adult Protection Services:** I am legally and/or ethically obligated to report adults with disabilities who have been subjected to physical abuse, neglect, or exploitation or who are living in hazardous conditions to the Disabled Persons Protection Commission. Likewise, I am legally and ethically obligated to report elder abuse and/or neglect to Protective Services and/or Executive Office of Elder Affairs.
- **Child Protection Services:** I am obligated to report suspected child abuse and/or neglect to Department of Social Services.
- **Police Department:** If I believe a child or elder is in imminent danger, I am obligated to report this to the local police department.
- **Courts:** I may be required by law in a court action to reveal information shared with me or contained within my resident files.
- **Housing Authority:** I have a responsibility to the Any Town Housing Authority, as my employer, and to the community to report lease violations that come to my attention in the course of my duties.

Resident Service Coordinator _____ Date _____

I have read and understand this agreement.

Resident Signature _____ Date _____

Any Town Housing Authority

1234 Main Street, Anytown, USA

Authorization to Release Confidential Information

I, _____, give the Any Town Housing Authority my permission
(Name)

to contact _____, of the _____ agency in order to get
(Job Title) (Agency Name)

or give confidential information regarding my _____ to be used to
(Subject)

(Purpose)

I understand that my signature on this document I give the Any Town Housing

Authority permission to get/give the above stated information from _____,
(Day/Month)

2010 to _____, 2011.
(Day/Month)

(Resident Name) (Date)

(Any Town Representative) (Date)

Individual Training and Services Plan

Name of Participant _____

Social Security Number _____

Final Goal _____

Interim Goal Number _____

Date Accomplished: _____

Activities/Services _____

Responsible Parties _____

Date/s _____

Interim Goal Number _____

Date Accomplished: _____

Activities/Services _____

Responsible Parties _____

Date/s _____

Interim Goal Number _____

Date Accomplished: _____

Activities/Services _____

Responsible Parties _____

Date/s _____

Interim Goal Number _____

Date Accomplished: _____

Activities/Services _____

Responsible Parties _____

Date/s _____

Any Town Housing Authority

Any Town, USA
In Service In Excellence

Dear Colleague:

The Any Town Housing Authority is pleased to announce the implementation of the nationally acclaimed Resident Opportunities and Self Sufficiency (ROSS) Program for families and seniors living in public housing with the Any Town Housing Authority (ATHA).

The Any Town Housing Authority's Resident Opportunities program would like to invite you to the first meeting of its Program Coordinating Committee. As a leader in services to families and seniors, your participation in forming this Resident Opportunities program is vital. The meeting will be:

October 2, 2010
9 A.M. to 10:30 A.M.

Board Room Any Town Housing Authority
1432 The Road of the River Avenue
City of Any Town Housing Authority Boardroom
Any Town, USA 00012

National research demonstrates that agencies working together to serve common clients helps both the families and the agencies to achieve their goals. ROSS adds key services for both families and seniors:

- The ROSS program matches public housing families with the **supportive services** needed to enable them to, not only live independently but to, succeed in the workplace and achieve economic self sufficiency where possible.

Please join us, become a partner, and help identify how we can best help the families enrolled in one or more of our important programs!

RSVP to Sammie Smythe, Executive Director, Any Town Housing Authority
at 1-555-1234 Ext 101.

We're looking forward to working with you!

