

# **Choose, Get, Keep. . . Integrated Community Housing**

**A Supplement to ABCs of Nursing Home Transition: An Orientation  
Manual for *New* Transition Facilitators**

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## Introduction and Purpose of This Guide

This guide is a supplement to *ABCs of Nursing Home Transition: An Orientation Manual for New Transition Facilitators* previously published by Independent Living Research Utilization (Holt, Jones, Petty, Roth, & Christensen, 2006)<sup>1</sup>. The two guides are meant to be used together. The first guide provides a context for this guide and discusses the overall process of assisting someone with their transition out of a nursing home into the community. This second guide, *Choose, Get, Keep. . . Integrated Community Housing* gives greater detail on one of the most challenging aspects to the transition process—locating and securing housing that meets the individual’s needs and preferences so that the transition can be completed.

Housing is an integral part of our lives. The neighborhood and community that we live in influence the availability of medical services, school and work opportunities, shopping, transportation, cultural events, and religious, recreational, and community activities. People with disabilities who live in nursing homes miss out on nearly all these opportunities. Christopher Morley said, “There is only one success – to be able to spend your life in your own way.” One of your jobs as a housing specialist may be to assist individuals with disabilities to transition out of nursing homes in order to live their lives in their own way.

Living in a house, condo, co-op, mobile home, or apartment instead of an institution vastly increases independence, productivity, and quality of life. Transitioning out of a nursing home means gaining the freedom, privacy, and control to make daily decisions, to choose when to get up, when and what to eat, what to do, where to work or volunteer, where to shop, who to visit, which doctor to see, and much more.

Your work as a housing specialist is vital. The individuals you work with may need support to identify what kind of housing they need and want and which neighborhood they prefer to live in, search for housing units, fill out applications, negotiate and make accommodations, obtain support services, and protect their rights. The purpose of this guide is to help you be more effective and successful during this entire process including searching, planning, moving, doing follow-up, and advocating for more accessible, affordable, and integrated housing.

### Target audience

This guide is intended for use by housing specialists and transition facilitators in centers for independent living (CILs) – individuals who work with people in nursing homes and other institutions to help them reclaim a life in the community, including regular, integrated housing. It will be especially useful to new housing specialists and transition facilitators. A housing specialist is anyone who works with an individual on choosing, getting, and keeping housing. This could be a person whose only job is the housing

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<sup>1</sup> Available at <https://www.ilru.org/abcs-nursing-home-transition-orientation-manual-for-new-transition-facilitators>

transition, or the housing activities can be part of the larger role of the transition facilitator. In any case, this guide is intended to make regular, integrated housing a realistic option for people leaving nursing facilities and other institutions. It should not be considered a definitive manual, but should be supplemented with the appropriate training, forms, procedures, and policies used by your agency or organization, as well as with the provision of mentoring and support from experienced housing specialists. The guide may also be useful for other key players, such as:

- Directors and administrators of CILs;
- Staff and members of Statewide Independent Living Councils (SILCs);
- Individuals who wish to move from institutions; and
- Local and state decision makers.

### **Level of knowledge required**

The guide is directed at those who have a working knowledge of general transition issues, such as the need for outreach and engagement, access to waiver services and other community supports, and person-centered planning. Use of the companion guide, *The ABCs of Nursing Home Transition* is recommended. This guide is focused on specific knowledge, skills, and abilities necessary to facilitate a person's transition from a nursing home or other institution to regular, integrated housing in the community.

### **How the guide is organized**

Five chapters and two appendices follow this introduction. Though they can be read independently of one another, each chapter builds on the one that precedes it to help readers plan for and work through the necessary steps of transition from institution to a home in the community.

- Chapter 1 – Getting Started: What Every Housing Specialist Needs to Know identifies and provides details about what it takes to make a successful transition to community housing. This chapter introduces the concept and practice of permanent supportive housing and provides an overview of legislation and public policy.
- Chapter 2 – Housing Industry Core Concepts includes a detailed discussion of affordability and accessibility, introduces housing specialists to common terms, and provides details about the types of financial assistance in the housing world.
- Chapter 3 – Planning and Preparation offers tips on how to work with individuals to plan and prepare to leave the institution, and to move to regular, integrated housing. Topics include looking realistically at potential barriers and solutions, constructing a timetable for the transition, and involving key actors to help.

- Chapter 4 – How to Choose Housing provides housing specialists with tips and tools to help individuals assess their needs and preferences regarding housing. Topics include creating a budget, deciding what type of housing is best for each person, and need/desire for housemates.
- Chapter 5 – How to Get Housing includes specific information about resources that can support individuals in regular, integrated housing. The chapter offers guidance about working with Public Housing Authorities and private landlords, and Fair Housing law and reasonable accommodations.
- Appendix A – Ability 360 is an example of a CIL that has taken the vision of community integration to new heights.
- Appendix B – Making the Move provides practical support to housing specialists, transition facilitators, and individuals as they make the actual move from the facility. Checklists, “how-to” fact sheets for the new tenant, and tips on keeping records are included.

## Using the Guide

There is no one correct way to use this Guide. Where you start reading and what you get out of it will depend on where you are in the process of helping someone transition from a facility to regular, integrated housing. Tips and tools are designed to “pull out” as you need them and can be used in any order.



## CHAPTER 1: What Every Housing Specialist Needs to Know

Having a home is a universal human need. Without a place to call home, people with disabilities have trouble recovering or maintaining their health, becoming self-sufficient, and reclaiming valued roles in their families and communities. Unfortunately, many people with disabilities are extremely poor. Poverty combined with a lack of affordable housing and support services causes people with disabilities to remain unnecessarily in institutions. These facts are the basis of the Olmstead Supreme Court decision.

There is a growing body of evidence that stable housing is an important social determinant of health (SDOH). The Centers for Disease Control (CDC) defines SDOH as "...conditions in the places where people live, learn, work and play [that] affect a wide range of health risks and outcomes."

Community integration for people with disabilities is not just a concept or an idea or a goal or a theory – it is the law! In every state, people with disabilities are leaving nursing homes and other institutions to live in the community – with the same opportunities as others to live, work, and play. Community integration is not possible for people with disabilities without access to accessible, affordable, and integrated housing. Let's look at these ideas:

- Accessible housing is required by the Fair Housing Act, Section 504 of the Rehabilitation Act of 1973, and the Americans with Disabilities Act. According to HUD guidelines, housing that is accessible facilitates the ability of persons with disabilities to enjoy full use of their homes and is essential for equal access and to avoid future de facto exclusion of people with disabilities. While some communities have made progress in the development of accessible housing, the truth is that there are not enough accessible units for the people who need them, and many of the accessible units are too expensive for people on an SSI or SSDI income.
- Affordable housing is in short supply in every community. The lack of affordable housing has been driven by both market forces and by federal, state, and local public policies that allow affordable housing funds to be spent on households above the poverty line. The result is an extreme shortage of units that are affordable to people at an SSI level income. One remedy is housing assistance funds that make existing housing affordable. Another strategy is to influence the development of new affordable housing units, making a percentage of those units affordable to households in poverty.
- Integrated housing units are defined as regular housing units typical of housing units found in the community, scattered throughout the community. One measure of integration is physical – who are your neighbors? Another measure of integration is legal – do you have full rights of tenancy? Integration is important to the discussion of housing for people with disabilities.

## **Legislation and Public Policy Supporting Housing for People with Disabilities**

The idea that people with disabilities can and should live in regular, integrated housing is not new, and its roots may be found in a variety of laws and social movements. However, several policy initiatives in the past decade have energized efforts to help people with disabilities to choose, get, and keep regular, integrated housing. The most important of these initiatives are the Americans with Disabilities Act, the Fair Housing Act, Section 504 of the Rehabilitation Act of 1973, and the Supreme Court's Olmstead Decision.

### **Americans with Disabilities Act**

The Americans with Disabilities Act of 1990 (the ADA) provides a national mandate to end discrimination against persons with disabilities and clear, strong, enforceable standards. The ADA prohibits discrimination against individuals in private sector employment, all public services, public accommodations, transportation, and telecommunications.

As it relates to housing, the "public accommodations" aspect of the ADA is probably the most relevant component. Under the ADA, any commercial facility or business that is open to the public is considered a public accommodation. This means that leasing offices, showrooms, and other places where housing is rented or sold must be accessible to people with disabilities. It also requires the owners of these buildings and facilities to make reasonable accommodations which will allow people with disabilities to use the building or services provided there. While the applicability of ADA to residential buildings is somewhat unclear, hotels, motels, homeless shelters, and other similar facilities are all covered. Further, public areas, such as the laundry room, community center or mail facilities must be accessible to persons with disabilities. Almost 39 years after its passage, many cities and towns have incorporated ADA accessibility features into their local commercial building codes.

### **Fair Housing**

Title VIII of the Civil Rights Act of 1968, commonly known as the Fair Housing Act, prohibits discrimination in the sale, rental, and financing of housing based on race, color, national origin, religion, and sex. The Act was amended in 1988 to expand protection for families with children and persons with disabilities.

The Fair Housing Act covers all residential transactions with two exceptions. It does not cover the sale of a home by its owner, without the use of a real estate agent, when that owner does not have an interest in more than three additional single-family homes. Also, it does not cover landlords who live in their own buildings if the building has four or fewer apartments.

In addition to prohibiting discrimination against persons with disabilities in the sale or lease of housing, the Fair Housing Act requires landlords to make “reasonable accommodations” in their policies and rules, if that accommodation is necessary to allow the person with a disability to live in the unit. This is one of the most useful aspects of the law, as it provides some leeway in rules and policies to accommodate the needs of a tenant who has a disability. For example, under the reasonable accommodation aspect of Fair Housing, a person who uses a service animal would be allowed to live in a building that has a “no pets” policy. Additional information and examples of how reasonable accommodations work are given in *Chapter 4, How to Choose Housing*.

## **Section 504**

Section 504 of the Rehabilitation Act of 1973 was one of the very first laws that specifically focused on persons with disabilities. Section 504 prohibits discrimination based on disability in any program or activity that is conducted by the Federal government or that receives federal financial assistance. This includes housing, employment, education, and health. Housing covered by Section 504 includes public housing, HUD-subsidized housing, transitional housing for the homeless which receives federal funding, and Supportive Housing programs for the elderly or persons with disabilities which receive federal funding.

Section 504 does not apply to the private housing market. Landlords who lease units to tenants with Housing Choice Vouchers are not covered by Section 504. When Section 504 does apply to rental housing (units that have federal dollars for construction, for example), the landlord is required to make alterations in policies and procedures as well as to the physical structure (at landlord expense) to make the housing accessible and usable by individuals with disabilities. In most cases, this applies to a percentage of the units only.

## **The Olmstead Decision**

One of the most important pieces of case law regarding housing for people with disabilities is the Olmstead Decision. In the 1999 legal case of *Olmstead v. L.C. and E.W.*, the United States Supreme Court ruled against the State of Georgia’s appeal to enforce institutionalization and affirmed the right of people with disabilities to live in the community.

The Supreme Court decision affirmed that the ADA prohibits the segregation of individuals with disabilities. The clinically unnecessary isolation of people with disabilities is a form of discrimination based on that disability. The Supreme Court recognized that this discrimination “...perpetuates unwarranted assumptions about their capabilities and their worthiness to participate in community life. The Court found that institutional confinement deprives people of most of what is valued in life: family relations, social contacts, work, educational advancement and cultural enrichment.” (Bazelon Center for Mental Health Law. <http://www.bazelon.org/the-olmstead-case/>)

In interpreting the ADA, the Court relied on the “integration mandate”—a regulation issued by the U.S. Department of Justice requiring public entities to “administer services, programs, and activities in the most integrated setting appropriate to the needs of qualified individuals with disabilities.” 28 C.F.R. § 35.130(d).

As a result of this ruling, thousands of people have demanded their right to receive services in the community. Every state must have a plan to comply with the Olmstead ruling. Each state’s plan must outline how they will provide services to people with disabilities in the “least restrictive setting.” States are in violation of the ADA if they do not have a workable plan to reduce institutionalization and support meaningful community integration.

The US Department of Justice (DOJ) has investigated and driven the development of settlement agreements in multiple states, addressing issues such as housing, the provision of community-based services, and integrated employment options. See [https://www.ada.gov/olmstead/olmstead\\_cases\\_list2.htm](https://www.ada.gov/olmstead/olmstead_cases_list2.htm) for more information.

What does this have to do with housing? It reaffirms the rights of people with disabilities to live in the community. Also, it validates the need to access regular, integrated housing as opposed to institutional or segregated settings.

### **Federal Support for Olmstead**

The Administration for Community Living is based on the principle that people with disabilities “...should be able to live where they choose, with the people they choose, and with the ability to participate fully in their communities” (<https://acl.gov/>). While not solely concerned with housing, the programs and grants strongly support the community integration mandate of Olmstead.

The Substance Abuse and Mental Health Services Administration (SAMHSA) has supported Olmstead compliance through technical assistance. Since many of the DOJ investigations and settlement agreements are linked to the mental health system, SAMHSA guidance has been helpful. For a summary of State behavioral health system activities, see <https://www.samhsa.gov/sites/default/files/olmstead-policy-academy.pdf>.

In 2013, the Department of Housing and Urban Development (HUD) issued guidance on Olmstead and housing that provides background on the integration mandate and supports efforts to provide integrated housing. “As more states facilitate the transition of individuals with disabilities from institutional or other segregated settings into their communities, the need for meaningful choice among housing options is critical. For communities that have historically relied heavily on institutional settings and housing built exclusively or primarily for individuals with disabilities, the need for additional integrated housing options scattered throughout the community becomes more acute.” ([www.hud.gov/sites/documents/OLMSTEADGUIDNC060413.PDF](http://www.hud.gov/sites/documents/OLMSTEADGUIDNC060413.PDF), page 2).

The community integration mandate is an important affirmation of the rights of people with disabilities.

## Housing and Supportive Services

Housing is necessary for community integration, but it may not be sufficient to ensure long-term success. Many individuals with all types of disabilities need supportive services to help them remain in housing. The needed supports or services might include personal assistance services, primary health care, mental health services, substance abuse treatment, money management, benefits assistance, job training, transportation, day care, and in-home nursing care.

Supportive services will vary, depending on individual needs. At a minimum, some individuals may need coordination services to provide linkages with the full range of community services needed to promote stability.

Effective approaches link affordable, accessible, and integrated housing to a voluntary package of supports and services that help people live in and retain housing. This approach, sometimes called Permanent Supportive Housing (PSH), is an expansion of values and concepts that underlie the independent living (IL) movement. The idea that people with disabilities have the same right to live in the community as everyone else is made feasible through an organized approach to making housing affordable and accessible. Voluntary supportive services must be available as well. PSH is an evidence-based practice, meaning that the proper implementation of this model will result in predictable outcomes, such as an increase in housing stability and health outcomes.

*Permanent Supportive Housing (PSH) is a model that combines low-barrier affordable housing, health care, and supportive services to help individuals and families lead more stable lives. PSH typically targets people who are homeless or otherwise unstably housed, experience multiple barriers to housing, and are unable to maintain housing stability without supportive services. This model has been shown to not only impact housing status, but also result in cost savings to various public service systems, including health care. (National Health Care for the Homeless Council, <https://www.nhchc.org/policy-advocacy/issue/permanent-supportive-housing/>).*

Although CILs cannot own or operate housing, many do offer housing assistance in a coordinated fashion with other IL services, maximizing individual chances for success in the community. The principles and practices of an effective housing approach are consistent with IL philosophy. These include the belief that people with disabilities should have the same rights and opportunities as other people and direct their own lives, without unnecessary or unwanted interference from health or other support organizations. This philosophy clearly states that people with disabilities:

- Should have the same rights and opportunities as all citizens to choose, get, and live in integrated housing;

- Should have the right to receive, direct, or refuse their own support services; and that
- Participation in specific support services should not be required to get or keep housing.

Putting these ideas into practice means that supportive housing is different from residential programs or housing linked to involuntary services. Some of the key differences, expanded upon in the next section, are:

1. Housing is housing, not a service program.
2. Housing is not transitional.
3. Choice. Housing and any services are chosen by the tenant.

## CHAPTER 2: Housing Industry Core Concepts

Despite what we know about the connection between housing and health, the lack of affordable and accessible housing is a persistent problem. The housing industry is building housing under the label “affordable” that is too expensive for households in poverty or households on an SSI income. And the development of accessible housing units rarely exceeds required federal minimums.

