



Toolkit for Developing and Operating Supportive Housing

The purpose of this *Toolkit* is to provide organizations with access to tools, informational materials, and sample documents that can help them address key challenges in the planning, development, and on-going operation of permanent supportive housing projects. This *Toolkit* currently contains more than 150 informational pieces, tools, and sample documents.

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I. Understanding Permanent Supportive Housing

Supportive housing is a successful, cost-effective combination of affordable housing with services that helps people live more stable, productive lives. Supportive Housing is permanent housing - people who live in supportive housing sign leases and pay rent, just like their neighbors. Further, supportive housing is a proven, cost-effective way to end homelessness for people who face the most complex challenges. By providing chronically homeless people with a way out of expensive emergency public services and back into their own homes and communities, supportive housing not only improves the lives of its residents but also generates significant public savings.

The documents in this section provide an overview of supportive housing, including identifying its defining features and exploring key principles and elements of successful supportive housing projects:

Tools for Understanding Permanent Supportive Housing:

- **About Supportive Housing:** This document provides an overview of the definition of supportive housing, the need for supportive housing, and research that has documented its effectiveness.
- **What is Supportive Housing?:** This document provides CSH's perspective on the role of supportive housing in addressing homelessness, the priority on creating supportive housing for persons experiencing long-term homelessness, and the range of effective housing models.
- **Key Principles of Supportive Housing:** This document reviews core principles that providers need to consider in order to provide high-quality housing that can address the housing stability and health and human service needs of their tenants. These principles include housing affordability, safety and comfort, and services that emphasize residential stability and empowering tenants to live independent lives.
- **Five Elements of Successful Supportive Housing:** This document highlights the five elements without which supportive housing projects cannot succeed – People, Place, Support Services, Money, and Organization
- **Sample Goals for Supportive Housing:** This document provides examples of goals and/or outcomes that supportive housing providers often establish for their housing projects - and measuring success in achieving such goals is an important strategy for demonstrating the benefits of supportive housing to the community.
- **Service Philosophies in Supportive Housing:** This document briefly examines the philosophical approaches often found within successful supportive housing programs and informing all aspects of their operations, including philosophies emphasizing housing first, voluntary services, consumer-driven program design, and approaches to working with people with substance use issues.
- **Toolkit for Ending Long-Term Homelessness:** This document provides a description of CSH's Toolkit for Ending Long-Term Homelessness, which highlights the most promising practices for serving people who have been homeless for months and years on end, including profiles of supportive housing programs and projects across the country that are successfully housing people who have been homeless for the long term, interactive photo tours of eight of these projects, and sample documents.



II. Development and Finance

The tools in this section are designed to help address key issues related to developing and financing new supportive housing projects, including assessing organizational capacity, putting together the development team, assembling the necessary financing, identifying an appropriate site for development, and structuring the deal for success.

A. Assessing Capacity

Identifying an Appropriate Development Role

Organizations deciding whether to develop new supportive housing units, and determining the right role for their organization, should start with a careful assessment and analysis of their capacity to successfully engage in such work. The first fundamental question that an organization has to ask itself is: *“Will this development project help us pursue our mission?”*

For any organization without development experience, and especially for an organization whose previous history has been focused primarily on advocacy or service delivery, the immersion into their first development experience can represent a dramatic change in the basic character of the organization. It is essential to consider these factors:

- Development work may become an all-consuming undertaking for some or all of the organization’s staff;
- Development fees are seldom sufficient to cover all the real costs incurred (including the costs for staff time and the opportunity costs this represents) over the entire length of a development project; and
- The Board of Director’s must be willing to invest staff and Board time, money, organizing effort and political capital to ensure the success of the project.
 - Once a supportive housing project is built, it must be operated, managed and maintained for the rest of its useful life, which could be 30, 40, 50 years, or longer, and the service needs of tenants must be met throughout the project’s operational life.
 - This long-term commitment can also affect the nature of an organization, diverting time, energy and financial resources away from other service delivery or social change issues that may have inspired the organization’s original founders.

Another fundamental question an organization must ask itself is: *“Would we be more effective by pursuing other strategies, such as assisting homeless people to rent existing housing, advocating for housing policy changes, or fighting discrimination in rental housing in our community?”* In answering this question, an organization may determine that strictly limiting the organization’s work to providing services and/or advocacy may **not** be the most effective way to pursue the organization’s larger mission of social change - developing, owning and operating supportive housing projects directly expands the supportive housing resources within the community and creates important improvements to the physical environment.

Further, such development activities establish an organization as an important stakeholder with a tangible investment in the community, with greater potential influence, and better able to present



the case for affordable and supportive housing with greater credibility in the eyes of many decision-makers. Finally, success in developing and operating real estate can greatly enhance an organization's credibility with philanthropy, government agencies, and other potential funding sources.

Tools for Assessing Capacity:

Ultimately what's most important is that each organization makes a deliberate decision on how to move ahead based upon their unique capabilities, resources, and circumstances. The following tools focus on what's involved in creating new supportive housing units, key issues for assessing organizational capacity to take on such work, and how to determine what the best development role is for an organization or to pursue an alternative to development.

- **Roles in Supportive Housing Development and Operations:** This document contains detailed information about the different roles an organization can play in the development and operation of a supportive housing project – the owner, the developer, the property manager, and the service provider. This tool also contains a table that describes the long-term and the short-term focus of each role, as well as questions to help analyze an organization's capacity to perform each role.
- **Assessing Readiness for Supportive Housing Development Activities:** This document examines the implications of developing and/or operating a supportive housing development project from the different perspectives of a housing development organization or a social service provider.
- **Assessing Fit: Does Developing Supportive Housing Fit With Your Strategic Plan, Mission and Organizational Structure?:** This document provides questions that help guide an assessment of whether a proposed project fits with an organization's strategic plan, mission and structure.
- **Applying for Financing for Predevelopment Activities:** This document describes the need for upfront dollars – or predevelopment financing - to fund activities related to the development of supportive housing. No matter what role an organization decides to assume, it will need money to advance the project. This document includes a table that identifies the kinds of information that potential predevelopment funders typically request in order to decide whether or not they will provide such financing.
- **Alternatives to Housing Development Activities:** This document provides information on strategies to provide quality supportive housing that do not involve a large scale construction project or, with a leasing strategy, a commitment to owning real estate. This document can help to determine the appropriateness – both for the organization and the clients to be served – of each alternative strategy.

