

Housing Based Case Management

Michigan Balance of State Continuum of Care

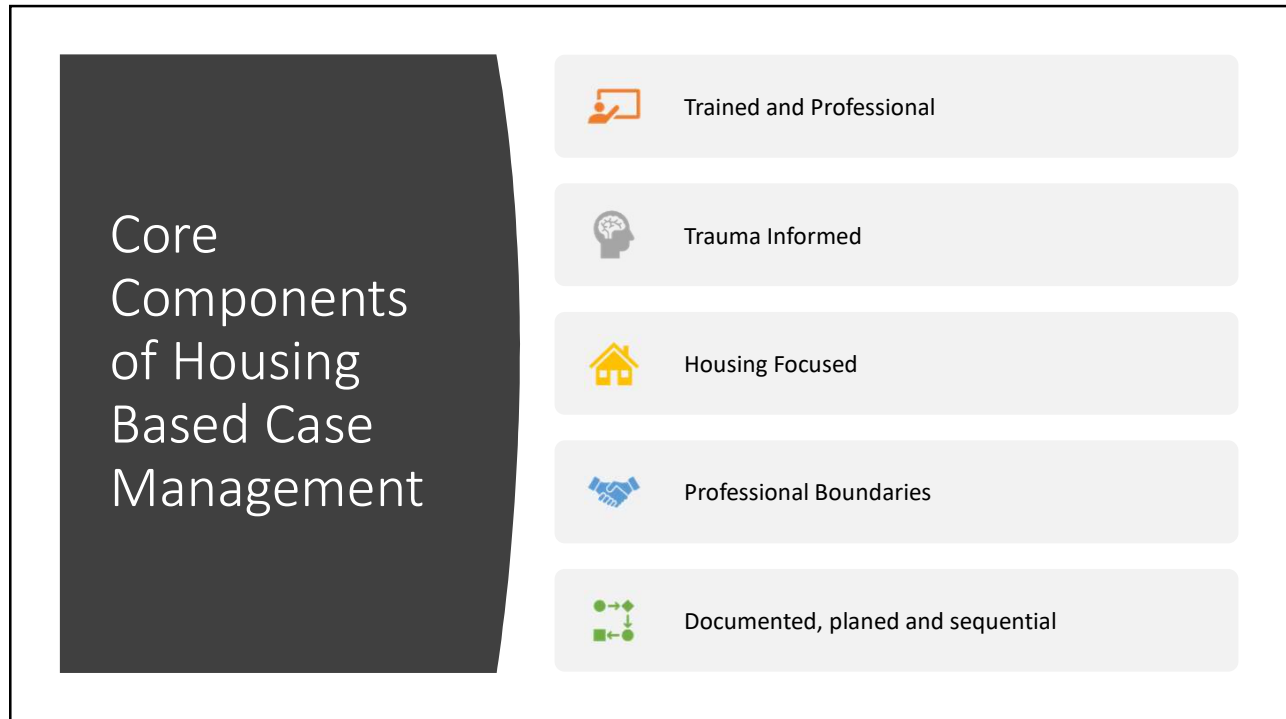
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Training Outline

1. Core Components of Housing Based Case Management
2. Moving In
3. Meaningful Daily Activities
4. Productive Home Visits
5. Forms and Tools to Use*
 1. Honest Monthly Budget
 2. Crisis Plan
 3. Guest Policy
 4. First Case Plan (in housing)
6. Exit Planning*
7. Quality of Life Survey*

*Using content from Org Code Consulting, Inc

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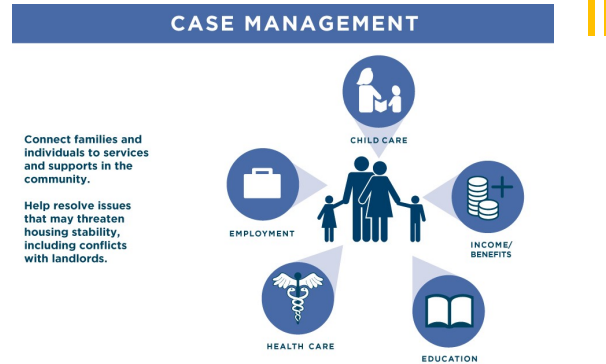
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Case Management

- The goal of **housing based case management** is to help stabilize people once housed, by connecting them to services and supports if needed. It should focus on helping people navigate barriers that may stand in the way of securing and maintaining housing, and should also strive to build a support system by connecting them with people and programs in the community.
- Rapid re-housing **assistance should end** and the case closed when the individual or family is no longer facing the threat of homelessness, but **case management may continue** if appropriate or requested.