### Affordability and Accessibility – What is the Problem?

Rental housing is increasingly unaffordable, with demand far outstripping supply and density limiting future development in many of our major cities. According to the National Low-Income Housing Coalition, there are more than 11 million households in poverty, and only 4 million units that might be affordable for that level of income. “A worker earning the federal minimum wage of \$7.25 per hour must work nearly 127 hours per week (more than 3 full-time jobs) to afford a two-bedroom rental home or 103 hours per week (more than 2.5 full-time jobs) to afford a one-bedroom rental home at the national average fair market rent.” (Out of Reach, 2019, [https://reports.nlihc.org/sites/default/files/oor/OOR\\_2019.pdf](https://reports.nlihc.org/sites/default/files/oor/OOR_2019.pdf).)

People with disabilities are among the poorest people in the nation, and frequently rely on Supplemental Security Income (SSI) or other forms of income supports that place them well below the poverty line. Housing affordability problems are not disability-specific issues but are driven by poverty.

Without rental vouchers, other financial assistance, or access to subsidized housing most people with disabilities cannot afford housing. Unfortunately, due to chronic underfunding, housing assistance is only available to one in four of the households that need it. (Out of Reach 2019). There will be more about how to find and access housing in Chapters 4 and 5.

### Housing Industry Core Concepts

The United States operates two real estate markets: the traditional private sector market which is dictated by supply and demand, and the publicly-funded housing market, which is dictated by funding legislation and regulations governing the operation of housing developed or supported with public dollars.

HUD administers a large portion of the funds used to make housing affordable. The U.S. Department of Agriculture (USDA) also funds significant resources for affordable housing; in this text we have included their multifamily inventory as a resource, but they also operate homebuyer programs and fund community development initiatives. The Low-Income Housing Tax Credit program is, at its source, a US Treasury program, but for our purposes, we need to know only that state housing finance agencies control this resource.

Each of the legislatively authorized funding programs provides housing for a specific population and a specific income bracket. Funds are administered by several different divisions of HUD. Depending on the program, funds may be committed by HUD directly to a specific housing project or program or funds may flow from HUD to a state or city to be allocated to specific projects by the local jurisdiction. As a housing specialist it is important to understand the language of housing and be familiar with a wide variety of sources that help make the cost of housing affordable to your consumers.

Housing specialists might benefit from a basic understanding about how the housing industry works and how common forms of financial assistance work. A fundamental concept is the HUD/housing industry standard of affordability, which is that a household should pay no more than 30% of income towards housing costs.

### **Area Median Income/Median Family Income (AMI/MFI)**

The area median family income is the median income for a city, town or state. The median is the middle point of all incomes in a place—half of all residents earn more than this number, while the other half earns less. HUD sets median incomes for each area each year. HUD also scales the AMI by family size. So the median family income (MFI) for a family of one is different from the MFI for a family of five.

### **“Low Income” Definitions**

Many housing programs target assistance to people who fall into different income categories, based on median family income. For example, Public Housing Authorities generally serve people who earn 30% or less of MFI. Other programs limit assistance to people earning no more than 80% MFI and homeownership programs often target households who earn between 100% and 120% MFI.

The housing industry, following HUD’s leadership, stratifies low income housing based on the income of households:

- Extremely low-income: At or below 30% of median. In almost every community in America, an SSI income is in this category.
- Very low-income: Between 31% and 50% of median.
- Low-income: Between 51% and 80% of median.
- Moderate income: Between 81% and 120% of median.

The definition of low-income housing, linked to median income, has created problems for people at the lowest levels of income. “Low-income” housing is not serving households in poverty at all. Most of the affordable housing is developed for low-income households, because HUD and other funding sources do not require that units be affordable below this level. The practical result is that too much of America’s investment in affordable housing is not working for people in poverty, including people on disability income.

## **Fair Market Rents**

Every year, HUD sets Fair Market Rents (FMRs) for every area of the country. These are used to calculate many types of assistance, including housing choice vouchers (see below) and requirements for housing development built with federal dollars. They are not required for private landlords, and in most communities, private landlords charge the highest rent possible for their units. This highest rent possible is also known as “market rate.”

## **The rental market**

What does this mean on a practical level? In the table below, you can see that the area median income is well above the 2019 federal poverty level of \$12,490 for a family of one. Even more damaging, all of the extremely low income (ELI) numbers are also above the poverty line. There are two conclusions relevant here:

1. The HUD FMR is out of reach for ELI households, and the FMR is even less affordable for households on the federal minimum SSI.
2. The way housing affordability is structured does not work well for households in poverty and is even worse for households on SSI.

**TABLE 1: Example Area Median Income**

State	Area Median Income *	30% of AMI (Extremely low-income - ELI) *	What an ELI household (HH) can pay for rent *	What an SSI income HH can pay for rent	HUD Fair Market Rent 2019 for 1-bedroom unit **
California	\$85,605	\$25,682	\$642	\$225	\$968
Missouri	\$71,345	\$21,404	\$535	\$225	\$786
Nebraska	\$76,801	\$23,348	\$576	\$225	\$620
New Mexico	\$61,478	\$18,444	\$461	\$225	\$711
Ohio	\$71,023	\$21,304	\$533	\$225	\$678
Pennsylvania	\$78,834	\$23,650	\$591	\$225	\$725
Texas	\$72,786	\$21,836	\$546	\$225	\$1,086
Virginia	\$89,414	\$26,824	\$671	\$225	\$925

\*Data from Out of Reach (2019), National Low Income Housing Coalition, [https://reports.nlihc.org/sites/default/files/oor/OOR\\_2019.pdf](https://reports.nlihc.org/sites/default/files/oor/OOR_2019.pdf)

\*\* HUD FMR (2019) at [https://www.huduser.gov/portal/datasets/fmr.html#2019\\_data](https://www.huduser.gov/portal/datasets/fmr.html#2019_data).

Sample communities selected are: Sacramento; Kansas City; Lincoln; Albuquerque; Cleveland; Pittsburgh; Austin; Virginia Beach.

## **Financial Assistance**

Financial assistance for housing comes in two main categories. The first is assistance to help pay the rent for specific tenants; this type of assistance is generally known as

vouchers. The second type of assistance is funding that is linked to specific housing projects or units. That is, funding is provided during development to help make a percentage of units more affordable, or funding is attached to specific units, making those units more affordable.

### **Tenant-based Rental Assistance**

Tenant-based rental assistance (TBRA), informally known as ‘vouchers’, helps individual tenants afford housing. The individual pays 30% of their income, no matter how small that is, and the voucher pays the difference between the fair market rent for a specific unit size and the tenant payment. The payment is made directly to the landlord. Not all landlords will accept a voucher. You may be able to obtain a list of participating landlords from the funding source for the voucher.

TBRA is a tool that makes market-rate housing affordable to extremely low-income households. It makes “unsubsidized” housing financially feasible.

There may be many types of housing vouchers available in your community. The housing specialist should be the expert on all voucher-type assistance programs and know how to help people apply and get on waiting lists, where necessary. Types of vouchers that might be available in your community include:

- *Housing Choice Vouchers (HCV)*. The most common form of tenant-based subsidy is the Housing Choice Voucher program (commonly known by its old name, “Section 8”). This subsidy is funded by HUD and administered by local PHAs. To qualify for and receive a voucher, tenants apply through the local PHA. Eligibility for a Housing Choice Voucher will primarily be determined by income, although other factors may play a role. Most people relying solely on SSI or other disability income meet the income criteria for vouchers. Many PHAs have waiting lists, or may have closed their program to new applicants, due to the high demand for housing assistance. If the waiting list is open, it is advisable to help people get on the lists, even if it seems like a long wait. HCV lists move unpredictably. For example, a PHA might decide to clean up their list, purging people who do not reply to an outreach mailing. This could cause the list to shorten. Note: It is important for people to pay attention to any communication from the PHA and never ignore a letter! Otherwise, they could lose their place on the list.
- *Mainstream Vouchers*. Mainstream vouchers are targeted to people with disabilities. The assistance is structured in the same way as the HCV, that is, the tenant pays 30% of their income, and the program works with participating landlords. These vouchers are administered by PHAs. PHAs must compete for this assistance; if your PHA has not applied, this is an opportunity for advocacy!
- *Veterans Affairs Supportive Housing*. This program, co-sponsored by the Department of Veterans Affairs and HUD, combines voucher rental assistance for homeless Veterans with case management and clinical

services provided by the VA. These vouchers must be administered by PHAs; a list of participating agencies is found at:

[https://www.hud.gov/sites/dfiles/PIH/documents/HUD\\_VASH%20Awards\\_\(2008-2018\)\\_updated2019.pdf](https://www.hud.gov/sites/dfiles/PIH/documents/HUD_VASH%20Awards_(2008-2018)_updated2019.pdf).

- *HOME Program, Tenant-based rental assistance.* The HOME program is funded by HUD through a local or state Consolidated Plan (ConPlan). Cities with at least 75,000 in population and counties with 250,000 in population receive this funding annually. Smaller communities are governed by the State's ConPlan. "Participating jurisdictions" don't have to apply for it, it comes to them on a formula devised by HUD. TBRA is an optional activity under the HOME program. When a community is using their dollars for TBRA, the assistance is typically available through local non-profits. The vouchers are for 24 months, with an optional six-month extension. This means they can be used to help people who can transition to more permanent assistance or employment within the time period. To find out if your community is using HOME funds for TBRA, contact your city or county housing or community development department.
- *State or local programs.* Some states and communities provide assistance for people with disabilities independent of HUD or other federal funding. For example, the State of Maine Substance Abuse and Mental Health Services Office operates the Bridging Rental Assistance Program (BRAP). Participants pay 51% of their income towards housing costs and the difference between the tenant payment and the fair market rent is paid by BRAP. The program is funded with state general revenue.

### **How a Voucher Works**

When using tenant-based rental assistance, tenants pay a portion of their monthly income towards housing costs. This is usually – but not always – 30% of monthly-adjusted income. The voucher will pay the remainder of the rent directly to the landlord each month.

A tenant may be able to choose a housing unit that costs a little more than the affordability standard, but there are two important limits: 1) the tenant must pay the difference out of pocket, and 2) the tenant's total contribution towards the rent cannot be equal to more than 40% of the tenant's monthly adjusted income when he first moves into the unit. This maximum applies also in those situations when a tenant is using his voucher in one unit and then relocates to another. However, once someone is in a unit that is receiving assistance, if the rent increases and the rent standard does not, the tenant must pay the difference out of pocket and can exceed the 40% maximum.

### **Subsidized Housing**

Subsidized housing is affordable by definition; that is, the units themselves have been made affordable through project-based rental assistance or through creative financing

strategies during development. Types of subsidized housing that might be available in your community include:

- *Public Housing Authority housing units.* These units are operated by the PHA and tenants pay 30% of their income. Some PHA units are outdated and have suffered from insufficient repairs and updating. Over the last decade, HUD has invested in improving many public housing units, and it is worth taking a look at the units in your community. An advantage of PHA units is that the waiting list may be shorter than the wait for a voucher.
- *HUD 811 Program.* The HUD 811 program has evolved over the decades. Until 2011, this program produced small apartment complexes exclusively for people with disabilities, and all units were subsidized (tenants pay 30% of income). In 2011, the program was modified to allow applicants to use the dollars as a funding stream for developments that make up to 25% of the units affordable and targeted to people with disabilities.
- *HUD Multifamily Housing Inventory – Units for the Elderly and Persons with Disabilities.* These units were developed to provide affordable housing for people with disabilities and people who are elderly. These include any of the Section 811 properties that were developed as small apartment units.
- *United States Department of Agriculture Multifamily Housing Inventory.* These units were developed in rural areas, are below market rate, and some units are subsidized, meaning that the tenant pays only 30% of their income for rent.
- *State or local programs.* Many communities use local bond programs to support affordable housing development, and states may have initiatives that support the development of deeply affordable units. For example, the New Jersey Special Needs Housing Trust Fund, funded through motor vehicle surcharges, is a “...special, non-lapsing revolving fund is designed to develop special needs housing and residential opportunities as alternatives to institutionalization or homelessness for those who would benefit from these programs and to ensure the long-term viability of such housing.” (<https://www.nj.gov/dca/services/lps/hss/statsandregs/planresources/fundguide.pdf>).

## Housing Accessibility

For people with disabilities, physical accessibility of housing is extremely important, and inaccessible features can prevent an individual in a nursing home from moving into the community. The laws that mandate accessibility in the United States include the Americans with Disabilities Act (ADA), Fair Housing, and Section 504 of the Rehabilitation Act. While each of these laws maintains similar standards for accessibility, they apply to different situations. A brief overview of each was included above and additional information is provided throughout this guide. As a housing

specialist you should become familiar with each law and where and how they apply to housing that individuals may be interested in.

All federally-assisted multi-family housing includes the minimum number of accessible units that meets federal standards and local requirements. “All Federally assisted new construction housing developments with 5 or more units must design and construct 5 percent of the dwelling units, or at least one unit, whichever is greater, to be accessible for persons with mobility disabilities. These units must be constructed in accordance with the [Uniform Federal Accessibility Standards \(UFAS\)](#) or a standard that is equivalent or stricter. An additional 2 percent of the dwelling units, or at least one unit, whichever is greater, must be accessible for persons with hearing or visual disabilities.” ([www.hud.gov/program\\_offices/fair\\_housing\\_equal\\_opportunity/disabilities/accessibilityR](http://www.hud.gov/program_offices/fair_housing_equal_opportunity/disabilities/accessibilityR)). Use of the federal minimums is inadequate to meet the needs of people with disabilities.

## **Universal Design**

There has been a growing interest in Universal Design. Universal Design is defined as the “design of products and environments to be usable by all people, to the greatest extent possible, without the need for adaptation or specialized design.” The general principles of Universal Design are<sup>2</sup>:

- **Equitable Use:** the design is useful and marketable to people with diverse abilities.
- **Flexibility in Use:** the design accommodates a wide range of individual preferences and abilities.
- **Simple and Intuitive:** use of the design is easy to understand, regardless of the user's experience, knowledge, language skills, or current concentration level.
- **Perceptible Information:** the design communicates necessary information effectively to the user, regardless of ambient conditions or the user's sensory abilities.
- **Tolerance for Error:** the design minimizes hazards and the adverse consequences of accidental or unintended actions.
- **Low Physical Effort:** the design can be used efficiently and comfortably and with a minimum of fatigue.
- **Size and Space for Approach and Use:** appropriate size and space is provided for approach, reach, manipulation, and use regardless of user's body size, posture, or mobility.

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<sup>2</sup> Adapted from The Center for Universal Design, <http://universaldesign.ie/What-is-Universal-Design/The-7-Principles/>

## **Visitability**

*Visitability* is a term that refers to single-family or owner-occupied housing designed in such a way that it can be lived in or visited by people who have trouble with steps or who use wheelchairs or walkers. A house is “visitable” when it meets three basic requirements:

- One no-step entrance;
- Doors with 32 inches of clear passage space; and
- One bathroom on the main floor you can get into in a wheelchair.

Many cities and towns across the country have passed visitability ordinances that require some or all new housing to meet these basic requirements. Some cities have even added additional basic requirements for new construction such as electrical switches and outlets placed at heights that are accessible to people who use wheelchairs and lever-door handles on interior and exterior doors. Be sure to research and be knowledgeable about your local requirements.

## Chapter 3: Planning and Preparation

### Overview

This chapter covers everything a housing specialist and an individual who wants to move need to think about when planning a move. Topics include:

- Finding and talking to individuals who want to move – outreach and engagement
- Assessment – Key to good planning
- Developing a written plan
- Finding housing – How to prepare
- Tenant preparation

These activities occur before the person ever leaves a nursing home or other institutional setting. The planning and preparation are essential to making a successful move, and it is well worth the time and energy!

The individual needs to develop a realistic understanding of what it will take to make it happen while maintaining hopeful expectations of the move. The housing specialist needs to support the hopes and dreams of the person while bringing their expert skills and knowledge to the efforts. This chapter is designed to help the individual and the housing specialist begin to think about how to make it happen.

### Finding and Talking to People Who Might Want to Move—Outreach and Engagement

A housing specialist's job includes helping people move from institutional settings to regular, integrated housing in the community. How do we find people who want to move or are thinking about moving? It is possible to get a list of nursing homes from the state agency that controls licensure of these facilities. An Internet search of the phrase "nursing home licensure" should result in good leads. Some CILs that provide transition services have been successful in locating people who want to move by visiting all the nursing homes in their area, getting to know the staff, and making information available to residents about the CIL's services. Also, people in assisted living facilities may be looking to improve their living situation.

