

HOUSING-BASED CASE MANAGEMENT: BEST PRACTICES TO ASSIST CLIENTS WITH HOUSING OPTIONS

Presenters

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Agenda

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- Rationale for training
- Housing-based case management definitions
- Elements of successful housing/residential case management
- Housing resources
- Group discussion/best practices from the field

Rationale for training

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- Agencies with multiple programs, some housing focused and some not
- Lack of supervisory support that stresses housing as a key social determinant of health
- Client to worker ratio doesn't allow for the length of time required to also focus on housing
- For clients who are housed – although not necessarily stable – the housing issue often takes a back seat to more pressing health/mental health concerns

Definition of case management

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First, we need to define case management:

- Engagement
- Assessment and goal-setting
- Service Coordination
- Resource Development/Advocacy
- Follow-up
- Reporting

Case manager roles

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Key case manager roles:

- Building **trust**
- Tracking residents' whereabouts and **progress**
- Helping residents qualify for/maintain public **benefits**
- Facilitating **access to care**: arranging, accompanying, and teaching residents to manage the system
- Identify early signs of **decompensation** and doing whatever it takes to resolve behaviors that can lead to negative consequences

Case management and housing

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- Let's discuss case management in terms of health outcomes for housing-based case management.

Housing and health outcomes

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HIV/AIDS research shows:

- ❑ Housing status predicts HIV treatment success or failure
- ❑ Access to housing enables PLWHA to get into care and stay in care
- ❑ These results are relevant to other client populations, too - stable housing results in better health/mental health outcomes

Housing and health outcomes (continued)

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What this connection means for local practice:

- Housing status is likely the most important characteristic of each new client – the most significant determinant of each person's health and risk outcomes.
- Case management must include some focus on housing assessment, placement, and housing stability.

Case management methods/models

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Some well-known case management models:

- Broker Case Management
- ICM: Intensive Case Management
- ACT: Assertive Community Treatment
- CCT: Continuous Treatment Teams

Case management methods/models

(continued)

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Supportive housing and case management:

- All SHP models include case management
- The “level” of case management intensity and recommended caseloads will vary by population

Example: An Intensive CM or ACT model is typically recommended, at least initially, for programs serving persons with severe and persistent mental illness. An appropriate staff/client ratio for this type of program would be around 1:10.

Elements of successful housing/residential case management

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- Definitions
- Roles
- Tools
- Discussion

Housing-based case management

(continued)

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How is housing-based case management different than any other type of case management?

- Added focus on:
 - ▣ Housing readiness measures: are they ready?
 - ▣ Housing stability measures: how stable are they?
 - ▣ Development of ongoing housing-related goals that emphasize not only acquisition of housing, but ongoing stability.

Housing is an ongoing focus – not just when seeking housing or during a crisis!

Basic case management components

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- Engagement
- Assessment
- Goal-setting
- Service Coordination
- Resource Development/Advocacy
- Follow-up
- Reporting

Housing-based case management

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Goal: Helping clients to *secure and maintain stable, affordable housing.*

- For clients not currently in safe, decent, affordable housing, the primary goal is to develop a strategy to assist them in **securing housing.**
- For those already housed, the goal is to assure that adequate supportive services are in place so the client can **maintain housing.**

Housing-based case management

(continued)

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Engagement

Being homeless or marginally housed is connected to:

- Loss of power
- Loss of role
- Loss of connection
- Lack of nutrition/sleep

All of these experiences make it more challenging to engage the client in a trusting, productive relationship.

Housing-based case management

(continued)

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Engagement is KEY!

Without a connection, your effectiveness will be limited. Don't rush this step!

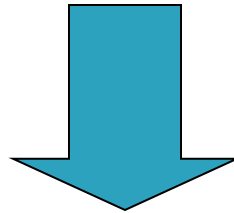
- Question: What methods have you used to engage hard to reach clients? Those who are distrustful?

Housing-based case management

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Client engagement

Making a connection – gaining trust



Housing readiness and services needs assessment

An in-depth review of client needs and desires

Housing-based case management components (continued)

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Assessment

- History: What actions, behavior or circumstances led to housing problems?
- In what setting has the client been happiest and most stable? What settings did not work?
 - ▣ Permanent, independent
 - ▣ Supportive housing
 - ▣ Community residence or other
- What supports will this client need in order to enter and remain stable in housing?

Housing needs/readiness assessment

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Step 1: Learn about the client.

□ History

- Past housing experiences: what worked best? What were the struggles? What issues interfered with housing stability?
- What is the client's ability to negotiate systems, solve problems, and access services?

□ Choices, preferences, aspirations

- Bottom line now vs. hopes for the future (ex. homeownership)
- Preferences (neighborhood, size of apartment, amenities)

Housing needs/readiness assessment

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Step 2: Share information with the client

- Housing realities and available options
 - ▣ Educate on all available housing options
- Expectations of tenancy
 - ▣ Rent payments, house rules, visitors, maintenance
- Discuss skills and support needed to maintain chosen housing options
- Introduce housing stability – not just obtaining housing – as a service goal

Housing readiness assessment (continued)

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Suggestions

- Use a **checklist of barriers** with the client and use this information to guide the rest of the discussion.
- Develop a **housing history** by reviewing the client's housing situations over the past several years.