B. Building the Development Team

The Team Advantage

All housing development is complex, and supportive housing development is even more complex, requiring the specialized expertise from a variety of different disciplines and professions. Few organizations have all of the necessary skills and experience in-house. Most organizations that will be leading the development of a new supportive housing project will need to assemble a development team, a group of professional consultants, service vendors and other nonprofit



organizations that collectively bring all of the skills, expertise, knowledge and experience to bear on the development and operation of the project.

Developing supportive housing presents significant challenges for any organization, including:

- Development requires a considerable up-front financial investment;
- Development activities can expose the sponsor to considerable financial risk;
- Development activities requires much more time and attention on the part of your organization and its governing board; and
- Development requires very specialized expertise in real estate transactions and affordable housing finance.

Options for meeting these and other development challenges include:

- The organization may handle all project related tasks and the overall management of the project in-house; or
- The organization may hire a development consultant to manage the project based upon instructions provided, and decisions made, by the organization along the way; or
- The organization may partner with a developer (either non-profit or for-profit) who will handle the majority of the development activities, with your input provided throughout the process (also know as a joint venture or co-sponsorship) and remains in the project as a co-owner; or
- The organization may contract with a developer (either for-profit or non-profit) to develop the project, essentially on their own, and then turn it over to your organization once it's completed (also known as a "turn-key" development).

Tools to Assist with Building the Development Team:

The following tools are designed to assist organizations to understand the various skills and roles that must be represented on the development team, as well as considerations for selecting members of the development team:

- **Roles and Responsibilities of Development Team Members**: This document provides an overview of the critical roles and responsibilities that must be included within any supportive housing development team, including the Project Manager, the Developer, the Property Manager, the Service Provider, and other team members.

The following tools all address key consideration for selecting members of the development team, whether those team members are partner organizations or professional consultants:

- **Selecting a Development Partner**
- **Issues to Consider When Hiring Consultants**

- **Selecting a Development Consultant**
- **Sample Consulting Agreement for Development Services**
- **Selecting a Property Manager**



- [Selecting an Asset Manager](#)
- [Selecting an Architect](#)
- [Selecting a General Contractor](#)

C. Assembling the Financing

This section of the *Toolkit* provides a primer on identifying, analyzing, and paying for the costs to develop a supportive housing project and to operate it over time. The various tools, documents, and informational materials in this section of this toolkit focus on the component parts of a financial proforma for a supportive housing project and how to prepare one; critical real estate finance concepts; and strategies for financing the development and operation of supportive housing.

Tools to Assist with the Assembling the Financing:

- [Preparing the Supportive Housing Project Proforma](#): This document provides an overview of the components of a supportive housing project's budgets and how they are organized into the project pro forma, including the Rent Roll, Operating Budget, and Development Budget. The document also addresses how to calculate rent levels, and projecting rental income.
- [Overcoming Challenges to Financing Supportive Housing](#): This document describes some of the significant challenges to financing supportive housing, including gaps in operating budgets and other financial complexities, and introduces strategies for addressing those challenges.
- [Financing Supportive Housing Guide](#): This interactive, web-based guide provides an in-depth presentation of many sources of funding available to pay for the costs associated with developing, operating and providing services in supportive housing, including Federal sources and information for the following states: California, Connecticut, Illinois, Michigan, Minnesota, New Jersey, New York, Ohio, and Rhode Island.
- [How to Prepare a Supportive Housing Operating Budget](#): This document is a detailed description of the costs that need to be included within a supportive housing operating budget, and provides guidance for projecting many of those costs, including special considerations for tax credit financed projects.
- [How to Prepare a Supportive Housing Project Development Budget](#): This document is a detailed description of the costs that need to be included within a supportive housing development budget, and provides guidance for projecting many of those costs, including special considerations for tax credit financed projects.
- [How Debt Financing Works](#): This tool describes how the operating analysis is connected to a project's ability to borrow funds for development costs and defines the significance of debt service coverage requirements for financing plans.
- [Debt vs. Equity](#): This document provides quick definitions to help differentiate the forms of financing that may be involved in a supportive housing project budget – debt, equity and grants.
- [Types of Financing for Supportive Housing Development and Operations](#): The tables in this document illustrate and define the various types of financing available for



predevelopment activities, development activities, and operation of a supportive housing project.

- **Understanding Low-Income Housing Tax Credits**: This document is an introduction to the Low-Income Housing Tax Credit (LIHTC) program and key considerations for securing equity investments and evaluating syndication options.
- **Capitalized Rental Subsidy Reserves**: This document describes the financing strategy of creating a reserve to cover costs when rental income isn't sufficient to cover a project's maintenance and operating costs over time. This tool also includes a sample of an agreement that would be used by a funder to stipulate how such a reserve fund would be administered and disbursed, as well as simple model for determining how to size a reserve.
- **How to Structure and Evaluate Market Studies**: This document provides an in-depth discussion of what a market study is and the importance of market issues to supportive housing financing and development planning.
- **Considerations for Developing and Managing the Supportive Services Budget (and Sample Budget)**: This informational piece provides useful insight into the considerations that inform the supportive services budget as well as accounting for supportive services funding once the project is implemented. This document also includes a sample budget that breaks out expenses by types of costs as well as funding sources.
- **Types of Sources of Supportive Services Funding**: This informational piece describes the main ways in which public resources are available for supportive services within housing (both to local communities and individual projects), with an explanation of the difference between formula grants and competitively awarded funds.

D. Selecting and Securing the Project Site

Without a site, a supportive housing project can never advance beyond the concept phase into a feasible development proposal – but finding, acquiring, and getting approvals for an appropriate site can be among the biggest hurdles for supportive housing developers. This section of the *Toolkit* includes tools designed to help organizations develop criteria for an appropriate site, secure control of a site, perform thorough due-diligence to ensure the site is feasible, and develop community support for the planned development at the site.

Tools for Selecting and Securing the Project Site:

- **Site Selection Criteria and Site Search Strategies**: This document includes critical information on establishing site selection criteria, considerations that need to be addressed within that criteria, and strategies for finding a site that fits the criteria.
- **Establishing Site Control**: This document describes the various forms “site control” (some form of right to acquire or lease a site) with which supportive housing developers need to familiar, as well as guidance for negotiating a purchase agreement.
- **Physical Feasibility Checklist**: This worksheet identifies key factors in selecting a site (such as location, land use and zoning regulations and community relations) and lists the questions that need to be answered when considering each factor for specific sites that are being considered for development.