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People do NOT have to complete any mandatory programming prior to moving into housing

People do NOT need to have a source of income prior to moving into housing

People do NOT have to be sober prior to moving into housing

People do NOT have to graduate from transitional housing to be considered for housing

People receive supports based upon acuity levels and presenting issues

Services are delivered in the person's home, not an office

Each person has an INDIVIDUALIZED service plan

If people lose their housing they do not lose their supports

If people lose their housing re-housing them is seen as an immediate priority

People are not punished for making "mistakes" or losing their housing

People do NOT have to participate in mental health programming

Caseloads do not exceed 20 for Housing First and 35 for Rapid Re-Housing

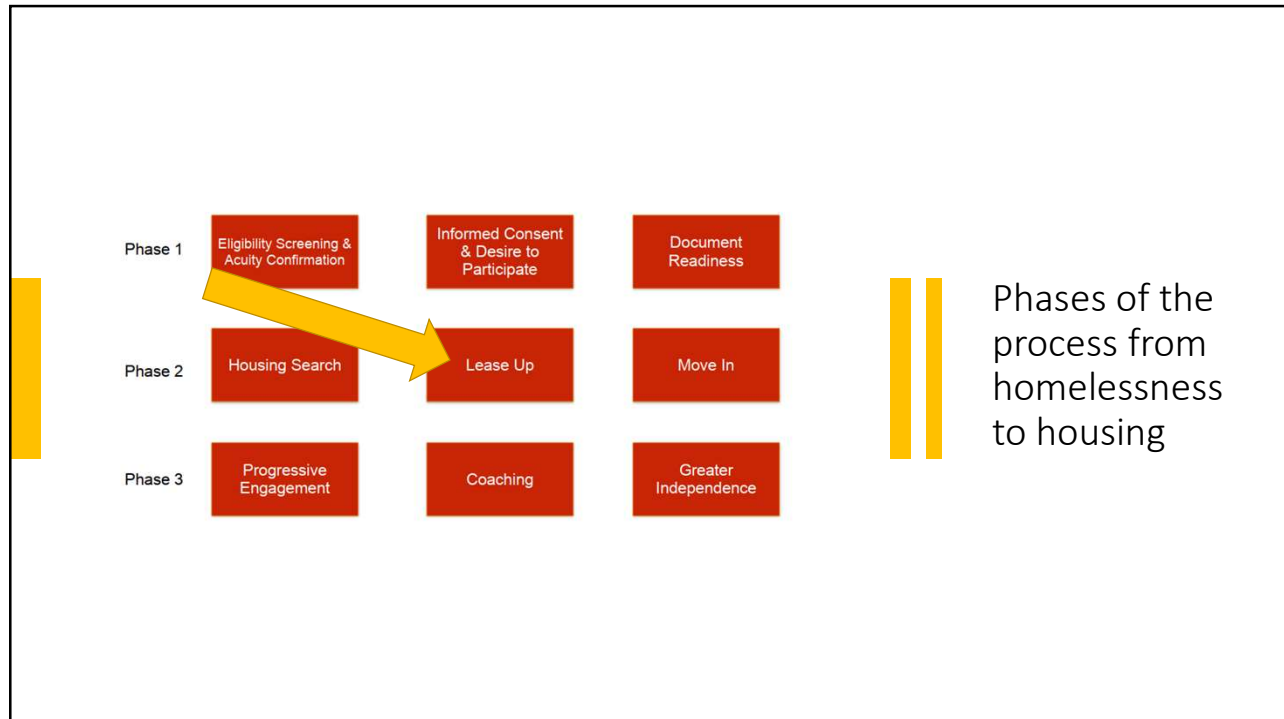
Participants are prioritized for participation based upon acuity

People exit the program once housing and life stability are achieved

There is no intention to "heal" or "fix" people

Support workers do not act like crisis workers

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Once you are matched with a program participant ...

- Talk about what housing search will look like. Who's doing what and parameters for rentals.
- Ask them to describe what they think case management supports will look like.
- For Rapid Rehousing programs, ask them what they think is the least amount of assistance they will need? (financial assistance)
- Ensure they are comfortable with home visits. Explain what that could look like.
- Let them know that your primary focus will be on **housing stability**.
- Ask them what they think it means to be a responsible tenant.