Another source of information is the State's Olmstead planning committee. As explained in Chapter 1, the Olmstead decision caused the creation of planning committees in each state. These planning committees may have established procedures designed to help people leave institutions, and this information can lead you to prospective tenants. And generally, CILs already have lists of people who have asked for help in moving from

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*Choose, Get, Keep Integrated Community Housing*

institutions. The housing specialist should use all these resources to ensure that people who live in institutions will be contacted about the opportunity to move out.

Once the housing specialist has made contact with someone who wants to move, it is vitally important to establish a relationship that includes trust and an ongoing commitment to using IL principles in working with the person who wants to move out of the institution.

What are the characteristics of successful housing specialists? People who do this kind of work well have a focus on the person (rather than on a disabling condition), and they see and recognize the person’s strengths, uniqueness, and skills. Too often, people in institutions are defined by the condition or disability that led to their institutional placement. A good housing specialist sees the person *first* and may be one of the few people to emphasize the person’s right to choose where they live.

Good housing specialists approach individuals in a spirit of empowerment and with attitudes and behaviors that support the self-determination of the person who is in the institution. Many times, well-meaning people want a person with a disability to remain in an institution because of concerns for safety and health. Family may fear that the person will not be safe unless they are in a nursing home or other protected setting. The housing specialist helps the person explore a range of choices. Each option is considered carefully, and the housing specialist gives a realistic picture of both benefits and difficulties. For example, a housing specialist who simply says – “You can do it!” is not providing a complete picture. It is more helpful to encourage the principle of self-determination, and help people make informed choices.

The housing specialist is respectful and hopeful and communicates these attitudes to the individual. If or when the individual becomes discouraged, the housing specialist reinforces that he or she is working on goals at the direction of the individual.

Sometimes, housing specialists encounter staff in nursing homes and other facilities who are hostile to the idea of people moving out. This may come from fears that individuals will not do well outside of the institution. The hostility may also stem from fear that the facility will lose customers! Housing specialists can create a more welcoming atmosphere through an attitude of respectful professionalism. The same principles that apply to establishing a relationship with the person who wants to move can apply to relationships with institutional staff. Respect, hope, careful listening, and clear, calm statements are useful tools in these situations.

**TABLE 2: Respectful vs. Less Helpful Approaches**

Housing Specialist Approach	Less Helpful Approach
Person-focused	Problem-focused
Reinforces self-determination	“We know what is best”
Respect	Disrespect
Hope	Discouragement
Careful Listening	Giving answers and solutions

## **Assessment—Key to Good Planning**

At the beginning of the process, the individual's assessment of their needs and wants may be more about why they want to move, and only a little bit about resources and services that might be needed to make it happen. Here, the housing specialist and the person get to know one another. This includes the housing specialist learning about the person and their motivation for moving. The housing specialist also needs to start the process of assessing, in a practical way, what it will take to move.

### **Why do you want to move?**

The housing specialist can begin by asking about the current living situation. What works well in this setting? Perhaps the nursing home is close to shopping and movies, provides accessible transportation or offers social activities. It is important to understand what will be missed from the present situation, so that these things can be sought in the new housing situation. For example, people often have friends where they are. It is important to talk about what it will be like to move and leave friends behind, how to stay in touch, and how relationships may change as a result of the move.

Another area to explore is “why do you want to move?” The housing specialist may assume that he or she understands, but it is helpful to know what specific reasons the individual has for thinking about such a significant change. For people in institutions, the reasons may include more control of daily activities (eating, sleeping), freedom from institutional rules, or simple dislike of their room. Other reasons people think about moving include wanting to be closer to family, move away from roommates, live in a prettier place, have more space, or live with a significant other.

Often, asking the individual what caused them to move into a facility in the first place can help determine what the priority issues are. Sometimes, asking the question can reveal why some individuals repeatedly cycle in and out of institutions, and may help prevent that from happening again. Experienced housing specialists have indicated that it is not unusual for individuals to be placed in an institution simply because they lack an affordable or accessible residence, not because their medical status requires it.

Also, it is helpful to ask explicitly about what specific changes would be desirable. Questions such as – “if you could change ONE thing, what would it be?” are useful.

Finally, it is important to get information about how family and friends of the individual feel about the possible move. Do they support and encourage the idea? Do they have concerns? Are they actively discouraging? Asking for information about who is close to the person (including contact information) and how they can be involved with the planning is essential.

### **What resources do you have to help you move?**

A crucial piece of the assessment process is to discover what resources the person has that will support their move. A delicate approach is necessary here. The housing

specialist needs to know what resources the person can bring to the effort to move, but the questions and the tone need to be encouraging. Many people who wish to move from institutional settings do not have the necessary money, community-based services, or social support that they need to make it happen. Exploration of the details of each personal situation needs to be accompanied by a hopeful discussion of possible sources of housing assistance and supports. The goal is to have a hopeful, yet realistic discussion.

This conversation also serves to educate the person about the realities of life in the community. Many times, people who have lived in an institution for years have no idea what it might cost to pay rent, pay utilities, and pay for food. There may be surprise and discouragement during this conversation. Again, a delicate balance between realism and hope is needed.

Questions that might be asked include:

- How much do you think you could afford to pay each month for rent and utilities?
- Do you have some personal financial resources such as income from a job, Veteran's benefits or disability payments?
- Do you have a guardian or payee who manages your money? (if yes, contact with this person is essential).
- Do you think you need help in money management such as making sure the rent and utilities are paid and that you have money for emergencies? Do you know of community services or resources that could help you with this?
- Are you willing to apply for housing subsidies and assistance, waiver services? (The housing specialist brings to this discussion a complete background in what it takes to be eligible for these benefits.)
- Do you want help in finding, getting, and/or keeping a living situation?
- Do you have friends or family who could/would help?
- What extra help do you think would be useful to you in the process?

## **Develop a Written Plan**

All the decisions people make, and all of the resources and supportive services that the person will use, should be laid out in the individual's Independent Living Plan. The plan is created by the housing specialist and the person together. Others who may have input into the plan include people working on the support team, family members (when appropriate), and other allied providers.

The plan is focused on choosing, getting, and keeping housing in the community. While it can and should include a plan for accessing needed support services, this plan is

about housing. The plan should be very specific and should always include clear statements about who will do what, by when. It should include:

- Actions that the person will take on his or her own behalf;
- Actions the housing specialist will take;
- Additional supports that the program will provide; and
- Details about the services and supports that will be pulled together from various sources to help the person succeed.

In addition, the plan should include some way to evaluate whether the goals have been met. In other words, it should specify milestones or short-term goals to be reached, and it should describe in clear terms what successful outcomes will look like.

### **Spending plan**

Part of the written plan for moving out of an institution is the development of a spending plan. A sample form is included in Appendix B. At this point in the process, the spending plan is a concrete way to talk about income, “have-to” expenses and “want-to” expenses. This tool can identify areas where the housing specialist can start looking for additional resources. For example, in completing this form, it might become apparent that rental assistance would make the difference in terms of having enough money to move and live in the community. The housing specialist is the expert on resources and can share what it will take to apply, how long it might take to get assistance, and how the individual can be actively working towards their goals even if housing is several months in the future. The housing specialist identifies gaps in the budget and works with the individual to develop a plan for making the budget work. The housing specialist is the expert in what it will take and how to get it; the person is the expert on what they want and need, and what their timeline is for moving.

### **Support plan**

Preliminary planning for supports and services begins with a detailed discussion of the kinds of supports and services the individual receives now. Once the housing specialist has a complete picture of the current situation, it is helpful to ask – what is missing from your current supports and services? It is also helpful to know if there are things in the current plan that the individual can do without. For example, the institutional setting offers 24-hour staff support. It might be possible for the person to use fewer hours (say, 12 hours) or more intensive supports provided at specific times.

In addition to the supports and services an individual may need to get along outside the institution, the housing specialist may help the person think about a comprehensive array of services focused on real life in the community. These could include:

### **General Supportive Services**

- Help in moving and getting settled.
- Help in setting goals and developing plans.
- Help in meeting obligations of tenancy and avoiding eviction.
- Intervention in cases of domestic violence and securing a safe environment.
- Training in assertiveness and how to get involved in tenant issues.
- Linking to activities in the community, including worship services and recreational activities.

### **Vocational Services**

- Exploring job skills, possibly help in finding a job.
- Arranging education and training, such as computer classes.
- Support and coaching.

### **Practical Issues**

- Help in making sure the rent is paid on time.
- Preventing and resolving conflicts.
- Training in independent living skills such as shopping, laundry and cooking, if needed.
- Coaching regarding safety issues.
- Help in facilitating access to public transportation.
- Help in applying for and maintaining benefits.

### **Health/Behavioral Health Services**

- Help in arranging routine visits with physicians and dentists.
- Receiving nutritional counseling.
- Linking to community-based mental health services.
- Education about mental illnesses, medications, and treatments.
- Help in developing a system for taking medication and reporting any side effects.
- Getting referrals to treatment programs.
- Help in finding drug- and alcohol-free recreational activities.
- Linking with peers who can provide support or self-help groups such as Alcoholics Anonymous (AA).

## **Develop a timeline**

Once you have the information from the spending plan and the support plan, it is important to work with the person to develop a timeline. A written timeline, with lists of what needs to be done by the person and the housing specialist, does two things. First, it provides a map of what needs to happen. And, it provides the person with a real reason to hope – it allows all involved to keep track of what has been done and to celebrate progress towards moving day. It also provides a realistic framework and can work as a checklist for things to do. It is important that the person has a copy of it, and can make changes as time moves forward. Templates of timelines are included in Appendix B.

## **Finding Housing—How to Prepare**

A housing specialist must be familiar with a wide variety of sources for housing to help the person create a realistic moving plan. Those resources are described in detail in Chapters 2 and 5, and include public housing, privately held housing, nonprofit sponsored housing, tax credit units, and other affordable housing developments. While some people may choose assisted living or specialized housing for the elderly, most people leaving institutions choose scattered-site, tenant-based units. In that case, the job of a housing specialist involves helping tenants find housing from a wide variety of sources.

Many people who are leaving an institution have very little money. The average income of a person receiving SSI is \$750/month, and the average rent for a one-bedroom unit is \$970 per month (NLIHC, *Out of Reach*, page 1). While there are local variations, in general, people with SSI as their source of income require financial assistance to live in regular, integrated housing.

The housing specialist's job includes many hours of up-front work in this area. Making connections with private landlords, understanding the application processes and approaching managers of subsidized housing, the housing authority, and other affordable housing developments that should be done ahead of any conversation with prospective tenants.

For people on SSI, these are the general categories of housing that are possible:

**TABLE 3: Housing Options for People With and Without a Subsidy**

Type of Housing	Without a Subsidy	With a Subsidy
Landlord-controlled housing (private market)	Usually not possible; if the individual is willing to pay 50% or more of their income for rent, and the housing market is depressed, this might be possible.	Housing Choice Vouchers are accepted by some landlords. For privately developed housing, there is no requirement that landlords accept government rental assistance. Tax credit units must accept vouchers.
Public housing authority/agency housing	N/A: All PHA operated units are subsidized.	PHAs often operate their own housing. Issues might be waiting lists and safety.
Specialized housing for elderly and people with disabilities	N/A: All of the units in this type of housing are subsidized.	Not every community has this type of housing. Issues include waiting lists, concentration of people with disabilities or people who are elderly (not integrated).
Government-assisted affordable housing developments (such as tax credits)	Tax credit units are designed for people who have very low incomes. People on SSI may still be too poor to afford the unit without a subsidy, but possibly could if they can/will pay more than 50% of income for rent, or if a particular development has units set aside for people with disabilities or people with extremely low-incomes.	In general, units that have been built using government assistance have the requirement that Housing Choice Vouchers and other housing assistance must be accepted.

### Working with landlords

The housing specialist needs to identify landlords that might become partners in efforts to help people move from nursing homes and other institutions. Building a network of landlords is more art than science – it is often a labor-intensive process of learning about apartment complexes in the community that are affordable. Some communities offer web-based or other electronic data bases of available housing units. Another source of information is rental listings in the newspaper. There is no substitute for old-fashioned research, including phone calls to likely apartment complexes and driving by places that seem possible.

A housing specialist needs to know what the current rent is for units of different sizes, whether landlords accept housing vouchers, the number of accessible units and their rents, and whether the landlord has or may have vacant units. Also, it is important to

understand the type of housing controlled by the landlord. If the property was developed with private funds (banks, for example), then the landlord has no legal obligation to accept low income households. If, however, the property received government assistance during development, the landlord has some level of legal obligation to serve low income households.

The housing specialist can find out which apartment complexes or affordable single-family housing were assisted with government funding by checking with the city and county government – usually a city office containing the words *housing* and/or *community development*. A phone call to that office can lead to a list of assisted housing in your community. Moreover, the State Housing Finance Agency may also keep a list of assisted properties in your community.

Building relationships with landlords is essential to the housing search, and this should be part of the up-front work done by the housing specialist. Part of the job here is to offer friendly, educational information about people with disabilities living in the community, as well as information about the role of the CIL and how it can assist the consumer and the landlord. Even more important, the housing specialist talks with landlords about having reliable tenants and a steady source of rent.

There are many tools available to help craft outreach materials to landlords. For example, see materials from the United States Interagency Council on Homelessness (USICH) at [www.usich.gov/solutions/housing/landlord-engagement/](http://www.usich.gov/solutions/housing/landlord-engagement/).

## **Working with public housing authorities**

Before the housing specialist begins working with people who want to move, he or she needs information about the Public Housing Authorities in the community. As with landlords, the housing specialist's task here is to gather accurate information and to establish working relationships up-front.

Some, not all, PHAs operate their own units of housing. Public housing generally has its own set of eligibility requirements, rules and regulations, and guidelines. Individuals may have to go through one or more specialized eligibility determination processes to get into public housing. Sometimes there are long waiting lists for the units. Another issue with public housing is that the quality can vary greatly, depending on how well the PHA has rehabilitated, renovated, or maintained the units. Public housing projects can be of good quality, or they may be physically run down and very dangerous settings. In some cities old dilapidated housing projects are being replaced by brand new mixed-income settings; in other communities, people eligible for public housing are being given priority access to a small number of units of housing set aside for people who are in "special populations," which may include people with disabilities. It is a good idea for the housing specialist to visit the public housing unit and get to know staff that control waiting lists and the property managers.

Some, not all, PHAs operate Housing Choice Voucher programs. Vouchers also have eligibility requirements and usually have even longer waiting lists than public housing units. However, some communities have developed special set-aside pools of vouchers for people with disabilities, or people who are transitioning out of nursing homes. The website, [www.affordablehousingonline.com](http://www.affordablehousingonline.com) allows you to sign up for alerts when housing authority waiting lists open and close. The website also offers a list of affordable and subsidized housing in a community. This is a good place to start, but the information is not always complete. You need to do your own research.

### **Finding other affordable housing options**

It is important to know ahead of time whether the waiting list is open or closed. A closed list means that new names cannot be added to the list. This indicates that the PHA has a long backlog of eligible people already waiting for housing. If the PHA list is closed, the housing specialist should make a note to check on the status of this every few months. If the list opens, the housing specialist needs to be ready to submit names of qualified candidates, usually within a short time frame.

Whether the PHA voucher waiting list is open or closed, part of the housing specialist's preparation is to learn about the process, collect eligibility information, applications, and lists of required documentation. Even more important, the housing specialist should reach out to staff that control the HCV eligibility process, and inform them about the prospective tenants. The housing specialist, again, might emphasize that people with disabilities are often good tenants.

### **Tenant preparation**

Often, people with disabilities who have been living in nursing homes and other institutions may need help in learning or re-learning how to be a good tenant. This includes giving tenants current information about costs, teaching people about leases, and talking to people about how to approach landlords and neighbors.

A housing specialist needs to prepare program participants to make successful contacts with landlords or property management companies because they will be meeting landlords/managers when they visit the units. To increase the likelihood of a successful outcome, the housing specialist might coach people about how to approach a landlord. You can role play with the person and help him or her practice asking and answering routine questions. These might include "How much is the rent? How big is the unit? How many people live in this apartment complex? Do you allow pets?" As people practice interviewing to secure housing, they will gain skills and self-confidence. Role playing can help people do well in an interview with potential landlords.