- [Sample Contract of Sale \(New York\)](#)
- [Sample Purchase Agreement \(California\)](#) These two sample agreements are provided as examples of what might be included in a Purchase Contract, but contract language can vary greatly depending upon the location, the seller, and the lenders and attorneys involved.
- [Site Analysis for Supportive Housing Development](#): This document provides guidance regarding the key components of the site analysis to be performed during the due diligence period, including community acceptance processes, the appraisal, the zoning analysis, environmental analyses and other inspections, the relocation study (if applicable, and financial feasibility analyses.
- [Guide to Appraisal Reports](#): This document provides a detailed description of how an appraisal is conducted, how to engage an appraiser's services, and how to review and evaluate the results of an appraisal.
- [Thinking Beyond NIMBY: Building Community Support for Supportive Housing](#): This is a chapter from CSH's *Family Matters* publication on developing and operating family supportive housing and provides an analysis of the issues involved in addressing community concerns regarding the development of a supportive housing project.

This tool is a step-by-step guide to systematically creating appropriate strategies for gaining community support for a supportive housing project.

- [Six Steps to Building Community Support](#):

E. Deal Structuring and Beyond

Once organizations have put together the essential resources for developing a supportive housing project, there are still critical challenges related to structuring the financing, designing the project, and navigating risks. This section includes tools to help organizations move successfully through these challenges.

Tools for Deal Structuring and Beyond:

- [Deal Structuring for Supportive Housing](#): This document provides an overview of critical aspects of structuring a supportive housing deal, including designing the project, obtaining approvals, and applying for, layering and closing project financing.
- [Deal Structuring Worksheet](#): This tool provides a list of program parameters that should be considered regarding each of the project's financing sources in order to ensure the funding sources can work together compatibly and are a good fit for the planned project.
- [Addressing Restrictions in Public Financing Programs](#): This document explores issues related to restriction in public financing sources, and how to determine if, and how, those restrictions might be changed.
- [Sample Loan Closing Checklist](#): This table summarizes the items that may be required when borrowers close a loan with the Corporation for Supportive Housing, and is provided here as an example of such closing requirements. Other funding sources may have



additional requirements, may not require each of these documents, and the specific requirements may vary depending upon the nature of the loan.

- **Suggestions for Physical Design Standards in Supportive Housing**: This document provides suggested design standards for supportive housing projects, especially single site, multi-unit buildings. It is not a checklist of required items -each supportive housing project is unique and design decisions should be made by architects, owners, and service providers cooperatively, keeping in mind cost constraints.
- **Navigating the Construction Period**: This document identified Key strategies for successful risk mitigation include during the construction of a supportive housing project.
- **Risks in Affordable Housing Development: Important Factors to Watch (from Enterprise)**: This memo, prepared by Enterprise, explores risk issues for each major phase of nonprofit housing development, and links to more detailed information from Enterprise regarding risk mitigation strategies.



III. Housing Operations

This section provides a variety of tools related to the provision of property management services in supportive housing settings, including the importance of mission-driven property management, tenant screening and selection procedures, lease and lease enforcement issues, reasonable accommodations for tenants with disabilities, safety and security protocols, and maintenance issues.

A. Introduction to Property Management in Supportive Housing

Many organizations that develop a new supportive housing project are inexperienced in the performance of property management responsibilities. Social services agencies often make the decision to develop supportive housing based upon their thorough understanding of the needs of their target populations. While such agencies will bring strengths to their provision of supportive services to their residents, assuming responsibility for property management often represents a very difficult cultural shift. Property management in a supportive housing setting can present new challenges even for experienced housing development organizations.

Property management in for-profit housing is a “bottom-line” proposition - management provides basic services to tenants as specified in the lease while keeping expenses contained so that the property still generates a profit for the owner. Property management within the context of supportive housing is more complex and can be thought of as being responsible for a “double bottom-line” - maintaining safe, clean, cost-effective properties while also partnering with supportive services staff to help ensure that at-risk and formerly homeless tenants are able to remain living in the housing successfully.

The procedures in this section reflect best practices developed by supportive housing owners, so that supportive housing property management staff can provide high quality, consistent and respectful management services. These practices also help staff protect the safety of tenants and staff, and monitor compliance with the leasing agreement and house rules. The following tools provide a basic grounding in what it means to provide property management services in supportive housing projects and offer guidance on formulating a property management plan.

Tools for Introduction to Property Management in Supportive Housing:

- **Roles of the Property Manager and Asset Manager**: This informational piece will help providers understand the unique role of property management and also what is meant by asset management.
- **Key Principles for Coordinating Property Management and Supportive Services in Supportive Housing**: This informational piece describes the different ways providers can address the property management role (such as through partnerships), and stresses the importance of formalizing roles and responsibilities. It introduces the concept of “mission-driven property management,” underscoring how property management in supportive housing can support residents’ success.
- **Property Management and Supportive Services: Roles and Responsibilities and Areas of Overlap**: This table identified areas of responsibilities of supportive services and property management staff that overlap and how they can be coordinated. This tool can



serve to structure conversations among staff regarding how these responsibilities will be delineated within their project.

- **Forms of Property Management in Supportive Housing**: This informational piece provides further detail regarding the various ways a project can provide property management (in house models versus partnerships), identifying advantages and disadvantages of each approach
- **Supportive Housing Policy and Procedures Manuals**: This document describes the importance of maintain a policies and procedures manual for supportive housing operations, and identifies the issues to cover within the manual to provide guidance to staff.
- **Management Plan Outline**: This outline, prepared by the Connecticut Housing Finance Authority, provides an example of the standard contents of a Management Plan, frequently required in tax credit projects and projects receiving government funding in order to demonstrate to investors, lenders, and grantors that the responsible entity has planned for the effective management of the project.

B. Tenant Screening, Selection and Move-In

The process of outreaching to, screening, and selecting tenants for a supportive housing project is a two-way process during which project staff is evaluating whether a specific prospective tenant is right for the project, and the prospective tenant is deciding if she or he would like to live there. The move-in process, if conducted in a thorough manner, can set the stage for successful tenancy.