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Progressive Engagement Basics

Progressive Engagement is the practice of helping households end their homelessness as rapidly as possible, despite barriers, with minimal financial and support resources. More supports are applied to those households who struggle to stabilize. It doesn't depend on a "number" or "score" to determine what a household needs.

Progressive engagement recognizes that there is no way to accurately predict how much help someone may need to end their homelessness and avoid a return to the streets or shelter

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- **Avoids false assumptions:** people who are very poor and may be disabled – including those who score high on assessment tools –do not all need or want more intensive or longer-term assistance. People who initially appear to need more may end up needing less – and vis-versa.
- **Individualization:** when a participant shows s/he needs more help, more help can be provided. Programs should offer the right amount of assistance for the right amount of time to meet individual needs.
- **Efficiency:** by avoiding more assistance than is required to end homelessness and prevent an immediate return to streets or shelter, programs can help more people, close housing placement gaps, and reduce the time people remain homeless.
- **Effectiveness:** programs that use Progressive Engagement show high rates of success serving people with a wide range of needs. Programs take risks, frequently must make tough decisions, and assume some will fail – meaning the program may need to do something different if they help the same participant again.

Providing the *Right Intervention* at the *Right Time*

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In a Nutshell: Structuring the Financial and Case Management Assistance

Initially provide basic amount of assistance

Periodically assess path to self-sufficiency

Determine whether to extend assistance

Extend assistance as needed; proactive case management

Determine when another intervention is needed

NAEH 2015

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Next up...
Moving In

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For housing to
be considered

- Must meet Housing Quality Standards inspection --- depends on program, what inspection is required.
- Lease must be in place. Terms depend on program.
- Housing that is permanent
- Client has privacy and controls access to his/her unit.
- Must meet FMR or rent reasonableness. Terms depend on program

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Define your program and role with the landlord and the tenant

- A liaison; not a “mini-landlord”
- Will provide in-home services depending on acuity and need
- Provide contact info as well as HOW and WHY to contact you
- Ensure landlord knows what info you can share and what is private
- Work to mediate issues

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House participants using these best practices

- Only do move-ins on Mondays, Tuesdays or Wednesdays
- Usually only do 1 move in per day
- Discuss/role play the move-in before it happens
- Pick out furniture in advance
- Client accompanies you to ALL apt. showings
- Client is assisted with lease signing

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On the day of move in



Do a walk through of the unit.
Assist client in completing
damage assessment



Review building orientation
and fire safety with client



Make sure locks and keys
work; discuss strategies for lost
keys



Who to call when and crisis
plan

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Lease signing and review

- Important to review lease with the landlord and the program participant
- Make a copy, use a highlighter
- Always come back to the lease and always be asking ... how do you think this might impact your housing?

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Ways to promote homemaking

Buy a baking sheet
and make cookies.

Provide them a
plant.

Give them three
picture frames.

Get sticky putty to
put posters on the
wall.

Go grocery shopping
and make bulk
meals.