Another area of preparation is helping prospective tenants understand the lease. A standard lease typically describes the responsibilities of the tenant and the landlord. Basically, tenants must pay rent, keep the unit reasonably clean, may not damage the property, and may not interfere with their neighbor's right to use and enjoy their units.

Landlords must provide a safe environment, ensure that utilities work, and enter the property only for specific reasons and only after reasonable notice is given.

## **Overcoming barriers**

Many people who have lived in institutional settings have barriers to qualifying to lease an apartment. The most common barriers are a poor credit or rental history or a total lack of credit or rental history. Centers for independent living across the country have come up with creative ways to address these issues and help a tenant qualify for a lease.

If a person has no recent credit or rental history, the housing specialist will need to be creative in demonstrating that the prospective tenant is a good risk from the landlord's perspective. If the person has ever lived in housing, it might be possible to find old utility bills or phone bills to demonstrate a positive credit history, even if it is several years old. If the person has never lived in housing, it might be possible to use enrollment or completion of a training program as a way to show reliability and stability. When individuals have supportive families, it might be possible to have a relative or friend co-sign for the lease.

Some programs may receive donations that allow for payment of deposits, old utility bills, and pet deposits (for example, for service animals). Agencies and programs sometimes hold the lease on behalf of the tenant. This arrangement is designed, typically, to be a temporary solution while the tenant builds a credit rating and tenant history. Agencies may guarantee the rent up to a certain amount so that the landlord's financial risk is minimized.

Finally, it is possible to use the reasonable accommodation provisions of the Fair Housing Act to ask landlords and housing authorities to waive requirements for income and credit and rental history. See Chapter 4 for more details.

## **Summary**

Careful planning and preparation by the housing specialist and the individual is essential to long-term success! A successful transition depends on the quality of the relationship between the person and the housing specialist. A realistic assessment of what it will take to move, and the strengths, abilities, and resources the person brings to the effort are necessary to good planning. Part of developing a step-by-step plan is to look at both finances and needed supports. Working on a spending plan will help the person learn about what is needed to support their move. Taking a close look at needed supports helps prevent problems after the move.

The housing specialist should use the planning and preparation time to become an expert in the local housing market. An effective housing specialist will have drawers full of rental applications; sample leases; utility applications; information about phones, computer lines, cable TV; and other necessities. Housing specialists know the people

who work at the Housing Authority and have built a network of friendly landlords. Housing specialists have information for the community they are working in and for surrounding communities. Sometimes, subsidized housing or a HCV will be available in the county but not in the city, in a smaller town but not in a big city, etc. Helping people to make informed choices means being an expert on all the options!

This chapter has focused on what the person and the housing specialist can do to prepare for the transition. Resources to assist you are found in Appendix B. These include:

- Accessibility Considerations Checklist
- What Will It Cost to Move In? Costs and Assistance Worksheet
- Planning Ahead: What to Think About and Do in the Months Before You Move to a New Place
- Monthly Personal Spending Plan
- Getting Along with Your Landlord: How to Be a Good Tenant
- Getting Along with Others: How to Be a Good Neighbor

## Chapter 4: How to Choose Housing

This chapter provides information about how to facilitate and support choice. For people who have spent time in a nursing home or other facility, the process of choosing can be exhilarating and frightening at the same time. The housing specialist's job is to support the person as they begin to believe in the reality of choice, give enough information so that the person is making informed choices, and provide real services and supports throughout the process.

It is important to approach choice in an intentional way. People who live in nursing homes and other institutions may not have much practice in making important choices. It is not enough to ask "What do you want to do?" Real choice is facilitated by an exploration of needs and preferences. When that process is completed, prioritizing needs and preferences is the next step. Often, the person may need practice and support in communicating these choices to family, nursing home staff, and others.

### Identifying Housing Preferences

Some people have little or no idea of the kinds of housing options or support services they want and may not know what options are available. Many people have had their options so limited that they find it hard to express preferences, and some people lack basic knowledge or exposure to options and need more knowledge before they can understand the full range of choices. The housing specialist must be skilled at helping people who lack exposure and information about their housing and support options to explore the housing and support services that are potentially available to them.

*Preferences* are what a person really wants or desires, without taking into account the particular resources that are currently available. One of the first preferences to consider is the type of housing a person likes. The types of housing that are valued in one area of the country will likely be different from those preferred by people in another area of the country. For example, people living in New York City, where housing units are usually expensive and generally small, and where most people live in large high-rise buildings, will look very different from the preferences described by people living in, say, Phoenix, Arizona, where low-rise residential buildings are the norm and housing units often are more spacious. In some places, mobile homes are normal housing used by many people, while elsewhere they don't exist or are seen only as a substandard housing option. Even within a given geographic location, individual preferences will differ, and preferences may look very different for people from different neighborhoods or from different cultural or ethnic groups.

Residential stability (whether or not people stay in housing) and people's life satisfaction increase when they feel they had choices and when their housing and support preferences are honored. Thus, there are several sound reasons why it is so important for the housing specialist to be able to skillfully assess a person's housing and support service preferences and actively support people in making their own choices.

There are a few basic approaches that are helpful in exploring housing preferences. Personal preferences tend to represent or reveal a person's values. Preferences often are shaped by what a person is familiar with in terms of local housing styles and options and in terms of a person's cultural or sub-cultural norms, as well as unique personal preferences. You can use either a conversational style or a more formal questionnaire to assess preferences.

### **Use a conversational style**

To use a conversational style of assessment, you will want to set sufficient time aside to ask each potential or current consumer several open-ended questions that will begin to identify their housing and support service preferences. You will need to talk about and explore the individual's thoughts and dreams about the kind of place in which they would like to live. This step moves beyond the preliminary conversations described in Chapter 2, and begins the process of creating some specific detail about the housing desired. Some of the questions fall into the following categories:

- **Living Arrangements:** Do you want a house, apartment, condominium? Do you like neighbors to be close or do you value privacy more? How do you feel about shared living? If you chose shared living, would you want a private bedroom? Access to the kitchen? A private bathroom?
- **Living with others:** Would you share a living space (apartment, house)? Would you like a housemate? If yes, are you hoping that they will be a tenant, a friend, backup in case of emergency? Would you like a housemate that is also a romantic partner? Do you have family members you would like to live with?
- **Housing features:** Do you want to have air conditioning, an inside laundry room, first-floor unit, do you mind climbing stairs, will you have a car that you need to park? Do you want or need modifications to the housing? What are they?
- **Safety and visitors:** Would you like to live in a gated community? Would you like your friends to come and go as they please?
- **Neighborhood:** Do you have a specific neighborhood in mind? What kind of neighborhood sounds good – lots of trees, near shopping, public transportation? Do you want to be near specific places like family members, church, doctors' offices?
- **Personal support needs:** Do you need/want personal assistance services? If yes, how much, for what purpose, when? Will you hire your own workers? Do you need help cleaning, cooking, managing money? Do you use or need to get personal adaptive equipment?
- **Animals:** Do you have or want to get a pet? What kind? Do you have or will you want a service animal?

- Alcohol and other drugs: Do you want to live in a community that supports sobriety? Do you want freedom to do as you please on this issue? How do you feel about being in a setting where some people may be using drugs and alcohol?
- Activities: What kinds of social events do you like? Do you keep your own company or are you a social person? Do you like sponsored activities (movies, for example) or would you just like to go alone or with a friend?

It is best to have this conversation over a series of informal meetings. It might be intimidating for the person to feel that they have to answer all these questions at once. The housing specialist needs to understand that hearing the question might be the first time the person has considered the issue. Asking again another time, after the person has had a chance to really think about it, might result in more valid answers.

### **Use a questionnaire**

Another way the housing specialist can learn about a person's housing and support service preferences is by using a structured survey or questionnaire that asks similar questions. The benefit of using a questionnaire is that it can be left with the person, and allows the person time to review all of the areas for consideration. See Appendix B for a sample questionnaire. How questions are phrased can affect the answers. Consider this when creating a questionnaire and test your questions on friends and co-workers to see if they yield the types of answers you are looking for.

### **Educate people about options**

At this point in the process, the housing specialist has a wealth of information about housing options in the community. All of the preparation work described in Chapter 2 begins to pay off here.

Some people already will have very clear personal preferences about the kinds of housing and supports they think they want or need, but other people will have little or no idea and may not know what options are available. Choice involves having multiple options from which to choose, but when a person finds it hard to express preferences, the housing specialist can begin by educating individuals about the different types of housing available, including how much a typical unit will cost and the ins and outs of applying for different options.

The housing specialist might use any or all of the methods listed below to explore housing options with prospective tenants.

- Describe the kind of housing and support options available.
- Show the person several options, by driving the person past some of the places where others with similar needs and preferences live.

- Visit housing sites and tour the building's facilities and a vacant unit, if one is available.
- Some individuals who are living in the community may agree to have potential tenants make a brief visit to their housing/home. This allows individuals to talk to another person who is succeeding in the community and see the person's living situation. Having role models for success is important.
- Peer support organizations have found that many people are interested in seeing the positive stories of others like themselves, who face similar challenges, and who are living successfully and more independently in their community. There are a number of videos and books that provide this information.

## **Prioritizing Needs and Preferences**

Once the housing specialist and the person have identified a fairly solid picture of needs and preferences, the next step is to discuss what is most important. For example, the housing specialist might ask: would you be willing to sacrifice having your own apartment in order to live in the neighborhood of your choice, or is having your own place your biggest priority? Would it be worth an extra \$25 every month for you to have a pet? It is possible to use the worksheet or written plan and rank highest priorities number one, two, three, and so on. Priorities should be based on what the person needs and wants.

It is at this point in the process that informed choice starts to become real. The housing specialist and the person might take this opportunity to review the written Independent Living Plan for housing, including the spending plan. Adjusting the written plan to include the prioritized needs and preferences might cause an adjustment to the plan. For example, the person might have identified "Meadowlark Apartments" as the place she most wants to live. After exploring her needs and preferences, and filtering those through the spending plan and the other information, she might decide that instead of that particular apartment complex, she would like to live in a house that would accommodate a service animal with no deposit and allow her to park free.

Again, this is a process that cannot be rushed. The individual is making a series of life-changing decisions, and it is necessary and appropriate that sufficient time be allotted to completing the process. Indeed, taking time to make decisions also allows the housing specialist to help the person work through complicated application processes for housing and services, and to mark time on waiting lists before resources are available.

## **Communicating Needs and Preferences**

Once needs and preferences have been identified and prioritized, it is important to begin to communicate about them, outside of the housing specialist relationship. In particular, needs and preferences should be communicated to family, friends, and staff

of the facility. Beyond this circle, communication must begin with care providers, housing providers, and others who can be helpful partners.

A note about communication--an individual who has spent many months or years in a nursing facility or other institution may lack practice at communicating decisions. Here are some helpful hints that the housing specialist can use to support the choices of the prospective tenant.

- Make sure that a list of needs and preferences, as well as the overall written housing plan, is kept by the person. Having it written down can help avoid confusion, and the person can use the written materials to help reduce the concerns of significant others.
- Help the person rehearse conversations. Role playing a difficult conversation may help the person be more confident about communicating needs and preferences.
- Teach the use of “I” statements. The housing specialist can teach this communication style. For example, instead of saying “You need to find me my own apartment,” someone could say, “I want to have my own apartment because I have had negative experiences with abusive settings and need my privacy.”

## **Help Potential Tenants Select a Unit**

Visiting available units with the potential tenant is another common task undertaken as a part of the housing specialist’s role. Again, this is where the extensive research described in the previous chapter is helpful.

## **Locating housing options and facilitating choice**

A good first step in looking at actual units is to have a notebook filled with pictures of apartment complexes, houses, and neighborhoods to show or describe to prospective tenants. Looking through the book is an opportunity to see actual possibilities, and compare those possibilities to the needs and preferences already identified. At that point, you can start to identify actual areas of the city for further exploration.

It is essential that the person get a sense of the community, beyond paper and pencil. A driving tour, with neighborhoods and landmarks marked on maps, is one way to help the person become familiar with the community. Regular outings, for coffee or to explore shopping, laundry and other amenities, also allow sufficient familiarity for the person to make an informed choice.

Too often, people who have lived in nursing homes for many years are tempted to agree to the first realistic option offered. It is important to help people slow down and make a decision that matches the needs and preferences identified. The goal is to

maintain housing and if the person is not happy, they will not be invested in maintaining their living situation.

Sometimes it is a challenge to find a housing unit that is accessible, in decent shape, affordable, and in a safe neighborhood. Even with a housing subsidy, people with very low incomes often have to make tradeoffs and are frequently restricted to marginal or poorer parts of their community because of the limitations placed on rental assistance. As the housing search progresses, the housing specialist might suggest that the consumer keep these tips in mind:

- Try to avoid unsafe areas, slum-style blocks, or dangerous neighborhoods.
- Try to find areas characterized by racial and ethnic diversity. These neighborhoods might be quite socially accepting; people with disabilities have often achieved more social integration in such surroundings than other neighborhood types.
- Sometimes over-saturation of a particular neighborhood with people with disabilities, ex-offenders, or others with service needs can lead to a strong community backlash. The goal is to integrate socially but not over-saturate a given area. The person must make the choice – this is another “trade-off.”
- Neighborhoods may change dramatically depending on the time of day. Some areas that are quite good during the day become very dangerous later in the evening or during the night. People with disabilities can be especially vulnerable to assault in high crime areas, and they have vastly higher rates of criminal victimization than do people without disabilities. Try to visit the area at different times of day to see what it is like.

Other factors that need to be considered when assessing the housing and the surrounding environment include:

- Accessibility, for people with physical limitations.
- Availability of safe places to play, for families with children.
- Access to public transportation within reasonable distance.
- Shops and stores within reasonable distance.
- Parks or coffee shops within reasonable distance.
- Access to naturally occurring community resources, such as a public library, within a reasonable distance.

### **Talking to landlords**

You can help prepare consumers to make successful contacts with landlords or property management companies about housing units. To increase the likelihood of a successful outcome, it might be helpful to review Chapter 2. When on the way to meet landlords, you might actively coach people and remind them about the kinds of

questions to ask, and the kinds of questions they will be asked. Rehearse the answers. This last minute coaching, if done in a supportive and encouraging manner, can be a real boost to self-confidence.

### **Making contact with the landlord or rental agency yourself**

Role playing can help people do well in an interview with potential landlords. However, in some cases you may need to make contact with the landlord or rental management firm first, or instead of the person. Most landlords are open to having you negotiate with them about a unit and may welcome referrals and will be willing to work closely with you. Some landlords will even lower the rent or waive a deposit for an individual, if you have a good relationship with the landlord or property manager. This works particularly well in depressed rental markets or in units that may be less desirable to market-rate tenants. This does not mean you should accept a sub-standard unit though. All units should meet standards for safety and cleanliness.

### **Obtaining leases and rules**

As you approach the end of your search, you will need to help individuals navigate the lease. A lease is a legal agreement between the landlord and the tenant that specifies the obligations that each party has to the other. A lease is for a specific period of time, usually either six months or one year. This is one of the easiest to negotiate points in the lease. Other items may be more difficult.

Many landlords use a standard lease agreement. Because tenant/landlord law differs from place to place, a model lease will differ across the country. You can call the local tenant's council, apartment association, the local or state housing agency or look online for a typical lease for your location. A large apartment complex, property management company, apartment locator service, or Realtor® will also probably give you a sample lease if you explain what you are doing.

In some instances, people will be asked to undergo a credit check or a criminal record check as part of negotiating a lease. It can be difficult for a person with a criminal record, a bad credit rating, or a history of evictions to obtain a lease from a private landlord. It is important to know ahead of time if the program participant has any of these problems. Ideas for overcoming these issues are provided in Chapters 2 and 4. Typical sections of a lease include:

- A requirement that the tenant pay rent on time.
- A requirement that the tenant keep the unit up to a decent standard of cleanliness.
- A requirement that the tenant does not “disturb the peace.”
- Rules regarding pets, visitors, subletting, and alterations of the unit.

- Delineating who is responsible for utilities such as heat, lights, water, and refuse removal.
- How repairs will be handled.
- How the landlord can gain access to the unit, either in an emergency or for ongoing maintenance.

In some areas of the country landlords allow people to rent month-to-month, without a formal lease. Either party (landlord or tenant) can end the rental agreement with 30 days' notice. This may or may not be advantageous, depending on the individual's circumstances. As a housing specialist, you should make sure you are familiar with what is considered standard in your area and be on the lookout for any unusual or overly restrictive terms.