This section of the *Toolkit* will help housing providers plan and document their official tenant screening, selection and move-in procedures. The tools, sample forms and informational pieces in this section will be of use to providers as they outreach to prospective tenants (or receive referrals of prospective tenants), interview and assemble files on prospective tenants, and get ready to move selected tenants into the project.

Tools for Tenant Screening, Selection and Move-In:

- **Sample Marketing Plan**: This document is a sample template of a complete and approved marketing plan intended to comply with HUD and other funder requirements.
- **Identifying Prospective Supportive Housing Tenants**: This table compares the different methods commonly used to identify prospective residents, the advantages and disadvantages of each, and how to work most effectively within each method.
- **Sample Application for Supportive Housing**: This document provides a model for an application for supportive housing projects.
- **Sample Contents of an Applicant File**: This document provides a template for sample applicant file contents during the screening process.
- **Sample Consent to Release or Obtain Information**: This document is a sample of the kind of form that needs to be used if the process of verifying eligibility involves securing documentation from third parties.



- **Sample Applicant Tracking Form**: This document is a sample for to help staff track applicant through stages of screening so that the process proceeds efficiently and all applicants are treated uniformly.
- **Tenant Selection and Intake Considerations**: This informational piece identifies the policies, forms, procedures, and program elements that should be in place prior to beginning the tenant screening process.
- **Legal Considerations During Screening and Intake**: This document addresses important legal considerations involved in the tenant screening process pertaining to Fair Housing, including what information may be obtained from the applicant, and important considerations regarding specialized housing models and target populations.
- **Sample Applicant Screening Protocol**: This document provides a sample protocol for screening applicants for supportive housing, focusing on the applicants' ability to live in a diverse environment and pay rent on time.
- **The Applicant Interview**: This list contains the types of issues typically covered in a prospective tenant interview, stressing the importance of tying all requests for information back to the candidate's ability to uphold the terms of tenancy.
- **Rejection Criteria for Supportive Housing**: This piece provides a list of sample reasons why a provider may choose to exclude certain applicants, stressing that one important goal of supportive housing is to "screen in" prospective tenants that would be precluded from other housing opportunities because of past poor rental histories and other background issues.
- **Sample Applicant Appeal Procedure**: This is a sample guideline for applicant denial appeal procedures.
- **Sample Housing Skills and Supports Checklist**: This is an example of a form that may be completed after an applicant has been accepted into housing, to help identify their service needs, focused on the skills necessary, in varying degrees depending upon the housing model, for living successfully in the community.
- **Move-In: Keys to Success**: This piece reviews the types of logistical support new tenants may require during the move in process, what to cover in a pre-occupancy meeting, and unit walk-through.
- **Sample Initial Move-In Tenant Questionnaire**: To be used by property management staff to take inventory of the furnishings and appliances present in the unit at move-in, and includes a checklist of training needed/provided to the tenant on proper operations of appliances.
- **Orienting Tenants to their New Home**: This piece provides a checklist of topics to cover during orientation, from reviewing the lease agreement to introducing the new tenant to staff.
- **Apartment Condition Checklist**: A checklist that can be used by property management to establish the condition of the apartment and its contents at move-in and at move-out so that tenant is accountable for any damage beyond normal wear and tear.



C. Leases, Lease Enforcement, and Rent Collection

The lease is a legal document that formalizes the rights and responsibilities of both tenant and landlord. The execution of a lease between the housing provider and the tenant means that the tenant has a legal right to occupancy of the unit, and that the relationship between the housing provider and the tenant is governed by landlord-tenant law. The lease is what differentiates permanent housing from other types of residential programs, where program operators and clients do not have recourse to the legal system when resolving disputes.

Just as the lease and its attachments (or *addenda*) communicate clear expectations for tenants regarding the terms of their occupancy and prescribe consequences when the terms are not observed, the lease also protects the tenant from arbitrary, unfair or illegal actions by the landlord. It is therefore exceptionally important that any attempts to enforce the lease be carefully documented.

Eviction of tenants in supportive housing is an extremely serious matter. Providers of supportive housing are funded to provide housing for formerly homeless persons who, by virtue of their difficulty securing or maintaining housing in the past, may require *extra support* to become successful tenants. It is the duty of the provider to exhaust all appropriate interventions before resorting to eviction. Such interventions are often pursued collaboratively by property management and supportive services staff. If and when eviction must occur, the eviction process must follow specific, legally mandated steps, some of which are described in documents in this *Toolkit* below. This *Toolkit* cannot speak to the specifics of local Landlord-Tenant laws regarding eviction procedures – housing operators are strongly urged to consult with a landlord-tenant attorney at all stages of the eviction process.

Note: This section of the Toolkit contains many template documents that can be adapted and used in the context of different types of permanent housing projects. However, readers are strongly urged to have all legal documents reviewed by an attorney to ensure compliance with all applicable laws.

Tools for Leases, Lease Enforcement, and Rent Collection:

- **Sample Lease Agreement:** This example of a lease, from a youth supportive housing project, addresses all typical lease provisions.
- **House Rules in Supportive Housing:** This document reviews some key considerations to keep in mind when developing house rules, set expectations for behavior in the housing community and should be referenced in, and appended to, the lease.
- **Sample House Rules for Supportive Housing:** This document, while not exhaustive, provides several sample house rules. Providers may choose to use this document to start and then consider what additional topics to address, depending on the specifics of the housing project.
- **Substance Use/Abuse and the Lease:** This document, taken from CSH's publication *Between the Lines: A Question and Answer Guide on Legal Issues in Supportive Housing – National Edition* (prepared by the Law Offices of Goldfarb and Lipman), discusses the



legal implications of substance abuse and the use of illegal drugs within a supportive housing development.