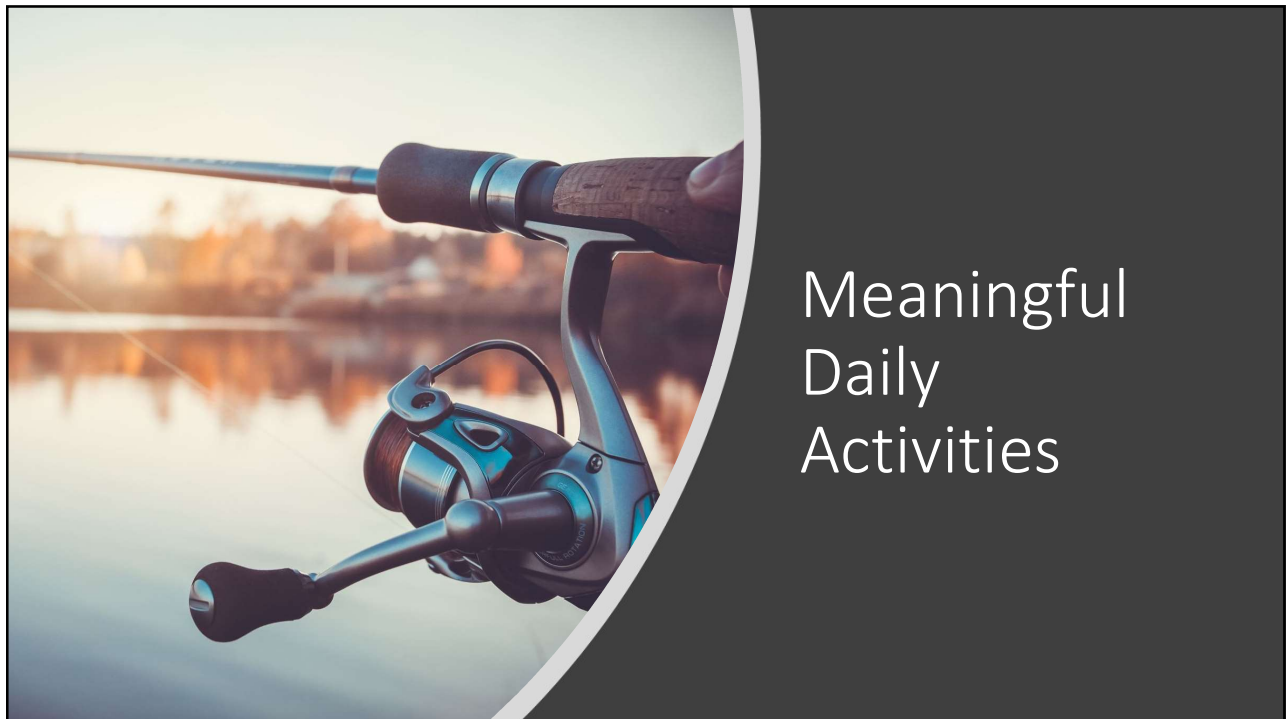
Activities to address
boredom...cards, art
supplies, books, tv,
laptop, etc.

Calendar

Fridge magnets

Dry-erase marker

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Meaningful
Daily
Activities

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Meaningful Daily Activities

- "A Week of Meaningful Things to Do" is a tool that Intensive Case Managers can use when delivering Housing First to help clients focus beyond the present moment.
- To get clients to focus not just on those appointments related to the case plan (for example, dates and times you intend to visit; doctor's appointments; meetings with an employer or welfare, etc.) but also activities that they can engage with outside of those appointment times to reduce social isolation, increase community integration, and (re)build social networks;
- To help clients reflect on those activities that are the best part of their day and those parts where things could have been better.

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EXCELLENCE IN HOUSING
A Week of Meaningful Activities

Client: **Jim** Version: **3** Date: **Aug 23**

Days of the Week:	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Morning	Appointments: Eye doctor 10:30am Other things I plan to do:	Appointments: Other things I plan to do: Binning @ downtown	Appointments: Other things I plan to do: Go to library	Appointments: Other things I plan to do: Binning @ east side	Appointments: Work on resume @ job center Other things I plan to do:	Appointments: Other things I plan to do: Lunch @ George's	Appointments: Other things I plan to do: Church
Afternoon	Appointments: Other things I plan to do: Go to park	Appointments: Case worker 2pm Other things I plan to do: Nap	Appointments: Other things I plan to do: Read	Appointments: Case worker 2pm Other things I plan to do: Nap	Appointments: Other things I plan to do: Drop off resume	Appointments: Other things I plan to do: Go to park	Appointments: Other things I plan to do: Read
Evening	Things I plan to do: Watch TV	Things I plan to do: Call Cathy	Things I plan to do: Call Cathy	Things I plan to do: AA Meeting	Things I plan to do: Movie @ community center	Things I plan to do:	Things I plan to do: Call Cathy
What was the best thing about the day?	Playing with dog in park	Cathy made spaghetti	Found a good book	Good \$\$ this morning	Star Wars	Lasagna!	Good book
What could have been better about the day?	Doctor says I need glasses	Didn't make a lot of \$\$	Couldnt reach Cathy	Shouldnt have hit Phil	I hate being unemployed	Park was boring	Dont really like church

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1. Suggest and promote the tool and its benefits to the client;
2. Explain how the tool works;
3. Use open-ended questions related to activity suggestions for the client to consider. Activities should include those things that would provide the client fulfillment physically, intellectually, spiritually, socially, emotionally and/or recreationally. You may want to use prompts like "What is a physical exercise or sport you'd like to do this week and when do you want to do it?"
4. Know when some specific events are occurring in the community that you can offer as suggestions for them to respond to such as "There is a fall fair on Saturday that is free and has a band coming on at 6pm. What do you think about that?" or "On Tuesday mornings there is coffee club at the Kinsmen Recreation Centre where seniors meet up. How do you feel about doing that and meeting up with some other seniors in your neighborhood?" or "The Running Room has free group runs on Wednesday evenings and Sunday mornings. What do you say to strapping on your running shoes and trying one or both of those runs next week?";
5. Try to encourage the client to come up with at least one activity each morning, afternoon and evening;
6. De-brief the tool with the client, preferably on the afternoon of the 7th day it is used;