Sammie Smythe

Executive Director

AGENDA

ANY TOWN HOUSING AUTHORITY FAMILY SELF SUFFICIENCY PROGRAM COORDINATING COMMITTEE MEETING

- 9:00** **Welcome**
Vision & Mission of ROSS Program
Role of Program Coordinating Committee (PCC) Members
- 9:10** **Introductions of Partners**
- 9:20** **Resident Opportunity & Self Sufficiency Program**
Purpose & Goals of ROSS Program
Description of ROSS Families Served
- 9:30** **PCC Partners Programs**
Purpose & Goals of Each Program
Description of PCC Partners Families Served
- 9:50** **PCC Partners**
Brainstorm & Prioritize Common Families Characteristics
Brainstorm & Prioritize Common Goals
Brainstorm & Prioritize Family's Needs
- 10:20** **ROSS Future in This Community**
- 10:30** **Next Steps – Next Meeting**
- 10:45** **Adjourn**
- Handouts**
- **ROSS Requirements Power Points & Notes**
 - **ROSS HUD Report Executive Summary**

**Minutes Resident Opportunity & Self Sufficiency
Program Coordinating Committee Meeting
September 8, 2010**

Present: Director-Meals on Wheel; Clinical Lead-Senior Crisis Team; Division Chief-Adult Protective Services; Senior Service Manager-Area Agency on Aging; Director Senior Community Services -Jewish Community Center

Director-EOPS/TANF Works Community College; Client Services Manager-*AnyTownWorks*; Division Chief-TANF/*AnyTownWorks*; Manager-Central Valley *Worksource* Center; Community Relations Officer-Unified School District Adult & Community Education; Job Developer-Unified School District Adult & Community Education; Vice President Student Services-Mountain Community College

Agenda:

Discussion:

- I. Any Town Housing Authority described the Department of Housing and Urban Development requirements for Resident Opportunity & Self Sufficiency program.
- II. Agencies present discussed and acknowledged that agencies shared clientele and that it would not be difficult to recruit participants from among the agencies clients.
- III. Agencies identified common family characteristics and needs (see Attachment A)

Decisions:

- I. A decision was made to identify staff in each agency that would be in the best position to have and distribute outreach materials. Partners will e mail Any Town with the names and contact information for their staff. Any Town will contact each partner to identify these staff and to arrange for the delivery of outreach materials and a small “script” for staff to use when explaining the ROSS program to their clientele.
- II. A decision was made to pursue a small Program Coordinating Committee case management sub committee in the future. This sub committee, using signed “Authorizations to Release Information” would work with the families to ensure coordinated services.
- III. A decision was made to have the PCC carefully review the demographics of the ROSS clientele, when final enrollment is complete, to further identify the ways in which the PCC partner agencies can best serve them.
- IV. A decision was made to negotiate a Memoranda of Understanding amongst Any Town Housing Authority; Adult Protective Services Senior Crisis Team, and Area Agency on Aging that details steps to be taken to reduce intake roadblocks and regulatory barriers in providing services to elderly and disabled residents in ROSS programs.

**Minutes Resident Opportunity & Self Sufficiency
Program Coordinating Committee Meeting
September 8, 2010**

- V. A decision was made to further discuss Any Town Adult Education's Life Skills classes and Mountain College and Mountain Community College Equal Opportunity Program's Academies as a possible starting point for assessment and planning activities for FSS families.

- VI. An agreement was reached for Any Town Housing Authority and Department of Health and Human Services to investigate further opportunities for a mutual agreement to share data and database information on mutual clientele. Any Town will forward HUD's boiler plate for Memoranda of Agreement between Housing Authorities and local DHHS TANF offices for this purpose.

Follow Up:

- I. Develop ROSS outreach procedures with each ROSS partner agency.

- II. Pursue discussions with Any Town Adult Education, Mountain College and Mountain Community College Equal Opportunity Program Academies, and Any Town Works about initial formal vocational assessment and planning services for ROSS families.

- III. The next meeting of the Any Town Housing Authority's ROSS PCC will be held in October 2010.

LINKAGE AGREEMENT**

This linkage agreement dated October 1, 2010, is made and entered into by the **Any Town Housing Authority** and **Any Town Works Collaborative** hereinafter referred to as **ATW Collaborative**.

The purpose of this Linkage Agreement is to describe the cooperative relationships, services and activities between the **Any Town Housing Authority** and the **ATW Collaborative**. This coordination is designed to fully utilize the expertise and resources of each agency so that **WIA** eligible participants who are also public housing residents will be well served.