- **Sample Policy on Drug and Alcohol Use**: While all leases prohibit the use and distribution of illegal drugs on site, many supportive housing providers include an addendum of this type as part of their approach to working with people with substance use issues. The policy emphasizes standards of acceptable community behavior rather than the use or non-use of drugs and alcohol. This allows the tenant to speak openly about drug abuse and its concomitant issues to supportive services staff without fear of eviction.
- **Tenants' Animals and Sample Documents**: This document will help providers design a policy regarding animals within the housing project, and includes a sample Pet Agreement Addendum to Rental Agreement and a sample Companion / Service Animal Procedure.
- **Tenant File Maintenance and Record Keeping**: This document will help providers design a tenant file system that will lead to easy review by funders, auditors, and attorneys (in the event documents are subpoenaed or needed for evidence), and includes a sample file organization that can serve as a checklist of documents to include in a tenant file.
- **Policies Regarding Rent Receivables**: This informational piece provides basic advice regarding the collection of rent within supportive housing, including when/by whom rent payments are accepted, past due notices, and guidance regarding rent calculation in HUD projects.
- **Guidelines for Rent Collection in Supportive Housing**: This document provides consideration to help Supportive housing operators develop a clear rent collection policy, a critical function of property management.
- **Sample Notices Regarding Failure to Pay Rent**: This document contains sample notices for use when tenants fail to pay rent, including a Sample Notice of Failure to Pay Rent, Sample Final Notice of Failure to Pay Rent Prior to Legal Action, and a Sample 3-Day Notice to Pay Rent or Quit.
- **Sample Proof of Service**: This document is a sample format for documenting that legal notices, including notices regarding failure to pay rent, have been served to the tenant.
- **Sample Rent Payment Pledge**: This document provides a sample format for documenting a rent payment plans, to offer tenants an opportunity to avoid legal action by consenting to pay a portion of back rent each month until fully repaid. Payment plans are sometimes offered in conjunction with money management to stave off eviction for tenants with histories of non-payment.
- **Proper Handling of Tenants' Abandoned Belongings**: This document described the protocol for when a housing operator believes that a tenant has abandoned their unit and would like to re-let the unit to a new tenant, and includes a Sample Notice of Belief of Abandonment:
- **Sample Lease Violation Policy and Notice**: This document describes the importance of policies that require documentation of all lease violations to ensure that all tenants are being treated equally and includes a Sample Notice of Lease Violation to alert a tenant to the violation and provides an opportunity for him/her to clarify any misunderstandings about the lease.
- **Sample Housing Retention Conference Guidelines and Policy**: Before considering evicting a tenant, providers need to check whether they have exhausted all reasonable interventions that serve to keep clients housed. This document provides a sample Guideline and Policy for prioritizing housing retention approaches.



- **The Eviction Process in Supportive Housing:** For those situations in which eviction cannot be avoided, this document provides sample protocols for how staff should proceed with evictions step-by-step, including important “checks and balances” to ensure appropriate preventive measures have been attempted and appropriate approvals by management have been secured. Once again, providers are cautioned that eviction is a difficult, often expensive and protracted process, and should be regarded as a last resort.

D. Reasonable Accommodations in Supportive Housing

Broadly defined, reasonable accommodations are modifications or measures taken to make a program or facility serving the public accessible and usable by persons with disabilities. The legal obligation to provide reasonable accommodations is rooted in the Americans with Disabilities Act (ADA) and other Federal and State disability civil rights and accessibility laws. Under the ADA, public entities are required to “make reasonable modifications in policies, practices, or procedures when the modifications are necessary to avoid discrimination on the basis of disability.”

Furthermore, Section 504 of the Rehabilitation Act of 1973 provides that no otherwise qualified individual with a disability shall, solely by reason of his or her disability, be excluded from the participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving Federal financial assistance. Virtually all programs and facilities that receive any type of government funding are covered by these requirements. Such programs and facilities are required to make reasonable accommodations under the ADA unless they can demonstrate “that making the modifications would fundamentally alter the nature of the program, service, or activity.” (28 CFR Part 35 § 35.130(7))

Persons with disabilities are legally entitled to reasonable accommodations in order to have the full use and enjoyment of the housing opportunities being made available by the supportive housing provider. It is extremely important for owners and operators of supportive housing to have clear, organized and well-documented policies and procedures for receiving, considering and responding to such requests for accommodation, and for these policies and procedures to be clearly communicated to housing applicants and tenants. It should also be noted that some applicants or tenants may need accommodations to be made in the administration of these policies and procedures as well, such as assistance with completing forms or gathering necessary documentation.

Reasonable accommodations take many forms in supportive housing, as in the following examples:

- **Physical:** Alterations to units or common areas (for example, the installation of grab bars in a bathroom or front-loading washing machines in the laundry room).
- **How Information Is Shared:** Programs may make their written materials and other information available in Braille, large print, or on audio-tape for residents with visual impairments, or through a sign language interpreter for the hearing impaired.
- **Policies/Rules:** Exceptions to or waivers of certain policies or rules (for example, allowing service animals in a building that does not otherwise allow pets).



The supportive housing provider must institute a policy and procedure for accepting, considering, and responding to requests for reasonable accommodation. It is crucial that the provider be able to respond flexibly to the needs of individual applicants and residents, a task that is more often difficult in the case of “hidden” disabilities (not visibly apparent).

This section of the *Toolkit* will help providers comply with their legal obligations by instituting reasonable accommodation policies and procedures that, at a minimum:

- Notify applicants and residents of their rights to reasonable accommodation;
- Provide applicants and residents with disabilities an opportunity to request and verify the need for reasonable accommodations; and
- Formally respond to requests by either granting the reasonable accommodation OR stating a reason for the denial and providing access to a grievance process.

All such policies, procedures and forms should be reviewed by legal counsel.

Tools for Reasonable Accommodations in Supportive Housing Operations:

- **Reasonable Accommodations in Tenant Selection Processes:** This informational piece, written in the form of questions and answers, summarizes legal Reasonable Accommodations issues of which providers should be aware as they screen prospective tenants in order to avoid discrimination against prospective tenants with disabilities.
- **Reasonable Accommodations During Occupancy:** Similar to the section above, this informational piece describes legal Reasonable Accommodation issues during occupancy, and highlights that the need for a reasonable accommodation can occur anytime during a tenant’s occupancy.
- **Sample Notice of Right to Reasonable Accommodations:** An example of a form communicating to tenants regarding their right to request a reasonable accommodation, if needed.
- **Sample Request for Reasonable Accommodation Form:** An example of a form that tenants could be asked to use to request their reasonable accommodation.
- **Sample Verification of Need for a Reasonable Accommodation Form:** An example of a letter and form that could be used to request third-party verification of the need for the requested accommodation.
- **Sample Physician’s Verification of Need for Home Health Care Services Form:** An example of a form that could be used third-party verification of tenant’s need for a home health care provider, which may require accommodations to the lease and/or the tenant’s unit size.
- **Sample Home Health Care Provider Authorization Form:** An example of a form that could be used to confirm requirements and expectations placed on home health care provider.
- **Sample Unit Transfer Request Form:** An example of a form that tenants could be asked to use to request a transfer to a different unit as a reasonable accommodation.
- **Sample Response to Request for Reasonable Accommodation Form:** An example of a form that could be used for responding to requests for reasonable accommodations.