How to use the meaningful daily activities tool

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Productive Home Visits

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Setting the tone for productive home visits

- Ask TV, radio, etc. to be turned off
- Ask them to hold non-urgent calls and texts. And leave your own phone alone!
- Ask that there be no guests during visits
- Be on time & stay on time
- It's okay to acknowledge, "I know this may be hard for you..."
- It's okay to note discrepancies and establish an honest environment
- Be present...listen...embracing the silence and awkward pauses
- Embrace your role as a change agent in your tone

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More tips for productive home visits

- At the start and about half way through, remind them of the amount of time for the visit.
- Ask probing questions.
- Use motivational interviewing techniques.
- Use active language.
- NEVER provide advice.
- Manage your own time (4-6 HF, 5-8 RRH)
- Manage your safety.
- Avoid idle chit-chat

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Adding structure to a home visit

- Hi (name) it's good to see you today. We have about X minutes for our visit today. As we talked about on (date of last visit) we agreed we would talk about:

- A.
- B.
- C.

At the end of dealing with those objectives for today we will select some objectives for our next visit.

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End of the home visit



Summarize what was discussed and accomplished during the visit.



Establish objectives for between visits.



Establish objectives for next visit.



Note on the calendar the date and time of the next visit.



Find something positive to acknowledge...however small.

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Before you leave

Ask them 3 things they think might go wrong in the first few days and help them plan for what they will do if they happen so that they stay in their place.

Ask them 3 things they were GREAT at the last time they had successful housing.

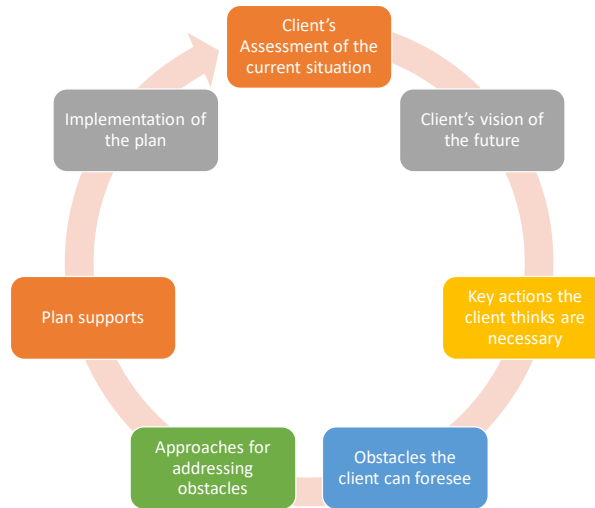
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-Always be asking

How do you think this will impact your housing?

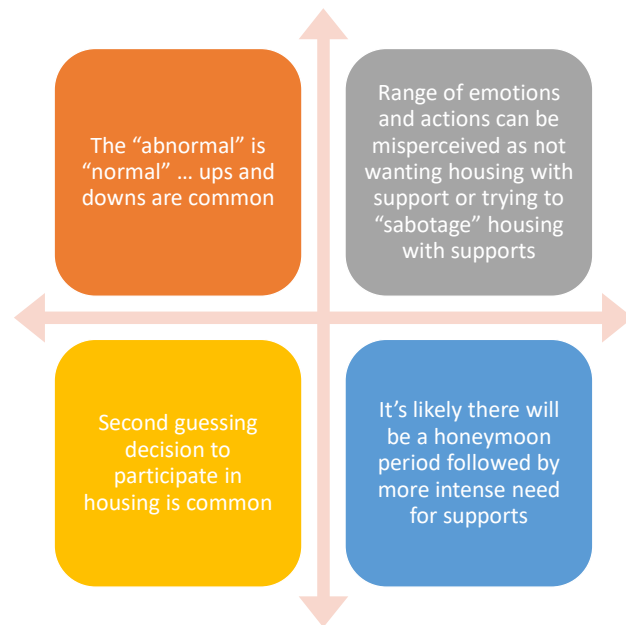
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The process of setting goals around supports




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The first month of housing




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5 necessary functions in the 1st month





1. Crisis Plan
2. Budget
3. First Case Plan
4. SPDAT
5. Personal Guest Policy



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Crisis Plan

A tool for proactively preparing people for possible crises in their lives, and ensuring they have an active voice in the care that ensues – as best as possible.