SECTION I: ELEMENTS OF SERVICE

In an effort to ensure that Any Town families complete training and maintain stable long-term employment the Any Town Housing Authority agrees to provide, as able, the following elements of services to WIA and Housing eligible families:

1. Housing Assistance - The Any Town Housing Authority has available housing to serve participants who meet all eligibility and suitability requirements including completion of application and all priorities that take them from the waiting list to available housing.
2. Service Coordination - The Any Town Housing Authority has qualified staff that provide service coordination services to qualified referred participants.

The ATW Collaborative will provide the following elements of service to 15 families who are ATW applicants referred by the Any Town Housing Authority who are assessed by ATW Collaborative and determined suitable for training. Each family will receive:

1. *Program Orientation* - ATW Collaborative case managers will provide a presentation of all training programs offered by ATW Collaborative. Labor Market Information will be given to referrals indicating growth, career advancement opportunities and salary range.
2. *Post Assessment* - ATW Collaborative case manager will assess interested applicants using a battery of assessment tools to determine suitability and appropriateness.
3. *Basic Education Skills* - ATW Collaborative and collaborative partners will provide concurrent basic skills for those referred who are tested below a 8.9 grade level. These skills are reading, writing, math and proper English grammar.
4. *VESL* - ATW Collaborative VESL instructor will provide Vocational English as a Second Language to those limited English speakers who are tested at 5th grade level.

****Linkage Agreements are legally binding documents and should only be negotiated with the explicit approval of legal counsel and Board approval.**

LINKAGE AGREEMENT**

5. *Work Readiness Skills* - ATW Collaborative will provide to referrals from ATHA a minimum of 40 hours of work preparation that includes resume writing, interviewing techniques, career planning, interpreting labor market information and completing job applications. All these components are to develop critical thinking skills, interpersonal skills, use of computers in resume writing and self-esteem.
6. *Occupation - Skills Training* - ATW Collaborative industry experienced instructors will provide skills training in an *Internships & OJT* work simulated environment. ATW partner agency employment staff will develop OJT's, subsidized and employer paid internships.
7. *Job Placement* - ATW Collaborative and partner job placement specialists will assist by setting up interviews, appointments, and company physicals. One-on-one interviews will be provided by the employment specialist.
8. *1 year Follow-up* - ATW Collaborative will monitor the employment status and progress of each participant referred at 30, and 90 days of employment. Assistance will be provided for re-placement if necessary.

SECTION II. TOTAL COST VALUE OF SERVICES PROVIDED

The Any Town Housing Authority will provide a \$68,000 worth of service coordination services specified in Section I for a minimum of 50 participants enrolled in the ATW Collaborative.

The ATW Collaborative will provide a total of at least \$60,000 worth of services specified in Section I to referred and enrolled participants.

- Basic Education Skills classes are valued at \$200 per class per person
- VESL is valued at \$300 per class per person
- One cycle of Work Readiness Skills is valued at \$400 per person
- Occupation –Skills Training is valued at \$300 per person
- Job Placement is valued at \$500 per placement
- One year of Follow-Up is valued at \$200 per person

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LINKAGE AGREEMENT**

SECTION III. MODIFICATION AND CANCELLATION

This Linkage Agreement may be modified by mutual agreement of both parties. Cancellation requires 30 day written notice from canceling partner to this agreement.

This agreement is effective October 1, 2010 and shall remain in effect until canceled by either party.

Any Town Housing Authority

Any Town Works Collaborative

Blanca Vega
Manager Resident Services &
Property Management

Sammie Smithye
President

Sample

****Linkage Agreements are legally binding documents and should only be negotiated with the explicit approval of legal counsel and Board approval.**

SUB-CONTRACT**

This sub-contract (Contract) for the _____ Program funded by the _____ is entered into this ____ day of _____, ____ by and between the Any Town Housing Authority, herein called the "ATHA" and the _____, herein called the "PARTNER" who agreed to provide the described services in the _____ Grant (Attachment A) with Grant Number _____ in accordance with the grant requirements.