## Summary

At this point, the housing specialist and prospective tenant have accomplished a lot. They have identified needs and preferences, the housing specialist is working on pulling together the resources needed to make the move (more about that in Chapter 5), and all of this research and activity pays off in the selection of an acceptable housing unit that the person can afford. To assist you in this effort, three items are included in Appendix B:

- Thinking about Housing Needs and Preferences
- What Do I Want in a New Place?
- Pros and Cons of Housemates

## Chapter 5: How to Get Housing

This chapter covers the nuts and bolts of finding housing including where to look for affordable housing for your consumers. We will also cover reasonable accommodations under Fair Housing law and will explain in detail about applications, waiting lists, and leases.

Many sources of subsidized housing that will be available to the people you are serving are administered by public housing authorities (PHAs), Housing Choice Vouchers, privately held subsidized housing, and Tax Credits.

### Working with Public Housing Authorities

PHAs are created by state and local governments for the purpose of owning, managing and operating affordable rental housing. There are more than 3,400 PHAs in the U.S. serving approximately 1.3 million households. PHAs typically have either public housing units or operate the housing choice voucher program, or both. PHAs also can apply for and must be the administrator for other voucher programs such as the Mainstream Vouchers or VASH vouchers (see Chapter 2).

A PHA determines eligibility using these criteria: 1) annual gross income; 2) whether the person qualifies as elderly, a person with a disability, or as a family; and 3) U.S. citizenship or eligible immigration status. If an individual is eligible, the PHA will then assess each tenant to determine if they are “qualified.”

HUD may determine that a household is not eligible. Typical reasons for denial include insufficient income, a criminal background, previous evictions from public housing, and any documented behaviors that could be expected to have a detrimental effect on other tenants or on the project. It is important to know that most of the requirements for a qualified tenant are determined locally and can be adjusted locally. Also, if the reason for the denial is related to a person’s disability, a reasonable accommodation can be requested on a case-by-case basis.

You can locate the PHA in your area by visiting the HUD website at [www.hud.gov/program\\_offices/public\\_indian\\_housing/pha/contacts](http://www.hud.gov/program_offices/public_indian_housing/pha/contacts). Click on your state and a list of all the PHAs organized by location will pop up. The address and phone number for each PHA is given. In addition, some PHAs have websites of their own where you can find basic information. After you have located your local PHA, check to see which, if any, apartments they own, where they are located, what criteria exist for qualifying and what other programs your PHA operates. A phone call to the PHA will usually tell you who is eligible for their housing, and how to pick up an application or get on the waiting list.

Not all PHA housing is apartment style. Some PHAs create single-family houses, while others build townhomes. Local style and preferences vary widely. Public housing

projects can be of good quality, or they may be physically run down and in dangerous settings.

As a housing specialist, you must be familiar with your local PHA. Things you should know include:

- Where are the public housing units, and what are they like?
- How long is the waiting list for the Housing Choice Voucher (HCV) program?
- What are the eligibility requirements for public housing and HCV?
- Are there online applications?
- How does someone get and stay on the waiting list?
- Are there preferences for people with disabilities or people who are transitioning out of nursing homes?

There are separate waiting lists for public housing and for HCV, as well as for any other programs the PHA manages. People may have to go through one or more specialized eligibility determination processes to get into each of these programs. It is important to get on waiting lists as early in the transition process as possible. Long waiting lists mean that people can wait quite some time before they can move. Even if the assessment and planning process are not complete, the tenant can begin “marking time” on the list while the two of you work together to iron out the details of a possible move. Keep in mind that people may apply to many different PHAs and be on many waiting lists at the same time.

The first step to getting on the waiting list and ultimately obtaining a voucher or entry to a public housing unit is successfully completing an application – sometimes known as a “pre-application.” Each PHA has its own policies regarding when applications are accepted and in what manner they are collected and processed. Some PHAs require interested applicants to pick up and drop off an application in person. Some PHAs allow an applicant to mail or fax a written application into the PHA. The housing specialist must know where the PHAs in his or her area are, and what their policies are.

The application process often poses significant barriers to people with disabilities. Many people with disabilities have difficulty completing the application, understanding the deadlines, or obtaining help with the process. However, a person with a disability may request a change to the PHA’s policies for accepting voucher applications if this difficulty is related to the disability. A PHA must provide assistance completing an application if a person with a disability requests help. For example, a person who is visually impaired may request a reasonable accommodation from the PHA regarding application procedures. The accommodation can take many forms such as Braille or electronic format, or that a PHA or CIL staff might read and help fill out the application.

A person with a disability may want to include a contact person such as an advocate, service provider, family member, or friend on the application. The applicant can request that this person receive a copy of all PHA correspondence.

In many communities, voucher waiting lists are extremely long and can result in lengthy waiting periods. Many PHAs' lists are "closed" and have been for many years. Unfortunately, lists that are very old may include applicants who can no longer easily be contacted. Because a PHA must try to locate each applicant on the waiting list before moving on to the next person, old waiting lists can mean long delays in getting vouchers to people who need them. Many PHAs regularly update their waiting lists in order to verify who is still interested. Some PHAs do it once a year, or even as often as every six months. In order to update their waiting lists, PHAs send out letters to applicants asking them to reconfirm their interest in the voucher program. Often these update letters require the applicant to respond by a certain date. If the PHA does not receive a response, the application is removed from the list automatically. Through this process, PHAs eliminate any applicants who do not respond appropriately to the update letter or who are no longer interested in the program. The majority of PHAs correspond with voucher applicants via the mail, so it is critical that any change in address or contact information be relayed promptly to the PHA. As mentioned above, it may be helpful for the individual to include a secondary contact on the application and request that the PHA copy this person on all correspondence.

Tenants live in housing controlled by local landlords who own rental property or housing units in the private or open housing market, meaning that the housing is available for rent to anyone in the community. These units may or may not be subsidized. Many housing specialists, especially those working in depressed rental markets, have been able to work with landlords to obtain housing for their consumers. Some landlords will waive fees, make modifications, or even lower the rent for the right tenant. Often if a landlord knows that a social service organization may help negotiate or remedy any problems caused by a tenant, he will be more likely to rent the unit to someone who may have no credit, poor credit, or other issues with housing history.

You can improve your chances of finding suitable homes by building good relationships with a network of local landlords. You will want to identify local landlords who accept housing subsidies and who have housing units that meet the Housing Quality Standards (HQS) required by your local PHA to qualify for rental with a Housing Choice Voucher. These standards are available from local PHAs and follow general guidelines established by the U.S. Department of Housing and Urban Development (HUD).

## Finding Housing

This section gives step-by-step instructions about how to explore housing resources that are available in your community. You will want to—

- Know about PHA resources, both vouchers and public housing.
- Know about resources available through HUD’s Consolidated Plan programs.
- Know more about HUD Continuum of Care resources for people who are homeless.
- Have a complete list of HUD multifamily subsidized housing.
- Have a complete list of tax credit properties in your community.
- Know about USDA multifamily housing (if you are in a rural area).

It is important for the housing specialist to have comprehensive knowledge of these resources in order to help individuals looking for housing. You are the expert.

The housing search may include multiple communities and multiple counties. Many CILs serve rural areas, or may have a mix of urban, suburban and more rural counties. On a practical level, that means your research must include these areas.

You may end up creating your own database of local resources, or you might have several government databases at your fingertips. Your community may have a local search engine that indicates whether units are subsidized, accessible or accept vouchers.

If you don’t have a local resource, try <https://affordablehousingonline.com/>.

This website gives you a starting point, including a list of subsidized units, “affordable” units, and information about your PHA(s). You can sign up for alerts from this website, including notices of when PHA waiting lists are opening and closing.

### **PHAs**

The first step is to find your PHA(s). Remember, you may have more than one PHA in your region.

Go to [https://www.hud.gov/program\\_offices/public\\_indian\\_housing/pha/contacts](https://www.hud.gov/program_offices/public_indian_housing/pha/contacts).

Click on your state. A list will come up which gives PHA contact information and tells you if the PHA operates “low-rent” housing (public housing units) or “Section 8” (the housing choice voucher program), or “combined” (both types of program). If you have more than one community/county in your region, search for the names of the communities/counties you are interested in. You may also find regional housing authorities listed. Add all of the PHAs in your region to your list.

Then, you will need to look at their website. The PHA contact list has the PHA website listed; if this is not accurate a google search for the PHA by name will usually get you to the website. On the website, you should find information about the programs they operate. PHAs operate their basic programs of public housing units, HCV or both, but remember they can also operate discretionary programs. Under vouchers, you should look for Mainstream Vouchers, VASH vouchers, "Non-Elderly Disabled" vouchers or Family Self-Sufficiency vouchers. Under housing units, you are looking for public housing units, but also look for other multifamily units. PHAs can develop or operate housing units in different categories. These other units will also be below market rate.

The presence of programs beyond the bare minimum tells you two things. First, this PHA is in good enough standing with HUD to successfully apply for these programs. Second, this PHA is actively participating in responding to community need.

The next step is to start the labor-intensive process of reaching out to staff at the PHA. You might call with friendly questions, ask to meet with the director of housing or the director of HCV/Section 8. You are creating a relationship with people, even if a waiting list is closed.

### **Consolidated Plan Programs and Resources**

Cities above 50,000 in population and counties above 250,000 in population develop a Consolidated Plan (ConPlan) that governs the allocation of four types of formula-based resources. The ConPlan describes how the community will spend dollars in these programs:

- Community Development Block Grant (CDBG)
- HOME
- Emergency Solutions Grant (ESG)
- Housing Opportunities for People with AIDS (HOPWA)

Cities receiving CDBG must have in excess of 50,000 in population. Urban counties above 250,000 in population also receive these funds. Cities at or above 75,000 in population and urban counties over 250,000 also receive HOME funds. Depending on factors such as need for homelessness services, concentration of poverty or prevalence of AIDS, your community may also receive ESG and/or HOPWA funds.

What can these programs do?

- CDBG: Activities that develop viable communities by providing decent housing, a suitable living environment, and opportunities to expand economic opportunities, principally for low- and moderate-income persons.
- HOME: Supports a wide range of activities including building, buying, and/or rehabilitating affordable housing for rent or homeownership or providing direct rental assistance to low-income people.

- ESG: Funds essential services related to emergency shelter and street outreach, emergency shelter operation and renovation, short-term and medium-term rental assistance, housing relocation/stabilization services (rapid re-housing) for those who are homeless or at risk of homelessness.
- HOPWA: Funds services and housing for people with AIDS.

To find out how much money your community received in 2019, go to:  
[https://www.hud.gov/program\\_offices/comm\\_planning/about/budget/budget19](https://www.hud.gov/program_offices/comm_planning/about/budget/budget19).

This takes you to a US map; click on your state. This brings you to an excel spreadsheet showing how much your community received in 2019. These are annual allocations administered by your local city/county. The next step is to find out how these dollars have been spent, and what is the plan for spending them in the future.

Each ConPlan participating jurisdiction creates a plan, which can be found at:  
[www.hudexchange.info/programs/consolidated-plan/con-plans-aaps-capers/](http://www.hudexchange.info/programs/consolidated-plan/con-plans-aaps-capers/).

This website allows you to view the ConPlans as well as performance reports for the jurisdiction. But your real information will come from personal contact with the people who are running the programs and planning process. In many jurisdictions, this is the Community Development, Affordable Housing or Neighborhood Housing departments. Call and ask! Every three to five years, a new plan must be developed, so a first question is when will the new planning process start for your community. ***This is an advocacy opportunity!***

In terms of resources, you want to know who has received money and for what purposes. This may lead you to non-profit developers who own and operate property developed for low-income households. They may be allies in your efforts to get good tenants into housing and may lead you to other sympathetic landlords. They may be willing to work with you on relaxing some criteria for tenants. For example, a frequent problem is that qualified tenants must earn three times the rent in income. This is difficult for households relying on SSI. But a friendly landlord may be willing to work with such a tenant, with your backing.

### **HUD's Multifamily Housing Inventory**

HUD has many programs designed to produce affordable housing. A subset of units produced with those programs are for "elderly or persons with disabilities". The inventory lists multifamily properties developed using HUD funds for these populations.

Go to [https://www.hud.gov/program\\_offices/housing/mfh/hto/inventorysurvey](https://www.hud.gov/program_offices/housing/mfh/hto/inventorysurvey).

This brings you to a website; click on your state. This brings you to a PDF document of all the HUD-funded subsidized housing in your state. You can search the PDF for your community by typing CTRL F and entering the name of the community in the search box. Or you can convert the document to Excel and search and sort using Excel.

Let's consider an example from Ohio. Click on the link above. Scroll down to the states list and click on Ohio. The occupancy eligibility column shows who is eligible to occupy the units. It will say "elderly", "elderly and disabled", "disabled", or "family". The family designation can include a family of one person. The table shows the total number of units, the total number of subsidized units, the number of designated units, and the number of accessible units.

Your next task is to review these properties. Do you know about all of them? If not, reach out to them, find out who is managing them, what the vacancy situation is, what the rent is, is there a waiting list, is there an application fee? Part of the goal is to gather information; part of the goal is to create a relationship with people controlling these resources.

### **HUD's Veterans Affairs Supportive Housing (VASH)**

The HUD-Veterans Affairs Supportive Housing (HUD-VASH) program combines Housing Choice Voucher (HCV) rental assistance for homeless Veterans with case management and clinical services provided by the Department of Veterans Affairs (VA). VA provides these services for participating Veterans at VA medical centers (VAMCs) and community-based outreach clinics. These vouchers must be administered by a PHA in your area.

The list is available here:

[https://www.hud.gov/sites/dfiles/PIH/documents/HUD\\_VASH\\_Awards\\_Sites.pdf](https://www.hud.gov/sites/dfiles/PIH/documents/HUD_VASH_Awards_Sites.pdf).

Find VA service sites at [www.va.gov/directory/guide/home.asp](http://www.va.gov/directory/guide/home.asp).

The first step is to see if your community has these vouchers. Remember, VASH is a discretionary program that the PHA can compete for and if they have not done so, and you have a community need, the advocacy task is to help persuade them to do so. If you do have VASH in your community, you want to be in touch with the housing authority and the VA service site. You want to know who is eligible to participate, what is needed to apply, what services are available and what is the wait for housing and services. Again, you are creating a connection as well as gathering information.

### **HUD Homelessness Assistance – the Continuum of Care (CoC) system**

HUD provides assistance to communities that is targeted to people who are homeless under HUD's definition of homelessness

([https://files.hudexchange.info/resources/documents/HomelessDefinition\\_RecordkeepingRequirementsandCriteria.pdf](https://files.hudexchange.info/resources/documents/HomelessDefinition_RecordkeepingRequirementsandCriteria.pdf)).

People who may qualify for programs funded here must be:

- Literally homeless – lacking a fixed, regular and adequate nighttime residence.

- At imminent risk of homelessness – residence will be lost within 14 days.
- Homeless under other federal statute – for example, unaccompanied youth.
- Fleeing/attempting to flee domestic violence.

Documenting the homelessness of an individual or family must meet federal requirements; review the written definition to be sure you understand it.

The planning process offers an opportunity to participate and participation can help raise awareness and perhaps inclusion in resources. The planning process results in annual awards of various types of housing assistance. This might include rapid rehousing dollars, designed to help households with relatively short periods of homelessness. Some awards provide housing for people with longer-term homelessness. Some of this assistance may be provided through a local PHA in cooperation with a service provider.

See awards through [www.hudexchange.info/programs/coc/awards/](http://www.hudexchange.info/programs/coc/awards/).

This link takes you to a US map; click on your state; scroll down the document until you see your community. If your community is not listed, you are covered under the balance of state awards.

The next step is to review the awards. Do you know these providers? Is this a system you are participating in? Find out who is the lead agency. If you can't find out easily through your local connections, you can see who on the funding list received planning or HMIS dollars. If they are not the lead agency, they will know who is. The lead agency can tell you how to get involved.

CoC systems must operate through a standardized assessment and a coordinated entry process. For people meeting the HUD definition, there are designated entry points where the assessment is conducted. This assessment typically yields a priority score, which is used to place the person in line for housing. If you have many people who meet the HUD definition, it might be worth it to participate in this process.