-  Normalize it
-  Completed within the first 2 weeks
-  Updated again as necessary
-  Final update is a program exit

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EXCELLENCE IN HOUSING
Crisis Plan Sample

Client: Frank Version: 1 Date: August 4

About Me

Name:	Francis McNeill
Date of Birth:	June, 1969
Address:	8 Fairview Ave.
Health Card Number/Version:	555-555-1234

Emergency/Medical Contacts

Role	Name	Telephone Number
Emergency	Emergency Services	9-1-1
Contact this person 1st	Erica McNeill (Sister)	555-555-9976
Contact this person 2nd	Rob Sawborzak (Boss)	555-555-1111
Contact this person 3rd	Melissa Harten	555-555-2419
Support Worker	Rudolph Miller	555-555-6431
Support Worker Back-up or Team Leader	Rachel Domino	555-555-9787

Depending on the situation, I may also use these community resources when in crisis:

Name of Community Resource	Telephone Number
Grants4u Anonymous	555-555-0009
Mental health hotline	555-555-3636

Understanding or Managing a Crisis

The signs that I am about to go into crisis are: Money is tight and I start watching paper online. Start talking about my system.

The signs that I am in crisis are: I ask people for money and make up lame stories about why I need it. I disappear for hours and don't tell anyone where I've been. I fail to show for any reason.

If you notice I am doing and/or saying: talking about how something is bad for me then give me space.

In the past, to deal with a crisis effectively, I have: Gone to meetings. Also just finding something else to do, maybe movies or a long walk (as long as I don't bring any money with me).

If I am in crisis, it is best to contact these people: Erica, because she can usually talk sense into me. My boss because I might totally flake out on work. Melissa, because sometimes it's her fault.

If I am about to be in crisis or I am in crisis, these are the special arrangements or things I need to have taken care of for me: Call my boss and tell him I'm sick. Erica has power of attorney so she can put a freeze on my bank account. Pay the landlord next month's rent immediately so I don't get evicted.

In the event of a crisis I would like my crisis plan shared with my support network, as deemed appropriate by my worker:
 Yes No

Client: Frank McNeill Date: August 4, 2014

Intensive Case Manager: Rudolph Miller Date: August 4, 2014

Crisis Plan
(Org Code)

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Crisis Planning Tool

About Me

Name:	
Date of Birth:	
Address:	
Health Card Number/Version:	

Emergency/Medical Contacts

Role	Name	Telephone Number
Emergency	Emergency Services	9-1-1
Contact this person 1st		
Contact this person 2nd		
Contact this person 3rd		
Support Worker		
Support Worker Back-up or Team Leader		

Depending on the situation, I may also use these community resources when in crisis:

Name of Community Resource	Telephone Number

The signs that I am about to go into crisis are: _____

The signs that I am in crisis are: _____

If you notice I am doing and/or saying _____ then give me space.

In the past, to deal with a crisis effectively, I have: _____

If I am in crisis, it is best to contact these people: _____

If I am about to be in crisis or I am in crisis, these are the special arrangements or things I need to have taken care of for me: _____

In the event of a crisis I would like my crisis plan shared with my support network, as deemed appropriate by my worker:
 Yes No

Client: _____ Date: _____

Crisis
planning
tool
(OrgCode)

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Honest Monthly Budget

A tool for helping formerly homeless people with moderate and higher acuity think about money management in a pragmatic, non-judgmental manner.

Formal and informal income

Sets the stage for honesty and openness

Updated again as necessary

Final update at program exit

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Honest monthly budget (OrgCode)

- Important to raise awareness, NOT an opportunity to pass judgement on how people spend or access money.