1. Compliance with Regulations

PARTNER shall comply with all regulations specified in the assurances and certification statements required by the grant (See attached copy of grant).

2. Reports of Services Rendered

PARTNER agrees to provide ATHA reports of services rendered as required by the _____ and the ATHA, acting as fiscal agent.

3. Period of Agreement

This Agreement shall be effective from _____ until _____.

4. Compensation

ATHA will pay PARTNER \$_____ for: [*services, equipment, site*] _____, _____, and _____. Payment will be made upon presentation of appropriate invoice (s) by PARTNER. If the [*funding source*] _____ does not fully fund _____, a proportional adjustment will be made to this Agreement.

5. Renewal

This Agreement will be renewable for the period commencing _____ and ending _____, pending allocation of funds for the [*fiscal year*] _____ year from the [*funding source*] _____.

6. Confidentiality

The identity of participants who are economically disadvantaged is to remain confidential. PARTNER assumes responsibility for maintaining the confidentiality of individual participant records.

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SUB-CONTRACT**

7. Audit

PARTNER agrees to maintain and preserve, until five years after termination of the Agreement with ATHA and to permit the ATHA or any of its duty authorized representatives, to have access to and to examine and audit any pertinent books, documents, papers, and records related to this Agreement.

8. Contact Persons

The contact person for ATHA shall be:

The contact person for the PARTNER shall be:

9. Termination.

This Agreement may be terminated by either party 30 days after written notice to the Contact Person specified above.

10. Independent Contractor.

It is expressly understood that at all times while rendering the services described herein, and in complying with any terms and conditions of this Agreement, PARTNER is acting as an independent entity and not as an officer, agent, or employee of the Any Town Housing Authority.

11. Compliance with Law

PARTNER shall be subject to and shall comply with all Federal, State, and local laws and regulations applicable with respect to its performance under this contract including but not limited to, licensing, employment and purchasing practices and wages, hours and conditions of employment, including nondiscrimination.

12. Insurance Requirements

During the term of this Agreement, PARTNER agrees to keep in full force and affect such insurance as required by state law, including, but not limited to, workers compensation, general liability insurance, and automobile liability insurance.

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SUB-CONTRACT**

13. Entire Agreement

This Agreement represents the entire Agreement and understanding of the parties hereto and no prior writings, conversations, or representation of any nature shall be deemed to vary the provisions hereof. This agreement may not be amended in any way, except by writing duly executed by all signatories hereto.

14. Indemnification

- (a) The PARTNER shall be responsible for all injuries to persons and for all damages to real or personal property of the AUTHORITY or others, caused by or resulting from the negligence of itself, its employees, or its agents during the progress of or connected with the rendition of services hereunder.
- (b) PARTNER shall indemnify and hold harmless the AUTHORITY, the Housing Authority of the City of Any Town, the City of Any Town, and all officers and employees of each agency from any and all liability, claims, costs (including reasonable attorney's fees):
 - (1) For damages to real or personal property, or personal injury to any third party resulting from the negligence of PARTNER, its employees or its agents; or
 - (2) For any breach of any obligations, duties or covenants of PARTNER under this Agreement or transactions related to it.

IN WITNESS WHEREOF, the parties hereto have caused this agreement to be duly executed, such parties acting by their representative being thereunto duly authorized.

PARTNER

ANY TOWN HOUSING AUTHORITY

By (Authorized Signature)

By (Authorized Signature)

Name (Type or Print)

Name (Type or Print)

Executive Director

Title

Executive Director

Title

Date

Date

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Activities of Daily Living

This document provides a comparison of activities of daily living and related support services for Participants who demonstrate a need for assistance with completing one or more activities.