E. Safety and Security

One challenging aspect of operating supportive housing is putting in place effective safety and security procedures without residents feeling unduly restricted in their home environment. Supportive housing is by definition independent living. Residents value the freedoms this implies, and will often express objection to rules and procedures that make the housing site feel “like a program.” However, such security practices can also ensure that the housing environment remains safe and orderly and offers a sense of community, qualities that residents also value. In short, safety and security policies and protocols help both residents and staff to prevent and respond effectively to incidents that threaten to undermine stability. It is important that these policies and procedures be clearly outlined for tenants (including both their purpose and their execution), and applied consistently by staff.

Safety procedures, crisis intervention, violence prevention, de-escalation and emergency/disaster planning are crucial elements of on-going training for staff at all levels. It is strongly recommended that providers make these topics part of staff orientation, provide periodic in-service and refresher training sessions on them, and take advantage of training opportunities in these areas available through local mental health associations, law enforcement agencies and emergency response agencies and teams. It is also recommended that providers develop relationships with their local police precinct and offer specialized training for staff in when and how to involve law enforcement agencies and emergency psychiatric services.

This section of the *Toolkit* is designed to help providers establish sound and pro-active safety practices, focusing on those most frequently implemented in supportive housing environments. These recommendations are intended to augment, not replace, design features such as security cameras, intercoms, and other measures that protect the perimeter and restrict access to the physical premises by unauthorized persons.

Tools for Safety and Security:

- **Critical Situations During Building Operations Scenarios**: This document contains a list of scenarios that, while hypothetical, are also not atypical for supportive housing projects. These scenarios can be very useful in training situations where both property management and supportive services staff are present, to discuss how staff would respond to each situation described.
- **Safety and Security Responsibilities**: This document provides an overview of safety and security responsibilities, and for responding to crises.
- **Preventing Crisis and Conflict**: This informational piece highlights the importance of good record-keeping and communication between staff in preventing crises. It also instructs providers on how to identify potential sources of conflict and offer early intervention.
- **Log Books and Incident Reports**: This informational piece describes two common ways of documenting and tracking incidents. It first details the practice of keeping a log book in order to record incidents, including what types of incidents should be noted and the purposes for which this information may be used. It then describes the practice of incident



- reporting, including responsibility for follow-up and coordination between supportive services and property management in responding to incident reports.
- **Sample Policy and Procedure for Incident Reviews**: This sample policy describes one program's approach to reporting, investigating and responding to significant incidents that occur on site. It also describes the formation of an incident review committee that is charged with periodically reviewing incident reports and making policy recommendations to prevent future incidents.
 - **Supportive Housing Visitor Policies**: This informational piece provides guidance regarding the formulation and enforcement of visitor policies.
 - **Mediating Conflicts in Supportive Housing**: This informational piece provides useful guidance for staff in personally mediating conflict situations.
 - **Sample Incident Report / Tenant Complaint Form**: This template requests the basic information needed to document and respond to incidents (who, what, when, how).
 - **Coordinated Responses to Inappropriate Behavior by a Tenant**: This table provides a model for coordinated and collaborative response to crises by staff (property management and supportive services), explaining which staff should be responsible for which steps.
 - **Emergency Procedures for Supportive Housing Sites**: This informational piece highlights the importance of having written crisis policies and procedures in place for use by staff and suggest the topics they should cover.
 - **Protocols for Emergencies**: This document includes suggested protocols for handling medical emergencies, psychiatric emergencies, and incidents resulting from alcohol and/or substance use.
 - **Protocols for Potentially Violent Situations**: This document describes the need for policies and procedures and training for staff in how to respond to violence and potentially violent situations, including identifying outside agencies that can be called upon to intervene., includes a sample policy procedure and a tool to provide staff with a quick guide to bringing in law enforcement in response to violent incidents.
 - **Universal Precaution Guidelines**: This document provides an overview of precautions to minimize the transmission of illnesses such as HIV and hepatitis B and C. The guidelines are designed to prevent people from having direct contact with blood and other fluids, including semen, vaginal fluid, breast milk, and amniotic fluid.

F. Maintaining the Physical Plant

When a building and its systems are functioning optimally, it may *seem* effortless – the lobby and hallways are freshly painted, the floors shine, the temperature is comfortable, and any problems that arise are addressed promptly. However, behind the scenes in such buildings is a highly deliberate system of janitorial and maintenance procedures, schedules, inspections, and periodic updates and replacements as well as an adequate budget to support appropriate staffing, materials and supplies.

The absence of such minute attention to maintenance quickly becomes apparent, and also becomes a source of major dissatisfaction on the part of residents. *Deferred maintenance* – postponement of upgrades or repairs to building equipment or systems – results in their premature deterioration, causing major inconvenience to tenants and necessitating expensive stop-gap emergency repairs. Failure to implement a regular system of cleaning and pest control can result in



citation by the Department of Health. Tenants may also file for rent reductions if a service or amenity specified in their lease (or required by law) is not provided.

This section of the *Toolkit* is intended to assist housing providers as they consider the maintenance and janitorial part of their property management plans. By no means exhaustive, this set of tools provides a sampling of the types of maintenance procedures providers will want to address, accompanied in some cases by sample forms.