EXCELLENCE IN HOUSING

The Honest Monthly Budget Sample

Client: Chris	Version: 1	Date: February 6
Things that I have to spend money on:		
Rent	\$604	
Utilities	\$0	
Food	\$100	
Arrears	\$300	
Repairs	\$0	
TOTAL	\$1,004	
Formal ways I get money:		
Job	\$0	
General Welfare	\$781	
Disability	\$0	
Pension	\$0	
Inheritance	\$0	
TOTAL	\$781	
Other money that comes in goes toward:		
Child Support	\$0	
Debts	\$50	
Cigarettes	\$100	
Coffee	\$0	
Alcohol	\$200	
Other Drugs	\$0	
Health Stuff	\$30	
Household Supplies	\$60	
Girlfriend/Boyfriend	\$0	
Kids	\$0	
Other Friends	\$50	
Cable	\$0	
Socializing/Partying/Night Out	\$20	
Sex	\$0	
Bus	\$10	
Taxis	\$0	
Gambling	\$0	
Legal Stuff/Fines	\$0	
Other Bills	\$0	
TOTAL	\$620	
Informal ways I get money:		
Binning/Bottle Collecting	\$100	
Odd Jobs	\$75	
Treasure Hunting	\$0	
Baby Sitting	\$0	
Sex Work	\$0	
Drug Running/Dealing	\$0	
Day Labour	\$200	
Theft/Pawning	\$150	
Friends/Family	\$0	
Selling Prescription	\$0	
Gambling	\$0	
Medical Research	\$0	
Panhandling	\$60	
Selling Crafts	\$0	
Busking/Street Entertainment	\$0	
Honorariums	\$0	
Non-Medical Research	\$0	
Other	\$0	
TOTAL	\$688	
All the Ways I Spend Money:		
GRAND TOTAL	\$1,624	
All the Ways I Make Money:		
GRAND TOTAL	\$1,366	
Difference Between What I Spend and What I Make: -\$258		

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First case plan

-  First time to demonstrate SMART goal setting (Specific, Measurable, Attainable, Relevant, Time-Based)
-  No more than 3 areas of attention
-  All 3 areas related to housing stability

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SPDAT (full version)

- Service Prioritization Decision Assistance Tool

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Personal Guest Policy

The idea should be introduced during the housing search, discussed during the move-in, and completed during the first two home visits. This tool is intended to help the client define who can visit, when, and who is responsible for the actions of guests.

Intent is to help the participants define who can visit, when, and who is responsible for the actions of guests.

Ideally should be introduced during the housing search, discussed during move-in, and completed during the first 2 home visits.

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Questions to inform the guest policy

EXCELLENCE IN HOUSING
Guest Policy Sample
 Client: Fiona Version: 1 Date: Jan 4, 2013

My Personal Guest Policy

In general, my visiting hours are:

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Guests ARE allowed	9-9	9-9	11-9	9-9	after 9am	all day	
Guests are NOT allowed	after 9pm	after 9pm	after 9pm	after 9pm			all day

I make exceptions for the following people:

Name	Is allowed to visit:
<u>Shella (mom)</u>	<input checked="" type="checkbox"/> Always <input type="checkbox"/> Never <input type="checkbox"/> Other: _____
<u>Frank (dad)</u>	<input type="checkbox"/> Always <input type="checkbox"/> Never <input checked="" type="checkbox"/> Other: <u>only on weekends</u>
<u>Candy</u>	<input checked="" type="checkbox"/> Always <input type="checkbox"/> Never <input type="checkbox"/> Other: _____
<u>Eric</u>	<input type="checkbox"/> Always <input checked="" type="checkbox"/> Never <input type="checkbox"/> Other: _____
_____	<input type="checkbox"/> Always <input type="checkbox"/> Never <input type="checkbox"/> Other: _____
_____	<input type="checkbox"/> Always <input type="checkbox"/> Never <input type="checkbox"/> Other: _____
_____	<input type="checkbox"/> Always <input type="checkbox"/> Never <input type="checkbox"/> Other: _____

These are my house rules:

No drugs in my apartment! Don't bring people over that I don't know and no one can be in my apartment when I'm not home. TV volume doesn't go up past 40, and if you're being louder than that, you're too loud!

Here's how I will deal with things if someone breaks my house rules:

First I will remind them of the rule, and suggest that they stop or leave. If that doesn't work, I will suggest that we all leave. If that still doesn't work, I will call the security desk. The next day, I will speak to my neighbours/landlord if necessary.

Here's why having and following a guest policy is important to me:

Last time I got evicted was because Eric was shooting up in my bathroom when the cops showed up. Now I know that I can be held responsible for what my friends do in my place.

- What time of day do you want to allow guests (or not allow guests)?
- Is there anyone that you don't want at your unit (even though you may hang out with them somewhere else)?
- Is there anybody you'd only invite over on certain days or certain times?
- If someone comes over with a friend, and you don't know the person, is that alright with you?
- If a guest damages something in the building or your unit, who is responsible?
- If people want to crash on your floor or couch, is that cool with you? What if doing so is against your lease?
- How will you make sure there are no compliants!