### **USDA Rural Development Multifamily Housing Inventory**

USDA provides millions of dollars in housing and community development funding to rural areas. More than 440,000 multifamily housing (MFH) rental units in 15,000 complexes provide safe and decent housing for more than 750,000 individuals who otherwise could not afford it. MFH also provides rental assistance on behalf of 270,000 low and very-low income families that enables those families to live in apartments financed through Rural Development.

Multifamily housing units developed with federal support should be more affordable than unassisted market rate units to people on SSI level incomes. In addition, some units have subsidies, which makes them even more affordable.

One of the best features of the USDA Rural Development program's website is immediate and specific access to the addresses and other information for assisted units.

To get specific information for rural communities, click on this link:

[http://rdmfhrentals.sc.egov.usda.gov/RDMFHRentals/select\\_state.jsp](http://rdmfhrentals.sc.egov.usda.gov/RDMFHRentals/select_state.jsp).

You will be directed to a US map; click on your state. You need to know the counties that you are interested in, and then the properties will be listed by county. Some states are so large that they are split into multiple regions on the map.

Your next step is to review the property lists. Do you know these units? If not, connect with the property managers listed on the website. What are their waiting lists? Rents? Turnover rate? Application fees? Again, this is about relationships as well as information.

### **Low-income housing tax credits**

Low Income Housing Tax Credits (LIHTC) fund the development of affordable housing in every state. Your state housing finance agency operates this funding program. The program creates a funding stream that supports the development of affordable housing. LIHTC developments are everywhere and are designed to have some units that are affordable for people at very low incomes (50-60% of median).

The only problem is that the provided assistance does not make units affordable to people on SSI incomes. So, someone on SSI might want to move in, but would have to have a voucher, or be willing to pay a higher percentage of their income towards rent.

The opportunity here is that these programs are required to accept vouchers, so it's important to know where the properties are for your voucher holders. A common problem for voucher holders is that they may have difficulty finding a unit; this is even more difficult for people who want an accessible unit. The tax credit list is a practical addition to the search for an acceptable unit.

HUD maintains a database of properties developed using LIHTC at:  
<https://lihtc.huduser.gov/>.

Your state housing finance agency should also maintain a list.

For example, see list for Oregon available at Oregon Housing and Community Services Agency, funded applicants – <https://www.oregon.gov/ohcs/Pages/multifamily-housing-funded-applicants.aspx>.

Your next step is to investigate the properties in your community and reach out to property managers. You offer these properties good tenants, people who will pay their rent! In some cases, tenants will have ongoing support from your organization, which

can be a selling point. Tax credit properties may have barriers built into the process they use to qualify tenants, but the remedies for that include reasonable accommodation.

To summarize: There are resources for housing in your community, and the housing specialist needs to have a comprehensive knowledge of those opportunities. People leaving institutions or exiting homelessness may not be prepared to conduct a housing search without your help. People who want to do their own search can benefit from your providing a starting point. The housing world can be complicated and overwhelming. We hope you have learned what you need from this manual and can assist people with housing more effectively.

## **Fair Housing and Reasonable Accommodations**

As mentioned in Chapter 1, the rights of people with disabilities to live in the community are covered by a variety of laws. Fair Housing is the most important of these as it prevents discrimination based on disability and requires landlords to make or allow reasonable accommodations so that the person has the full use of a particular unit. In this section we will cover how Fair Housing applies to obtaining a unit.

Once you have found housing that is acceptable to the individual and consistent with their personal plan, the next step is to help the consumer through the process of applying for housing and negotiating a suitable lease.

## **Fair Housing and the application process**

Keep in mind that while landlords cannot discriminate against someone based on his or her disability, landlords, housing managers, and PHAs are allowed to disqualify applicants who are not likely to be good tenants based on tenancy-related criteria such as:

- Ability to pay the rent and utilities on time and in full.
- Ability to properly care for the apartment.
- Will the tenant respect the rights of other tenants?
- Will the tenant engage in any illegal activity in the apartment?

Housing managers may legally ask questions to obtain this information. Often managers will request references from previous landlords or conduct criminal background or credit checks to collect information about the applicant's previous behavior. Applicants with poor tenant, criminal, or credit histories can be excluded from or screened out of housing. Applicants with no tenant history – those who have only lived with their families or in a nursing facility – are often also screened out.

## Reasonable accommodations and reasonable modifications

Once the tenant has found a unit and been accepted for occupancy, he or she may need help from the housing specialist in requesting a reasonable accommodation or reasonable modification. An accommodation is a change in the landlord's policies that enable a person with a disability to apply for, obtain, or live in housing. For example, a person might need to have a support person not listed on the lease stay overnight in the unit, or a person who lives in a "no pets" building might need a service animal.

Housing providers are not required to provide accommodations that are not considered "reasonable." An accommodation is not reasonable if it imposes an "undue financial and administrative burden" on the housing provider or would create a "fundamental alteration" in its programs or services. For example, a PHA must provide a larger voucher unit size for a person with a disability with a live-in aide. However, a PHA does not need to help hire the live-in aide for the household. Such a service would be a fundamental alteration to the PHA's program, which is to provide housing.

A reasonable modification is a physical change made by the tenant at the tenant's expense. For example, a person who experiences unusual fears might request a privacy fence, or a person who uses a wheelchair might want to mount the thermostat lower on the wall. The extent of the changes determines whether they are reasonable. Unless the housing provider receives federal subsidies, the tenant (or the housing program) must pay for the changes, and if applicable, pay to return the property to its original state when the tenant moves out. In housing that receives federal subsidies, Section 504 of the Rehabilitation Act requires the housing provider to pay for the modifications so long as doing so does not cause undue hardship or fundamentally alter the nature of the housing provider's business.

For more information on reasonable accommodations and modifications, see the United States Equal Employment Opportunity Commission website at [www.eeoc.gov/facts/accommodation.html](http://www.eeoc.gov/facts/accommodation.html)

Although each circumstance is different, people are more likely to require a reasonable accommodation on the basis of a psychiatric disability than a reasonable modification. The most likely case in which you will need to help a tenant request a reasonable accommodation is during the application stage. Often, tenants have either poor references from former landlords or no rental history, making potential landlords hesitant to rent to them, or making PHAs hesitant to provide rental assistance. You can ask the landlord for a reasonable accommodation that waives submission of a rental history. The landlord may deny your request, but it does not hurt to ask.

## A word about substance abuse and behavioral issues

Applicants who are disqualified because of behavior related to substance abuse or alcohol abuse (e.g., poor landlord references, criminal record for loitering) will need to demonstrate that the disqualifying behavior is disability-related; the applicant is no longer abusing substances (for example, by presenting a letter from an AA sponsor);

and there is a reasonable expectation that the behavior that was considered objectionable will not recur. Applicants who have lengthier or repeated substance abuse issues are likely to have a more difficult time demonstrating that their behavior has changed. It may also be important for the applicant to demonstrate that any criminal record is related to use of and not sale or manufacturing of illegal substances.

People with psychiatric disabilities might be disqualified from a unit for behavior that occurred when they were not taking medication or taking incorrect medication. For example, a tenant who hears voices when he does not take medications may demonstrate behavior that is unacceptable to a landlord such as repeatedly hitting the wall with a broomstick in order to “get the voices out”, and thereby destroying the walls. A tenant in this position might be able to diminish a previous landlord’s poor reference if he can explain the incident and provide evidence that he is currently on medication. As a housing specialist, you should be prepared to help tenants make their case to a potential landlord regarding special circumstances

### **Request reasonable accommodations**

Although people with disabilities who have poor tenancy histories may not qualify for housing under the same criteria used to evaluate most applicants, they are entitled to appeal a denial through any standard appeal process and to request a reasonable accommodation to become qualified for housing. It is the burden of the applicant and his advocates to request a reasonable accommodation and to present documentation to demonstrate that it is reasonable. For example:

*Sunchase Apartments has a policy of disqualifying applicants who have one or more poor landlord references. An applicant to Sunchase Apartments who has a disability and has a poor landlord reference may request an accommodation if (1) the behavior which led to the poor landlord reference was disability related, (2) the applicant can demonstrate that the behavior or situation leading to the poor reference no longer exists, and (3) the behavior or situation is not likely to recur in the future.*

Requesting reasonable accommodation for tenant qualifications is a “gray” area. It is often a judgment call as to whether or not the person is being disqualified based on their disability. Likewise, you may have to use your best judgment to determine if an individual’s undesirable behavior is likely to occur again. The landlord or PHA has the right to make that judgment. The applicant can appeal or file a discrimination complaint if they feel the request was reasonable but denied by the landlord or PHA.

Make sure that your consumers are aware of and follow local rules, whether that means mailing, faxing, or dropping off an application and how to inform the PHA of an address or contact information change. A person with a disability may request a change to the PHA’s policies for accepting voucher applications if this difficulty is related to the disability. For example, a person who is blind may want someone to read the application to him or her.

## Appendix A

### Ability 360: Successful Advocacy and Housing

Ability360, Phoenix's center for independent living, has created relationships with all levels of the housing industry to enhance the level of accessible, affordable, integrated housing for people with disabilities. A key to success is the work they did up-front to assemble facts about the housing market, accessibility, and people with disabilities that show that creating affordable, accessible units works for everyone – including developers and owners!

The need is overwhelming and urgent. Ability360's Information and Referral Coordinator receives over 300 calls monthly, with more than a third focused on housing issues. There are few affordable units, there is a backlog of requests for financial assistance, and accessible units are in short supply. What to do?

Ability360 did a comprehensive analysis of the situation, looking at the housing market for win-win opportunities. They discovered that the development of accessible units works for builders, owners, realtors and prospective owners and tenants. It is a long-term solution. As Darrel Christenson, Vice President of Community Integration, explains "Houses built in 2018 will last 50 years and Americans are moving an average of every seven years. That means there will be an average of seven families in and out of that house in a lifetime and chances are great that at least one of those families will utilize those [accessible] features." Also, as the population ages, additional households will require accessible features. Making all units in a development accessible makes them more marketable to a larger share of the population.

For example, Gorman and Company, a housing organization focused on downtown revitalization, the preservation of affordable housing, workforce housing, and the adaptive reuse of significant historic buildings (<https://www.gormanusa.com/>) approached Ability360 with plans to build a 28-unit multifamily housing development. Their plan was to have the minimum percentage of accessible units. After just one meeting with Ability360 staff, they were persuaded to make all 28 units accessible, and were so happy with the success of this development that they adopted the practice for projects in Miami, Milwaukee, and other communities. President/CEO Brian Swanton stated: "For those competitors of ours I'd say if you aren't being accessible you're crazy. It is a little more on the front end, but in the long run your costs to operate are lower and it makes complete business sense."

Ability360 has partnered with Valley Leadership ([www.valleyleadership.org/](http://www.valleyleadership.org/)) to increase information about accessibility in the Arizona Regional Multiple Listing Service (AZMLS). When the project started, the MLS had 16 fields in their database to describe the features of a garage, but zero information about disability and accessibility. Now there are 31 fields in the database. This system level change means that people will

now have an easier time finding accessible housing, and it has had the effect of raising awareness.

The partnership with Valley Leadership led to the development of educational materials, including a video (produced by Cox Communications). The video paints a compelling picture of the challenge that people with disabilities face in finding homes with accessible features and the lack of those homes in the marketplace. It speaks to all aspects of the housing industry and has been a successful outreach tool.

Most recently, Ability360 worked with five housing authorities, and was included in all five applications for HUD's Mainstream Vouchers. This has resulted in designated vouchers under the control of Ability360.

Ability360 is a leader in their community, and a national leader for the CIL community.

For more information, feel free to contact them:

Ability360  
5025 E. Washington St., Ste. 200  
Phoenix, AZ 85034-7439  
(602) 256-2245  
FAX: (602)-254-6407  
<https://ability360.org/>

## APPENDIX B

### Making the Move!

This Appendix focuses on practical tools for both the housing specialist and individual consumers as they navigate a move. Appendix B includes checklists, “how-to” fact sheets for the new tenant, and tips on keeping records. Each tool is meant to be hands on, please remove them from the Appendix, make as many copies as you need, and modify them for every unique situation.

Tools in this Appendix are ordered as follows:

1. Tools referenced in Chapter 2:

- Accessibility Considerations Checklist
- What Will it Cost to Move In? Costs and Assistance Worksheet
- Planning Ahead: What to Think About and Do in the Months Before You Move to a New Place
- Monthly Personal Spending Plan
- Getting Along with Your Landlord: How to Be a Good Tenant
- Getting Along with Others: How to Be a Good Neighbor

2. Tools referenced in Chapter 3:

- What Do I Want in a New Place? Self-Assessment Worksheet
- Do You Want or Need a Housemate?

3. Other useful tools:

- Wear and Tear – What Does This Mean?
- Move In/Move Out Checklist
- Moving Timelines:
  - Weeks before the move
  - One week before the move
  - One week before and one week after the move
  - What to do after you move

**Accessibility Considerations Checklist**

People need different kinds of accommodations to be successful in a new house, condominium, or apartment. Review the list of common accommodation requirements below and check those most important to you.

Consider which accommodations are absolutely necessary – critical, and which are desired, but not critical. Add any individual accommodations that you need that are not included in this list.

Consider which of the accommodations you expect the landlord to supply (such as an elevator or convenient parking place) and which are modifications you may request to supply yourself (such as a touchpad door lock).

Use this check list as you research and visit new housing options to help you to select a place that is safe, decent, affordable, convenient, comfortable, AND accessible.

Accommodation	Critical	Desired	Landlord Supplied	Tenant Supplied
<b>ACCESS TO COMMUNITY and COMMUNITY RESOURCES</b>				
Public transportation				
Covered waiting areas for public transportation				
Paved sidewalks				
Grocery stores and other shops				
Restaurants				
Parks and recreation areas				
Spiritual centers: churches, temples, mosques				
Social centers: fitness, clubs, social groups				
Professional and health services				
Neighbors very nearby				
Neighbors at a distance				
Friends/family in close proximity				
<b>ACCESSIBILITY TO UNIT and COMPLEX</b>				
First floor entrance				
Elevator nearby unit				
Covered parking near entrance				
Laundry resource within unit				
Easy access to complex laundry facilities				
Easy access to complex social centers, pools, fitness facilities				
Easy access to recycling and garbage disposal				
Curb-cuts and ramps				

<b>ACCESSIBILITY WITHIN UNIT</b>				
Single story or one floor lay-out in unit				
Easy access to kitchen, living room, bathroom, bedroom				
Wide doorways				
Carpet free				
Accessible design in kitchen:				
• Adequate open space for wheel chair turn				
• Lowered counter height				
• Easy reach to sink				
• Stoves with front (not top) controls				
• Adequate reachable storage				
Accessible design in bathroom:				
• Adequate open space for wheel chair turn				
• Bathroom safety rails by toilet				
• Roll in shower				
• 17-18" toilet height				
Lowered closet bars				
<b>SAFETY</b>				
Door peepholes at eyeball height				
Security locks on doors and windows				
Guarded entry				
Intercom				
Touchpad or keyless entry lock				
Flashing lights doorbell				
Accessible emergency evacuation exits				
Smoke detector for persons with hearing impairments				
<b>PERSONAL SUPPORT NEEDS</b>				
Service animal care				
Personal adaptive equipment				
Attendant care resources				
Other				

**What Will It Cost to MOVE IN?  
Costs and Assistance Worksheet**

<b>THE "PLACE"</b>	<b>LIVING OPTION 1</b>	<b>LIVING OPTION 2</b>	<b>LIVING OPTION 3</b>	<b>FINANCIAL ASSISTANCE AVAILABLE</b>	<b>NOTE</b>
Application fee					
Application deposit					
Credit report fee					
First month rent					
Last month rent					
Security deposit					
Condo-related fees					
Estimated cost of modifications needed					
<b>TOTAL "Place" Costs</b>					
<b>UTILITIES SET UP</b>					
Electricity					
Gas					
Oil					
Water/Sewer					
TV/Cable/Internet					
<b>TOTAL Utility Set-Up Costs</b>					

Appendix B

<b>HOUSEHOLD SET UP</b>					
First week groceries					
Basic cleaning supplies					
Basic kitchen					
Basic bedroom					
Basic living room					
<b>TOTAL Household Set-Up Costs</b>					
<b>MOVING COSTS</b>					
Truck/transport					
Helpers					
Storage if needed					
<b>TOTAL Moving Costs</b>					
<b>TOTAL COST</b>					
<b>Set-up and Rental Assistance Available</b>					
<b>DIFFERENCE Needed</b>					