Tools for Maintaining the Physical Plant:

- **Key Training Issues for Maintenance and Janitorial Staff**: This informational piece discusses the ways in which maintenance and janitorial work in supportive housing is different, and the training that may need to be provided.
- **Tips for Creating a Safe Living Environment**: Both staff and tenants play important roles in creating a safe living environment within supportive housing projects. This document contains tips for both staff and tenants to consider.
- **Universal Precaution Guidelines**: This document provides an overview of precautions to minimize the transmission of illnesses such as HIV and hepatitis B and C. The guidelines are designed to prevent people from having direct contact with blood and other fluids, including semen, vaginal fluid, breast milk, and amniotic fluid.
- **Housing Quality Standards Checklist**: This inspection checklist is based on the Housing Quality Standards prescribed by HUD to ensure habitability in all HUD-funded projects.
- **Key Control and Entering Tenants' Units**: This document provides guidance regarding the safe-keeping of building keys and regulations regarding entry into tenants' units.
- **Routine and Non-Routine Maintenance and Sample Notices**: This document provides suggestions for protocols related to the handling of maintenance complaints by tenants and distinguishing routine repair issues from emergencies. This document also contains sample forms for when tenants will be charged for maintenance repairs and for notifying a tenant that unsanitary conditions have been noted in his or her unit.
- **Pest Control and Bedbug Eradication**: This document contains suggestions for establishing a pest control rounds protocol that gives appropriate notice to tenants and respects their rights to privacy, and includes sample policy, protocol, and notice to tenants regarding bed bug eradication efforts.
- **Unit Turnover Protocol**: This informational piece provides suggestions for protocols related to tenant move out and preparation for the next tenant, including unit inspection and a sample Move-Out Data Sheet for documenting the condition of a vacated unit upon move-out.
- **Damage Beyond Normal Wear and Tear at Move-Out**: This informational piece helps staff distinguish between intentional damage and the gradual wear caused by normal tenant use, and how to establish standards for both, in order to avoid disputes.



IV. Supportive Services

The close integration of supportive services activities with the operating of affordable housing is what defines supportive housing. The documents in this section focus on the provision of effective services in supportive housing settings, including designing the services plan, effective service delivery and community-building strategies, and preparing for the needs of tenants of supportive housing.

A. Designing the Supportive Services Plan

By definition, supportive housing features supportive services designed to help residents be successful in housing. Beyond that, however, there is a great deal of variation in the how, what, where, why and how of services provision from project to project. Factors that drive decisions about service planning include target population, the size of the project, housing model, proximity to other services utilized by tenants, organizational infrastructure and capacity, funder requirements, and budget. Other important factors that inform the design of supportive services concern organizational mission and the provider's primary motivation for providing housing to formerly homeless persons.

A key goal of the supportive services planning process is to determine what services will be provided and by what entity. Ideally, the housing provider will be able to offer, either directly or through partnerships, dedicated staff to serve the residents of the housing while leveraging community resources where appropriate and available. Some providers are prepared to offer services by expanding on their own services infrastructure, while others will reach out to partner agencies in the community equipped to provide services to residents on a contracted basis, either on or off-site.

The goal of this section of the *Toolkit* is to provide an overview of the planning process culminating in a comprehensive supportive services plan. It will provide a basic understanding of supportive services provision in the context of supportive housing, and address key points of decision for providers such as types of services to be provided and staffing patterns. It will also address how to work with a consultant in the supportive services planning process.

It is intended that providers undertake the self-assessment and supportive services planning process far in advance of occupancy, and preferably prior to construction (if applicable), so that design decisions are made with supportive services in mind. Guidance regarding the timeline for services planning is also part of this section.

Tools for Designing the Supportive Services Plan:

- **Supportive Services Planning Tools:** This two-part tool contains a comprehensive outline of critical issues to be addressed in service planning and a step-by-step timeline with key service planning milestones leading to occupancy.
- **Supportive Services Planning Worksheet:** This checklist enumerates the many types of services that may be needed by residents of supportive housing and prompts the provider



- to specify how the services will be provided (i.e. by what entity and on-site in housing or off-site in the community).
- **Standards for Services Programs in Supportive Housing**: This tool can serve as a checklist of items for assessing the quality and comprehensiveness of the provider's supportive services plan.
 - **Planning for Services for Different Populations and Levels of Need**: This tool provides an overview of target populations and how service needs will likely vary according to the mix of residents.
 - **Service Planning in Affordable Housing vs. Supportive Housing**: This side-by-side comparison examines versus the differences in approach when providing services in an affordable housing development supportive housing setting.
 - **Sample Services Staff Roles in Supportive Housing**: This informational piece describes several common supportive services staff roles, including how each assists residents.
 - **Sample Services Plan for a Supportive Housing Development**: This sample plan addresses all the common elements of supportive services plans. In this particular example, several providers work with different target populations living in the project. A budget template provides a sample staffing pattern and common non-personnel line items.
 - **Considerations for Developing and Managing the Supportive Services Budget (and Sample Budget)**: This informational piece provides useful insight into the considerations that inform the supportive services budget as well as accounting for supportive services funding once the project is implemented. This document also includes a sample budget that breaks out expenses by types of costs as well as funding sources.
 - **Types of Sources of Supportive Services Funding**: This informational piece describes the main ways in which public resources are available for supportive services within housing (both to local communities and individual projects), with an explanation of the difference between formula grants and competitively awarded funds.
 - **Sample Consulting Agreement for Supportive Services Planning**: This sample agreement provides examples of the types of assistance that can be provided by a consultant during the services planning process.
 - **Sample MOU Between Non-Profit Housing Developer, Social Service Agency and Property Management Agency**: This three-party agreement provides a detailed description of the roles and responsibilities of each agency.
 - **Glossary of Terms Related to the Provision of Supportive Services**: This glossary includes a range of "terms of art" used frequently in supportive housing settings, covering a range of areas from health conditions and drug treatment terminology to income support and housing model types.

B. Essential Service Strategies for Supportive Housing Settings

There are several factors that make the provision of services in the context of supportive housing unique. First, the services are provided in, or in connection with, the tenants' housing, with the primary goal of the services to promote housing stability. Second, because the services are provided in a residential community, the services must also be oriented around creating a sense of community that is welcoming and comfortable for all.



In addition, unlike other settings in which services are compulsory for program participants, services in supportive housing are often voluntary, with an expectation that a tenant cannot be evicted for failure to participate in services if they otherwise honor the terms of their lease. Because services are voluntary, staff must work that much harder to engage residents and provide services and activities that are viewed as helpful and appealing - the trust built between staff and residents must serve as a primary motivation for participation in services leading to success in housing.

This section will take providers through a range of practical issues in the day-to-day work of providing services in supportive housing, including engagement (the start of relationship and trust building between residents and staff), one-on-one case management, and community building.