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Exit Planning

Tool for helping prepare individuals and families that have been part of support programs in decreasing and then ceasing their involvement with the supports, while promoting ongoing housing stability.

Plan to maintain housing

Skills assessment

Risk assessment

Support network

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EXCELLENCE IN HOUSING

Exit Planning

Client:	Version:	Date:
---------	----------	-------

About Us

Family Name:	
Head(s) of Household:	
Address:	
Health Insurance	

Emergency/Medical Contacts

Role/Relationship	Name	Telephone Number
Emergency	Emergency Services	9-1-1
1.		
2.		
3.		

Exit Planning

(OrgCode)

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Our Plan to Maintain Housing
 I will continue to **pay our rent** by making sure we do the following things:

I will make sure that **we don't get kicked out of the apartment** by doing/not doing the following things:

We are **ready to live with greater independence** and without Housing Program supports because:

Exit planning cont.

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If our housing is becoming unstable **we will:**

Signs our housing is unstable are:

If our housing is unstable **we will:**

The areas in our life that **we are still working on are:**

We are going to **work on these areas by:**

Signs that our housing is becoming unstable are:

Exit planning cont.

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We are confident that we have the skills to:

Task	Yes	No	N/A
Clean the apartment	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Go grocery shopping	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Pay rent	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Speak with landlord	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Do laundry	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Budget	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Pay other bills	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Be responsible tenants	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Set goals & take action	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Problem-solve with a level head	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Keep emotions in check when frustrated/angry	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Follow crisis plan when necessary	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Make appointments and keep them	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Follow doctor instructions	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A
Follow psychiatrist instructions	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A
Take medicine	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A
Refill medicine	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A
Have fun without creating problems	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Fill the days with things that make us happy	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Invite guests over and know when to ask them to leave	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Seek out help when we need it	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Keep our apartment	<input type="checkbox"/> Yes	<input type="checkbox"/> No	

Exit planning cont.

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Our Support Network

The following people are considered to be part of my support network, and we recognize that our Housing Program support worker will no longer be part of my support network:

Role/Relationship	Name	Telephone Number

Should we ever receive an eviction notice or be told by my landlord that we need to leave, we will:

We would like our exit plan shared with our support network and other social service organizations, as deemed appropriate by my worker.

Exit Planning cont.

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Compared to when you were homeless, since you have been housed has:	Improved	Stayed the same	Gotten worse
The amount you sleep...	+	=	-
Your stress level...	+	=	-
Your outlook on life...	+	=	-
Your physical health...	+	=	-
The amount of food you eat...	+	=	-
The quality of food you eat...	+	=	-
Your friendships or relationships with family...	+	=	-
The quality of food you eat...	+	=	-
Your overall mental health...	+	=	-
How you feel about the future...	+	=	-
Your happiness...	+	=	-
Your safety...	+	=	-

The next questions are about certain behaviors, comparing when you were homeless to now that you are housed.

Circle **N/A** if it didn't happen when you were homeless and it hasn't happened since you were housed.

Compared to when you were homeless, since you have been housed has:	Gone down	Stayed the same	Gone up	N/A
The number of interactions with police...	-	=	+	N/A
The number of ambulance rides to hospital...	-	=	+	N/A
The number of visits to the emergency room at the hospital...	-	=	+	N/A
The amount that you drink...	-	=	+	N/A
The number of nights in jail...	-	=	+	N/A
The amount of drugs that you use...	-	=	+	N/A
How frequently you get high...	-	=	+	N/A
The number of different admissions in hospital...	-	=	+	N/A
The length of time spent in hospital...	-	=	+	N/A

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Quality of Life Survey

- There are two sets of questions in the survey. In the first set of questions, we want to better understand changes to your quality of life since becoming housed. The second set of questions we want to understand how certain behaviors in your life may have changed since becoming housed. Please be honest. Nothing you say will negatively impact the supports you receive in housing, nor will it result in you being evicted or losing your supports. This survey is only one page long and takes only 5-10 minutes to complete.

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Resources

- [National Alliance to End Homelessness](#)
- [Org Code Consulting](#)
- [HUD Rapid Rehousing Brief](#)
- Ashley Halladay-Schmandt, ashley@endhomelessnessnmi.org

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