Housing readiness assessment (continued)

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Barriers Checklist example:

- ☑ No rental history
- ☑ Eviction(s) _____
- ☑ Large family (3+ Children)
- ☑ Single parent HH
- ☑ Head of HH under 18
- ☑ Sporadic employment history
- ☑ Recent criminal history
- ☑ Debts/insufficient savings
- ☑ No high school diploma/GED
- ☑ Insufficient/No income
- ☑ No or poor credit history
- ☑ Debts
- ☑ Repeated/chronic homelessness
- ☑ History of substance abuse/use
- ☑ History of abuse (client fleeing abuser)

Housing Readiness Assessment

Housing History Example

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Type of Residence	Dates of Residence	Reason for Leaving
<input type="checkbox"/> Emergency Shelter		
<input type="checkbox"/> Permanent housing for formerly homeless		
<input type="checkbox"/> Psychiatric hospital/facility		
<input type="checkbox"/> Substance abuse treatment		
<input type="checkbox"/> Hospital (non-psychiatric)		
<input type="checkbox"/> Room, apartment or house that you rent		
<input type="checkbox"/> Apartment/house you own		
<input type="checkbox"/> Staying/living in a family member's room, apt., etc.		
<input type="checkbox"/> Hotel or motel		
<input type="checkbox"/> Place not meant for habitation		

Housing stability check

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- Even when housed, is the client really stable?
- Incorporate a regular housing burden check:
 - Calculate current housing burden: Monthly rent and utility cost/monthly household income
 - 30% of gross income is considered affordable

Housing stability check (continued)

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Rent burden example:

- Monthly rent & utilities = \$600
- Monthly household income = \$1,200
- $\$600 / \$1,200 = 50\%$

This household is spending 50% of its monthly income on rent and utilities. This is considered to be severely housing burdened.

Housing stability – other factors

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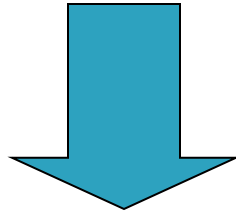
- Other stability factors to consider:
 - ▣ Debt and other high expenses
 - ▣ History of past evictions
 - ▣ History of homelessness
 - ▣ Recent history of substance abuse
 - ▣ Mental health issues
 - ▣ Short time in current housing (< 6 mos.)

Housing-based case management

(continued)

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Housing and services needs assessment
Information to guide the planning discussion



Housing services plan
Documents client goals, resources needed, and
expected assistance from the case manager

Housing-based case management components (continued)

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Goal-Setting: Housing Services Plan

- Understanding the client's housing preferences
- Reviewing realistic options
- Finding the right “fit”
- Goals reflect the steps needed to **get into** and **successfully stay in** housing

This is an opportunity to assist clients with budgeting, assess credit/debt, and establish plans for clients to manage/save money!!!

Housing-specific goals

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- The housing plan should incorporate specific, measurable, attainable goals related to:
 - ▣ Obtaining housing
 - ▣ Maintaining housing
 - ▣ Issues of income, employment and money management
 - ▣ Independent living skills
 - ▣ Obtaining needed treatment for substance abuse, mental health issues, etc.
 - ▣ Future-oriented housing goals

Future-oriented housing goals

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Homeownership for special needs clients:

- Many people want this in the future
- Setting a realistic future goal is motivating
- Even for those not yet ready for homeownership, the stepping stones will be beneficial to their rental housing stability
 - ▣ Budgeting, saving, reducing debt, repair credit history, increasing income, increasing independence

Plan for achieving goals

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Key elements:

- Time frame
- Specific outcome to achieve
- Support needed to achieve goal
- Tasks to be accomplished by client and case manager

Housing-based case management components (continued)

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Service Coordination

- ❑ Connecting clients to the support services needed to achieve and maintain housing stability
- ❑ Monitoring client progress in housing and making service adjustments as needed.

Monitoring Stability – Issues to Consider

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- Client as Tenant and Program Participant:
 - ▣ Does the client pay rent on time each month?
 - ▣ Utilities?
 - ▣ Any landlord complaints on condition of the unit or disturbance to neighbors?
 - ▣ Program violations?
 - ▣ If so, what steps are necessary to resolve the issue(s)

Monitoring Stability – Issues to Consider

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- Client as a Good Tenant and Neighbor:
 - ▣ Has the landlord communicated any complaints or concerns to the client? To the program?
 - ▣ Does the client have complaints regarding the landlord or neighbors?

Monitoring Stability – Issues to Consider

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- Does the Client Need Assistance With:
 - ▣ Money management – able to pay rent, cash checks, budget
 - ▣ Ability to understand and follow lease/house rules
 - ▣ Housekeeping skills/shopping/cooking skills
 - ▣ Social skills – ability to maintain positive relationships
 - ▣ Communication skills
 - ▣ Awareness of service needs and ability to seek and accept help

Housing-based case management components (continued)

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Resource Development

- Listings of affordable housing
- Listings of openings in supportive housing programs
- Relationships with landlords
- **Question:** What housing resources do you identify for your clients?
 - ▣ Vouchers, HOME, LIHTC, USDA properties
- **Question:** Is there a housing resource specialist on your staff?

Maintaining/tracking housing stability

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Discussion:

- How to track and document client acceptance into housing?
- How to keep tabs on the stability of clients placed in housing?
- Ideas on what will work?

Ongoing case management

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Discussion:

- What are creative ways to engage in follow up with our clients?
 - ▣ Peer support groups
 - ▣ Case manager drop-in hours but no set appointments after 6 months
 - ▣ Monthly telephone/email correspondence
 - ▣ Pot luck dinners

Let's hear from you...

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Questions:

- What has worked for you re: housing-based case management?
- What challenges have you faced in implementing housing-based case management?
- Examples of best practices

Questions???

For more information...

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