Tools for Essential Service Strategies for Supportive Housing Settings:

- **Effective Engagement in Supportive Housing**: This document offers general guidance regarding engagement, including effective modes of behavior and communication during engagement, and including special considerations for engagement with persons with mental illnesses and persons with substance use issues.
- **Effective Communication Techniques**: This instructional tool describes how to ask open ended questions and engage in reflective listening while attempting to engage a resident in order to test assumptions, affirm the resident in their feelings and wishes, and have more participatory interactions during engagement.
- **Case Studies: Finding Common Ground and Engagement Strategies**: This tool provides illustrative case studies that demonstrate effective engagement in the context of supportive housing. This document can be used as a tool in interactive, participatory staff training.
- **Role of the Case Manager**: This document provides an overview of the types of functions performed by a case manager working in a supportive housing environment. This list is intended to be inclusive, but not prescriptive, as individual projects will require different functions of their case managers.
- **The Process of Goal Setting**: This checklist provides a framework for one-on-one goal setting conversations between a case manager or other staff person and a supportive housing tenant.
- **Motivational Interviewing**: This tool describes the five general principles of motivational interviewing, a technique that can be used when working in partnership with a resident toward needed changes.
- **Using Referral Sources**: This checklist provides general guidance about working with outside entities to which you may refer residents for services.
- **Developing an Individual Service Plan**: This checklist provides an overview of the process of developing a service plan with the resident, including the importance of it being a resident-driven activity.
- **Sample Individual Service Plan Form**: This blank template is designed to help ensure that the service plan identifies the goals as well as the means to achieve them, and includes specification of the responsible party for each action step as well as discrete timeframes for achievement of each goal and outcomes.



- **Sample Goal Setting Worksheet**: This template (with illustrative sample entry) is intended as a complement to the overall individual service plan. For each goal, action steps and responsibility for action steps are documented.
- **Guidelines for Case Records**: This informational piece discusses why documentation is critical to supportive services delivery and provides sample supportive services (i.e. case management) file contents, including, but not limited to, the above referenced components and samples.
- **Community Building in Supportive Housing Developments**: This informational piece provides guidance for helping tenants to foster productive relationships both within the supportive housing project and the surrounding community. A list of questions is included to help guide the development of a community building plan.
- **History of Community Building in Supportive Housing**: This training tool describes early experiences with community building in supportive housing, and the resulting benefits.
- **Benefits of Community Building in Supportive Housing**: This short informational document describes the many benefits community building may bring to a housing site.
- **Preparing a Plan for Community Building Efforts**: These questions in this document are intended to guide planning, resource allocation, and evaluation during community-building efforts.
- **Social Norms and Organizing Issues Worksheet**: This worksheet can be used to facilitate discussion at meetings with community members or it might initially be used by trainees who can begin putting ideas on paper to be shared with the larger community in the future.
- **Tenant Participation in Supportive Housing Settings**: This informational piece describes strategies to involve tenants in program and policy design at every stage of project development, implementation and operations, including formation of tenant councils.
- **Involving Tenants in the Decision-Making Process**: This document describes the opportunities for tenants to impact their environment through involvement in the day-to-day decisions in supportive housing projects.

C. Preparing for Tenants' Service Needs

Beyond day-to-day case management, supportive housing projects may offer more targeted, in-depth services in certain areas depending on the nature of the target population and the overall mission of the project. The following tools are intended to assist providers that wish to tailor their services to specific defined target populations or design a project such that a specific goal for residents, for example employment, is highlighted.

Tools for Preparing for Tenants' Services Needs:

- **Employment Services in Supportive Housing**: This informational piece provides an overview of supportive housing-based employment services and defining the goals for employment-related services.
- **Employment Services for People Who Have Disabilities**: This document discusses additional information and specific considerations for working with people with histories of



mental illness, HIV/AIDS, and substance use, and it also includes a brief discussion about homelessness, which is a circumstance experienced by many individuals who enter supportive housing.

- **Creating a Culture that Promotes Work**: This piece describes steps a provider can take to encourage tenants to participate in employment activities.
- **Self-Assessment: Employment History and Preferences**: This tool will assist tenants and case managers or employment/vocational counselors to assess skills and readiness for employment.
- **Understanding Mental Illnesses**: This document provides fundamental information about working with individuals who have mental illness and discusses strategies for developing and shaping supportive housing programs to promote recovery and self-sufficiency.
- **Overview of Community-Based Mental Health Services**: This informational piece describes the continuum of services for persons with mental illness who are living independently in the community.
- **Ten General Principles for the Use of Psychiatric Medications**: This informational piece will be useful for staff who work with persons taking psychiatric medications and should enhance staff understanding of relevant concomitant issues, such as the consequences of non-compliance.
- **Substance Use Services and Supportive Housing**: This informational piece describes essential program components for housing programs that serve persons with histories of substance abuse, including setting clear expectations for behavior, providing individual counseling and access to community resources, staff training issues, planning for recovery, and understanding relapse triggers.
- **Substance Use Policy and Program Development Questionnaire**: This tool can help guide the development of substance use policies in supportive housing settings.
- **Introduction to Harm Reduction Concepts**: This informational piece defines harm reduction and provides key principles to guide service delivery in the harm reduction mode.
- **HIV Services and Supportive Housing**: This document provide useful background information on issues relevant to housing persons with HIV/AIDS and related conditions, is primarily intended for non-clinical staff, and provides links to websites for access to up-to-date HIV/AIDS treatment information.

V. Additional Resources:

Users of this Toolkit are also encouraged to consult the following resources:

- **The Butler Furniture Calculator**. This tool, provided by CSH Affinity Partner Butler Furniture, can help organizations estimate their furniture costs, either when planning for new supportive housing, or estimating the cost of replacing furniture in existing supportive housing.
- **The Supportive Housing Training Series**. This 12 module training curriculum, developed by CSH and CUCS for HUD, provides a solid training foundation for staff working in a supportive housing setting.
- **Toolkit for Ending-Long Term Homelessness**. This toolkit highlights the most promising practices for serving people who have been homeless for months and years on



end, including profiles of supportive housing programs and projects across the country that are successfully housing people who have been homeless for the long term, interactive photo tours of eight of these projects, and sample documents.

- **Supportive Housing Financing Guide**. The financing guide provides details on all major federal supportive housing financing sources, with program descriptions and links to the regulations, resources on everything from how to use Medicaid in supportive housing to understanding Low Income Housing Tax Credits, links to current funding opportunities, and details on relevant state programs for California, Connecticut, Illinois, Michigan, Minnesota, New Jersey, New York, Ohio, and Rhode Island.
- **Publications webpage**. The CSH publications page is the portal through which CSH makes available reports, studies, and manuals aimed at helping nonprofits and government develop new and better ways to meet the health, housing and employment needs of those at the fringes of society.