**Planning Ahead: What to Think About and Do in the MONTHS Before You Move to a New Place**

Name: \_\_\_\_\_ Date: \_\_\_\_\_  
 Helpers: 1) \_\_\_\_\_ 2) \_\_\_\_\_ 3) \_\_\_\_\_

4 months	3 months	2 months	1 month	Moving Day
<p>To do this month: Thinking!</p> <p>Do I want to move? WHY do I want to move? What kind of place do I want? What kind of features or accommodations are needed and desired – my preferences? What has “worked” well for me in the past? What do I need to be successful? What didn’t work before?</p>	<p>To do this month: Researching &amp; Learning!</p> <p>What are my options? What does it cost? What are my resources? What money help do I need? Do I want a house-mate? Who? Do I need and can I afford cleaning services? If I need personal assistance, am I eligible for a waiver to help pay for it? How do I apply for a waiver?</p>	<p>To do this month: Exploring!</p> <p>What’s my budget? Begin looking at places What trade-offs must I make? What modifications am I responsible for? What household “stuff” do I need? What adaptive equipment will I need? Is the waiver in place? Begin organizing attendant care, if needed. Research cleaning services, if needed.</p>	<p>To do this month: Acting!</p> <p>Sign a lease Set up utilities Change of address Get the household “stuff” I need Get adaptive equipment I need Finale personal assistance schedule Contract for cleaning services, if needed Organize moving day</p>	<p>Moving Day!!! Doing it!</p>
<p>What I will do::</p>	<p>What I will do::</p>	<p>What I will do::</p>	<p>What I will do::</p>	
<p>Helper:</p>	<p>Helper:</p>	<p>Helper:</p>	<p>Helper:</p>	
<p>Helper:</p>	<p>Helper:</p>	<p>Helper:</p>	<p>Helper:</p>	
<p>Helper:</p>	<p>Helper:</p>	<p>Helper:</p>	<p>Helper:</p>	

<b>Monthly Personal Spending Plan</b>							
<i>(example – individualize to your circumstances)</i>							
<b>Name:</b>					<b>Month/Year:</b>		
<b>INCOME</b>	<b>Monthly</b>	<b>Week 1</b>	<b>Week 2</b>	<b>Week 3</b>	<b>Week 4</b>	<b>Week 5</b>	<b>TOTAL</b>
Employment							
Disability							
Other							
Other							
<b>TOTAL Income</b>							
<b>HAVE TO's</b>	<b>Monthly</b>	<b>Week 1</b>	<b>Week 2</b>	<b>Week 3</b>	<b>Week 4</b>	<b>Week 5</b>	<b>TOTAL</b>
Rent							
Groceries							
Utilities							
Debts/Obligations							
Transportation							
Medical Co-Pay							
Attendant care							
Adaptive equip. maintenance							
Service animal expenses							
<b>Total HAVE TO's</b>							
<b>What's Left?</b>							
<b>WANT TO's</b>	<b>Monthly</b>	<b>Week 1</b>	<b>Week 2</b>	<b>Week 3</b>	<b>Week 4</b>	<b>Week 5</b>	<b>TOTAL</b>
Telephone							
Cable/Internet							
Cigarettes							
Clothes							
Household							
Savings/Cushion							
Special							
<b>Total WANT TO's</b>							
<b>What's Left?</b>							
<b>PERSONAL Spending</b>	<b>Monthly</b>	<b>Week 1</b>	<b>Week 2</b>	<b>Week 3</b>	<b>Week 4</b>	<b>Week 5</b>	<b>TOTAL</b>

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## Getting Along with Your Landlord: How to Be a Good Tenant

Bottom line, being a good tenant means paying your rent on time; not damaging the property; and not disturbing neighbors. Here are a few tips:<sup>3</sup>

- Know and comply with the conditions of your lease or rental agreement.
  - If you don't understand any part of your lease, ask your landlord or someone else to explain it to you in clear language – BEFORE YOU SIGN IT! Keep asking until you fully understand what you are agreeing to.
  - Your job is to keep the agreements you make when you sign the lease.
  - Pay your rent on time – always. Late rent payments not only affect you and the landlord, they also may be reflected in your credit rating. If you need a referral from the landlord in the future, your on-time-payment record is an advantage.
  - Don't have a pet if it is not allowed in your lease. If you need a service animal, this should be discussed with the landlord as a reasonable accommodation under the Americans with Disabilities Act (ADA). If you have a pet or service animal, you are 100% responsible for the care of the animal, picking up after the animal outside, and to make sure that the animal does not disturb others.
  - Do not allow extra people to move in or “guests” to stay for long periods of time without discussing in advance with the landlord.
- Know your rights. Every state and many localities have landlord-tenant laws. Get a copy.
  - Become familiar with your rights as a tenant.
  - If you are a person with a disability, you also enjoy protections under the Fair Housing Act and the ADA. It is to your advantage to know these rights and make sure that others are aware and respect them.
  - If you have questions about your rights, contact your local Protection & Advocacy organization, a Public Housing Authority, Legal Aid or other attorneys, or other tenant groups in your community.
- Submit requests to your landlord in writing to avoid disputes and misunderstandings; keep copies of all correspondence.
  - Know who to call for what kind of problems. The landlord? Property Management organization? Friend who knows how to unplug a toilet?
  - Always get advance permission before doing something that affects the unit or other people in the area. This could include things such as painting a room a different color, getting a pet or housemate, or asking for accommodations and modifications under the ADA.

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<sup>3</sup> Adapted from: [http://www.ehow.com/how\\_2245277\\_be-good-tenant.html](http://www.ehow.com/how_2245277_be-good-tenant.html), [http://www.ehow.com/how\\_8078\\_be-tenant.html](http://www.ehow.com/how_8078_be-tenant.html) and other sources.

- Keep written records of ALL agreements, including requests and your landlord's responses to your requests. If the landlord does not reply to the request, keep records of the dates and times when you tried to contact the landlord or follow up on the request. Such records come in handy if you have a serious dispute with the landlord.
- Make sure you get receipts for your rent payments.
- Refrain from damaging the premises or allowing guests to cause damage.
  - It's a good idea to walk through the unit with the landlord before you move in. Note any pre-existing damage or problems together and sign an agreement that you both acknowledge the presence of these damages. Taking pictures can be of immense value. You don't want to be accused of something you didn't do!
  - Normal wear and tear is not "damage," but you and the landlord may have different ideas about what is "normal."
  - You are responsible for your guests. If they damage the apartment, it is your responsibility to fix it, not the guest. You may try to get your guest to pay for some or all of the cost, but the landlord will look to YOU to make and pay for repairs.
- Keep your rental unit clean, and properly dispose of garbage.
  - A dirty place hastens wear and tear on the unit... and invites unwanted insects.
  - Know where the proper garbage disposal area is and use it!
  - If you have a problem with something such as a plugged toilet, stuffed drain, or broken tile, contact your landlord immediately for assistance.
- Notify your landlord in writing of needed repairs to keep components in good working order.
  - Landlords typically prefer to make repairs when they are small rather than wait for something big. A leaky toilet is easier to fix than a floor that has rotted out because of a leaky toilet!
  - If you have questions about your responsibility for repairs versus your landlords, check your lease. If you still have questions, talk to the landlord. The landlord may want you to clean the spots on the carpet and change light bulbs, but he/she will fix the broken light socket.
- Allow your landlord to enter your rental unit for safety or maintenance reasons, with proper advance notice.
  - Every state has regulations about how much notice a landlord must give before entering an apartment in non-emergency situations for safety and maintenance. You will find these regulations in the landlord-tenant laws.
  - If you have a serious health condition, it can be useful to give the landlord or a neighbor permission to enter the apartment under specific conditions to check that you are OK (for example, they haven't seen you in 24 hours).

- Keep noise levels to a minimum.
  - If you like loud music or television, invest in a good set of headphones.
  - Many apartments have thin walls. You don't want to hear your neighbor's business and they usually don't want to hear yours, either. Keep your voice at a conversational level at all times.
  - If you have a loud neighbor who is disrupting your ability to enjoy your apartment, notify your landlord. Your neighbors are likely to do the same if your noise disturbs them.
- Purchase renter's insurance to cover your personal property in the event of loss.
  - Landlords are not responsible for replacing the contents of your apartment if it is lost, stolen, or damaged.
  - Renter's insurance is low cost and provides you with protection for your personal possessions including household items, electronics, and personal "stuff."
- Move out respectfully.
  - Give proper advance notice to your landlord about your intentions to vacate the property, according to the terms of your lease or rental agreement.
  - The landlord's positive referral will be valuable in securing housing in the future. How you leave the place impacts that referral.
  - When you are ready to leave, walk through the unit with the landlord to check for damages or repairs that may be needed in order to have your security deposit returned. Have a copy of the agreement you and the landlord signed listing pre-existing damages when you toured the apartment before you moved in. Remember the pictures you took when you moved in? Have them available now.
  - To ensure return of your security deposit, repair any damages incurred by you, repaired to landlord satisfaction.
  - If you made significant modifications to the unit while you lived there, you may be required by the landlord, and by the law, to return the unit to its original state at your expense. If you painted a wall purple, you need to paint it white again. If you installed a serious modification such as a roll-in shower, you may need to replace the original fixtures at your own expense. Under the ADA, your landlord has the right to require this restoration.
  - Make sure when you leave that the unit is "broom clean" – that is all personal items and trash are removed and the unit is swept out of dirt, appliances, cabinets and fixtures wiped clean of grime.

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## Getting Along with Others: How to Be a Good Neighbor

Bottom line, being a good neighbor means not doing things that disturb others around you. But there are benefits to being a good neighbor, including increased security and comfort for everyone. Here are a few tips:<sup>4</sup>

- Introduce yourself!
  - Introduce yourself to your nearest neighbors. Get off to a good start. Knowing people by name is always a good policy. Say hello and be friendly when you run into neighbors in the hallway, in common areas, or on the sidewalk. In times of difficulty, neighbors are often your first resource.
- Follow the Golden Rule: “Do to others as you would have them do to you.”
  - This is always the best policy. It is hard to complain about neighbors if you are guilty of the same attitudes or behavior.
- Maintain the area around your home so that it's neat and attractive.
  - Avoid lots of unsightly clutter, trash, or discarded objects in common areas such as hallways, yards, or around doorways. Safety is a concern (you don't want people tripping over things or trash drawing rodents), but so is the attractiveness of the area everyone shares.
- Be considerate about noises that might disturb your neighbors, such as vacuum cleaners, music, loud talk, and barking dogs.
  - The most common “neighbor problem” involves noise. In many communities, people live close together; apartments often have thin walls. If you like loud music or television, get a good set of headphones and wear them.
  - Some people have dogs for protection from intruders, but barking all day or during the night is disruptive for everyone. If you have a dog, it is your responsibility to keep him/her from disturbing others.
  - Be thoughtful about when you vacuum or mow the lawn. Avoid these tasks before 9:00 a.m. or after 8:00 p.m. If you have a neighbor that works a night shift, talk together about the best time for each of you to take care of these chores.
  - If you are going to have friends over or have a party, make sure the noise is “off” by 10:00 p.m. If the party is just getting started at that time, consider taking the group out to a more public setting such as a restaurant or community area where the noise will not disturb others.
- Respect privacy.

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<sup>4</sup> Adapted from: [http://www.ehow.com/how\\_3428\\_be-tenant.html](http://www.ehow.com/how_3428_be-tenant.html) and other sources.

- Do not assume it is OK to “pop” in to a neighbor’s place uninvited. Some neighbors become friends and friends may decide this is acceptable to do. Do not assume it upfront.
- Not everyone wants or needs to know all your business. Keep casual conversations focused on general issues unless and until the neighbor gives you clues that he or she wants to develop more of a friendship.
- If the neighbor gives you signals that they do not want a friendly relationship with you, respect that choice. But continue to be courteous and friendly to them.
- If you have a neighbor that wants to be more friendly than you do, respectfully let them know that you want them to respect your privacy. Set limits, say how, but do both with courtesy.
- Be helpful.
  - To the degree that you can, be helpful to others. For example, help the elderly neighbor carry her groceries. You never know when you might need help from one of your neighbors!
- Respond to their concerns.
  - Remember that people have different backgrounds, needs, values, and comfort zones. If you want them to respect yours, you also need to respect theirs.
  - If a neighbor comes to you with a complaint or concern, listen to them fully and try to understand the situation from their point of view. Offer suggestions for things you can do to address their concern. Always look for “win-wins” and follow through! Agreeing to keep the TV quiet at night and then not doing so, only makes the problem bigger.
- Deal with difficulties.
  - If you have a problem with a neighbor the first step is to politely talk with them about it and look for a solution that will work for both of you. Yelling at the neighbor about his noisy dog doesn’t do anyone any good. A good solution usually involves everyone giving a little bit in order to come to an agreeable solution.
  - If you have approached your neighbor about problems you have with them and they do not respond to your polite requests to respect those around them, try contacting the appropriate officials, such as the rent board or your landlord (if you share the same landlord).
  - If they still don't comply, consider calling the police if you think your neighbors are breaking the law with respect to you or your property.

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## Thinking about Housing Needs and Preferences

This form asks questions that are helpful to consider as you begin the process of changing your housing arrangements. Think about the questions for yourself and then talk them over with others.

### Why Do You Want to Move?

These questions ask you to consider where you are now, what you like about it, why you are thinking about moving.

1. Where do you live now?
2. What do you like about where you live now? – *For example: Neighborhood, Kind of housing (apartment, family home, condo); Living with people; Living alone; Availability of services and shops; Food and cleaning services provided.*
3. Why are you thinking about moving? – *For example, People may move to live away from family; Get more space; Move away from problem housemates; Have more autonomy and responsibility; Live in a more attractive place; Find a safer neighborhood; Changes in accessibility needs; Changes in family size from marriage/divorce/births; Find a more affordable place; Get “sober” housing; graduating from a treatment or residential program; Health concerns.*
4. What changes would you like to make in your living situation?
5. What do others (such as family, friends, and service providers) think about your moving? Do they support and encourage the idea? Discourage it? Why?

### What Resources Do You Have to Help You Move?

These questions ask you to think about what resources you have to help you finance a new place. Just because you do not have all the money necessary doesn't mean you cannot move. It does mean that you and your supporters need to explore resources that might be available to help you out.

1. How much do you think you could afford to pay each month for rent and utilities?
2. Do you have some personal financial resources such as income from a job, Veteran's pension, or disability payment?
3. Do you have a guardian or payee who manages your money?
4. Do you think you need help in money management such as making sure the rent and utilities are paid and that you have money for emergencies? Do you know of community services or resources that could help you with this?
5. Are you eligible for housing subsidies and assistance, waivers? Do you know what kinds of financial assistance might be available to you?
6. Do you want/need help in finding, getting, keeping a living situation?

7. Do you have people who can help you find, get, keep a different living situation such as friends, family members, supportive service providers?
8. What extra help do think would be useful to you in the process?

## What Do I Want in a New Place?

This is the time to think about all the things that you want in a new place: the location, the physical space, how close you want to be to other people, services, and shops.

Most people do not live in a place that is “perfect” – that is, meets their every hope or desire. We make trade-offs and try to get those things that are MOST important to us.

**Think about each of these items and how important they are to you. Ask yourself, Is this something that is “non-negotiable” -- an absolute necessity? Or, is this something that is “negotiable” – something you’d like to have, but would trade off if necessary to get something more important?**

Item	Comment/Notes	Absolutely critical, non-negotiable	Desired, but negotiable	Not Important at this time
<b>Living Arrangement</b>				
Would you like to live in a house? Apartment building with a few units? Apartment complex with many units?				
Would you prefer to live very close to other people or away from other people?				
Is a building with private bedrooms and shared kitchens acceptable?				
Is a shared bathroom in the hall acceptable?				
Would a bathroom shared by 1 or 2 other people be acceptable?				
Would you prefer living around only women? Men? Mixed men and women?				
Would you prefer living around only people about your age?				

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Item	Comment/Notes	Absolutely critical, non-negotiable	Desired, but negotiable	Not Important at this time
Would you prefer living around people without disabilities? With disabilities?				
OTHER:				
<b>Alone or with Housemates?</b>				
Would you prefer living by yourself or with other people?				
Have you ever lived in a place where you had a housemate and shared expenses such as rent/utilities? What did you like/dislike about it?				
Is there any specific person you'd like to live with— a girlfriend/boyfriend, family member, or a friend?				
Would you share an apartment if you had your own room?				
Would you like a housemate to share expenses? Be a friend? Be available in case of emergency?				
Would you like a housemate who is also a personal care attendant?				
OTHER:				
<b>Features</b>				
What features in a home are important to you—air conditioning, dishwasher, onsite laundry, etc.?				
Do you want a first-floor unit or something not on the first floor?				
Is walking up a flight or two of stairs acceptable?				

Appendix B

Item	Comment/Notes	Absolutely critical, non-negotiable	Desired, but negotiable	Not Important at this time
Do you need any special accommodations for a physical or sensory disability: ramps, elevators, doorbell signalers				
Do you have or expect to have a car? Do you need parking?				
Do you prefer a place with lots of windows and light or a place with fewer windows and more privacy?				
What else is important: A place to garden? People who speak the same language nearby?				
OTHER:				
<b>Safety and Visitors</b>				
Do you like having company? Do you want to have overnight guests? How often?				
Would you prefer to live in a place with a guarded entry? Intercom?				
Would you prefer to have visitors "screened"? Would you like your neighbor's visitors "screened"?				
OTHER:				
<b>Neighborhood</b>				
Do you want to live in a specific neighborhood? If so which one? Why?				
What features of the neighborhood are important to you? Examples: parks and recreation, well-lit streets, shopping, libraries, or public transportation.				

Appendix B

Item	Comment/Notes	Absolutely critical, non-negotiable	Desired, but negotiable	Not Important at this time
Do you need easy access to a specific place - a job, treatment facility, place of worship, family home?				
Do you like a neighborhood with lots of activity and interesting things going on or something quieter?				
OTHER:				
<b>Personal Support Needs</b>				
Do you need daily personal attendant care?				
Would you like to have personal attendant care available on-site any time of the day or night?				
Do you often need quick-response medical emergency assistance?				
Do you need help with keeping your living space clean? Doing laundry?				
Do you like to cook? How often? Do you mind cleaning up after cooking? Do you need help planning and preparing meals?				
What other type of supports do you need? For example, managing money, paying rent on time, shopping, or remembering medication.				
Do you have/need personal adaptive equipment that needs to be installed in a new place?				
Are there special accommodations or modifications you need in a new place?				
OTHER:				

Appendix B

Item	Comment/Notes	Absolutely critical, non-negotiable	Desired, but negotiable	Not Important at this time
<b>Pets and Service Animals</b>				
Do you have a pet? What kind?				
Do you want to have a pet? What kind?				
Do you have or expect to have a service animal? What kind?				
OTHER:				
<b>Alcohol and Other Drugs</b>				
Is a community that strongly supports sobriety important to you?				
How do you feel about being in a setting where some people may be using drugs or alcohol?				
OTHER:				
<b>Activities</b>				
Would you like to have access to nearby groups and social activities?				
Do you like the idea of having sponsored activities like trips and movies?				
OTHER:				



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## Pros and Cons of Housemates

As with most things in life, there are positive things and negative things about having a housemate. Here are a few things to keep in mind as you are making your housing plan.

### Good Things about Having a Housemate

- It might be a way to afford to live in an apartment.
- You can split the cost of rent and utilities.
- You can share chores like cleaning.
- A housemate can be a support and companion.
- Most people live with other people – it’s a “normal” thing to do.
- A housemate may have “stuff” that you don’t have and you may have “stuff” that he/she doesn’t have.

### Downsides of Having a Housemate

- You have to rely on someone else for their share of the costs like rent and utilities.
- You may not like how they do things, their “style,” behavior, or attitudes.
- Their problems can become your problems.
- You may not like their friends.
- You have less privacy because you have to share common areas such as kitchen and living room.
- You have to figure out how to deal with disputes and differences.

### What to Look for in a Housemate

- Someone you like.
- Someone you trust and feel safe with.
- Someone who keeps agreements.
- Someone who pays their share of the bills.
- Someone with the same tolerance for “clean” and “dirty” that you have.
- Someone who will not let their friends or family take advantage of the place.
- Do you want someone who smokes? Is clean and sober? Likes to party?

### **What to Avoid in a Housemate**

- Someone who smokes if you don't. Someone who doesn't smoke if you do.
- A "night person" if you are a "day person."
- Someone who plays music you cannot stand.
- Someone who drinks or drugs, especially if you are clean and sober.
- Someone who steals or lies or has a reputation for lots of problems.
- Someone who frightens or worries you.
- Has allergies to animals if you want to get a pet. (Has pets if you have allergies).

### **Should You Have a Live-in Attendant?**

The same pros and cons above apply to a live-in attendant, but there are additional issues to consider:

- Organizing finances: rent in exchange for services? Payment applied to rent?
- Expectations for working and non-working time.
- Expectations for social interactions: Is all housemate social time also attendant work time?
- Negotiating and contracting so that neither person feels "taken advantage of."
- Role confusion and boundaries: when are you an employer, a housemate, a friend?
- Housemate problems can affect sense of safety, attendant care availability and quality.



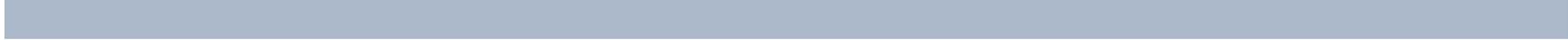
## What is “Ordinary Wear and Tear”?<sup>5</sup>

Landlords are permitted to deduct from security deposits for damage or excessive filth, but not for ordinary wear and tear. But what is ordinary wear and tear? Here are some examples.

Ordinary Wear and Tear: Landlord's Responsibility	Damage or Excessive Filth: Tenant's Responsibility
Curtains faded by the sun	Cigarette burns in curtains or carpets
Water-stained linoleum by shower	Broken tiles in bathroom
Minor marks on or nicks in wall	Large marks on or holes in wall
Dents in the wall where a door handle bumped it	Door off its hinges
Moderate dirt or spotting on carpet	Rips in carpet or urine stains from pets
A few small tack or nail holes in wall	Lots of picture holes or gouges in walls that require patching as well as repainting
A rug worn thin by normal use	Stains in rug caused by a leaking fish tank
Faded paint on bedroom wall	Water damage on wall from hanging plants
Dark patches of ingrained soil on hardwood floors that have lost their finish and have been worn down to bare wood	Water stains on wood floors and windowsills caused by windows being left open during rainstorms
Warped cabinet doors that won't close	Sticky cabinets and interiors
Stains on old porcelain fixtures that have lost their protective coating	Grime-coated bathtub and toilet
Clothes dryer that delivers cold air because the thermostat has given out	Dryer that won't turn at all because it's been over-loaded
Toilet flushes inadequately because mineral deposits have clogged the jets	Toilet won't flush properly because it's stopped up with a diaper

Are marks on walls and baseboards from wheel chairs considered “ordinary wear and tear”? Typically, but you should discuss and negotiate with your landlord about how ADA regulations may affect “normal wear and tear” definitions and expectations.

<sup>5</sup> Adapted from: <http://www.nolo.com>.



**Example Move-In/Move-Out Check List<sup>6</sup>**

This move-in/move-out checklist is hereby made a part of the Rental Agreement dated \_\_\_\_\_ by and between \_\_\_\_\_, the Owner/Agent, and \_\_\_\_\_, the Resident, for premises located at \_\_\_\_\_

Move-In Date \_\_\_\_\_ Move-Out Date \_\_\_\_\_

Inspection Date \_\_\_\_\_ Inspection Date \_\_\_\_\_

1. This checklist is to be completed by the Owner/Agent upon the Resident moving in and moving out of the residence. The Resident is encouraged to be present during inspections.
2. The Resident shall have 3 (three) days after taking possession in which to amend this checklist to include any further defects in the property which were unnoticed at the lime of the Move-In Inspection. The Resident agrees that failure to notify the Owner/Agent of such further defects in writing within the time specified shall be proof that there are no further defects and that in fact the Resident has accepted the premises, its furnishings, and appliances in good and satisfactory condition except as noted.
3. Upon vacating the premises, The Resident shall have the premises in the same or better condition as when accepted by the Resident, reasonable wear expected.

	MOVE IN			MOVE OUT	
	NEW	GOOD	OTHER	CONDITION	CHARGE
<b>KEYS</b>					
• Mailbox					
• Door					
• Dead Bolt					
• Other					

<sup>6</sup> Adapted from: <http://www.buyincomeproperties.com/html/RentalMoveInOutChkLst2.html>

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	MOVE IN			MOVE OUT	
	NEW	GOOD	OTHER	CONDITION	CHARGE
<b>KITCHEN (Including Cabinets) – Clean</b>					
• Refrigerator - Clean & Working					
• Stove - Clean & Working					
• In-Sink Garage Disposal - Clean & Working					
• Chips or Cracks in Kitchen Appliances					
• Condition of Countertops					
• Condition of Cabinets					
• Fan, Filter & Hood - Clean & Working					
<b>BATHROOM – Clean</b>					
• Towel Bars and Shower Rod Secure					
• Paper Holder Secure					
• Tub & Sink Stoppers Work					
• Plumbing Working Properly					
• Condition of Caulking					
• Condition of Tiles					
• Fan – Clean & Working					
• Mirrors clean					
<b>HEATING AND AIR CONDITIONER</b>					
• Clean & working					
• Furnace filters					

Appendix B

	MOVE IN			MOVE OUT	
	NEW	GOOD	OTHER	CONDITION	CHARGE
<b>DOORS work properly</b>					
• Door knobs work					
• Door locks work					
<b>WINDOWS work properly</b>					
• Windows clean					
• Screens					
• Storm windows					
• BROKEN/CRACKED windows					
<b>CONDITION of doors, window frames</b>					
<b>CONDITION of woodwork</b>					
<b>CARPETS</b>					
• Condition including cleanliness					
• Burns, tears, stains					
<b>WALLS surfaces – Clean</b>					
• Not repainted or wallpapered					
• Condition of walls					
<b>ELECTRICAL outlets work</b>					
• Cover plates on outlets					
<b>SMOKE detectors work</b>					
<b>OTHER</b>					
• CURTAIN RODS & fixtures					
• BLINDS & shades					

Appendix B

	MOVE IN			MOVE OUT	
	NEW	GOOD	OTHER	CONDITION	CHARGE
• RUBBISH removed					
• LIGHTING fixtures & bulbs					
• VENTS & registers work					
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•					
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COMMENTS:

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By signing our name below I/we accept the Move-In/Move-Out Checklist as a part of the rental agreement and agree that it is an accurate account of the condition and contents of said premises and acknowledge receiving a copy hereof. I/we also agree to pay for any damages to the property and contents other than normal wear.

RESIDENT: \_\_\_\_\_ DATE: \_\_\_\_\_

RESIDENT: \_\_\_\_\_ DATE: \_\_\_\_\_

MANAGER: \_\_\_\_\_ DATE: \_\_\_\_\_

**Planning Ahead: What to Think About and Do in the WEEKS Before You Move to a New Place**

Name: \_\_\_\_\_ Date: \_\_\_\_\_  
 Helpers: 1) \_\_\_\_\_ 2) \_\_\_\_\_ 3) \_\_\_\_\_

4 weeks	3 weeks	2 weeks	1 week	Moving Day	First Night
<p>To do:</p> <ul style="list-style-type: none"> <li>• Tour and double check accessibility.</li> <li>• Submit written request for accommodations and modifications.</li> <li>• Sign lease.</li> <li>• Set up utilities.</li> <li>• Schedule movers.</li> <li>• Line up helpers for packing.</li> <li>• Notify old landlord of departure.</li> </ul>	<p>To do:</p> <ul style="list-style-type: none"> <li>• Begin packing low-use items.</li> <li>• Sell/donate things you don't need.</li> <li>• Create Emergency Evacuation Plan.</li> <li>• Hire/schedule attendant care.</li> <li>• Set up communications: telephone, cable, YTD.</li> </ul>	<p>To do:</p> <ul style="list-style-type: none"> <li>• Confirm movers.</li> <li>• Notify movers of special needs, e.g. adaptive equipment transport.</li> <li>• Contract for cleaning services, if needed, to clean old place before departure, and provide ongoing services at new place.</li> </ul>	<p>To do:</p> <ul style="list-style-type: none"> <li>• Pack everything except most needed items.</li> <li>• Walk through old place with landlord to make sure you can get security deposit back.</li> <li>• Confirm schedule for attendant care.</li> <li>• Give post office change of address so mail will be forwarded.</li> <li>• Confirm utility set-up dates.</li> <li>• Make a "first night" plan.</li> </ul>	<p>To do:</p> <ul style="list-style-type: none"> <li>• Walk through new apartment with landlord – note pre-existing condition or damage.</li> <li>• Pack last minute things such as toiletries.</li> <li>• Make sure old place is clean, lock door, return key.</li> <li>• Transport "stuff."</li> <li>• Set up critical items: bed, adaptive equipment, personal items.</li> <li>• Arrange furniture and unpack much "stuff" away as possible.</li> <li>• Organize food/drink for helpers.</li> </ul>	<p>To do:</p> <ul style="list-style-type: none"> <li>• Follow your "first night" plan, which could include:</li> <li>• Call a friend.</li> <li>• Have an "unpacking" party.</li> <li>• Order pizza.</li> <li>• Go to bed early and prepare for big unpacking day tomorrow.</li> </ul>
What I will do:	What I will do:	What I will do:	What I will do:	What I will do:	What I will do:
Helper:	Helper:	Helper:	Helper:	Helper:	Helper:
Helper:	Helper:	Helper:	Helper:	Helper:	Helper:

**Planning Ahead: What to Think About and Do  
in the DAYS Before & After You Move to a New Place**

**Name:** \_\_\_\_\_ **Date:** \_\_\_\_\_  
**Helpers: 1)** \_\_\_\_\_ **2)** \_\_\_\_\_ **3)** \_\_\_\_\_

7 days	Day and Night Before Move	Moving Day	First Night	Days 2 - 7
<p><b>To Do:</b></p> <ul style="list-style-type: none"> <li>• Pack everything except most needed items.</li> <li>• Walk through old place with landlord to make sure you can get security deposit back.</li> <li>• Confirm schedule for attendant care.</li> <li>• Give post office change of address so mail will be forwarded.</li> <li>• Confirm utility set-up dates</li> <li>• Make a “first night” plan.</li> </ul>	<p><b>To Do:</b></p> <ul style="list-style-type: none"> <li>• Make sure everything is ready for moving day.</li> <li>• Finish packing everything except overnight needs/toiletries.</li> <li>• Clean out refrigerator and discard food not being moved.</li> <li>• Make sure old place is clean and any needed repairs made.</li> <li>• Confirm helpers for moving day.</li> <li>• Say good-bye to neighbors/housemates.</li> </ul>	<p><b>To Do:</b></p> <ul style="list-style-type: none"> <li>• Pack last minute things such as toiletries.</li> <li>• Make sure old place is clean, lock door, return key.</li> <li>• Walk through new apartment with landlord – note pre-existing condition or damage.</li> <li>• Transport “stuff.”</li> <li>• Set up critical items: bed, adaptive equipment, personal items.</li> <li>• Arrange furniture and unpack much “stuff” away as possible.</li> <li>• Organize food/drink for helpers.</li> </ul>	<p><b>To Do:</b></p> <ul style="list-style-type: none"> <li>• Follow your “first night” plan, which could include:</li> <li>• Call a friend.</li> <li>• Have an “unpacking” party.</li> <li>• Order pizza.</li> <li>• Review emergency plan.</li> <li>• Go to bed early and prepare for big unpacking day tomorrow.</li> <li>• Make sure you have night lights so you won’t get confused looking for bathroom at night.</li> <li>• Anticipate different sounds, lights, furniture arrangements in new place.</li> </ul>	<p><b>To Do:</b></p> <ul style="list-style-type: none"> <li>• Settle in: unpack and put away all “stuff.”</li> <li>• Purchase or acquire needed “stuff” such as cleaning supplies, chair, equipment.</li> <li>• Make sure adaptive equipment is set up correctly and working.</li> <li>• Notify healthcare and other service providers about new address/ telephone.</li> <li>• Introduce yourself to neighbors.</li> <li>• Address any problems in attendant care.</li> <li>• Organize for accommodations and modifications, as needed.</li> <li>• Learn locations and transportation routes to new shops and services.</li> </ul>

Appendix B

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What I will do::				
Helper:	Helper:	Helper:	Helper:	Helper:
Helper:	Helper:	Helper:	Helper:	Helper:
Helper:	Helper:	Helper:	Helper:	Helper: