



MFP Housing Transition Structure: *Washington Model*

This document was prepared by New Editions Consulting, Inc. as part of the Housing Capacity Building Initiative for Community Living project to facilitate government agencies and other organizations to establish mechanisms to support interagency collaboration, under the Housing Collaboration under the Money Follows the Person (MFP) Rebalancing Demonstration project, CMS Contract Number GS-00F-0083N.

MFP Housing Transition Structure: Washington Model

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Executive Summary

A major challenge to achieving transitions from institutions into the community under the Medicaid Money Follows the Person Rebalancing Demonstration Project (MFP) is the availability of qualified housing options for MFP participants.¹ Washington, among other states, has had great success with a dedicated housing staff and as a result, The Centers for Medicare and Medicaid Services (CMS) recommends MFP programs use administrative funds to hire MFP housing specialists.

This report synthesizes the Washington MFP experience and presents it as a model with actionable recommendations for other state MFP programs on finding housing champions, understanding housing needs in the transition process, creating a housing-focused job description, training housing specialists, supporting team work, and building communication and collaborations.

The purpose of this resource is to describe and provide insights into the development of Washington's MFP "Roads to Community Living" (RCL) program. It includes defined roles, functions, and the organizational structure of its dedicated housing staff while providing a step-by-step guide for state MFP programs. This report includes samples:

- » showing where the MFP program and its housing team fit within Washington's Department of Social and Health Services (DSHS);
- » identifying service needs and making the case for the housing specialists' positions;
- » defining the role of the MFP Project Director in housing;
- » defining the roles and job responsibilities of the MFP housing specialists, including preferred knowledge and skills;
- » recruiting MFP housing specialists with diverse expertise and building team work;
- » demonstrating the role of the MFP housing team in transitioning RCL participants from institutions into independent housing; and
- » demonstrating the role of the MFP housing team in specific collaborations between the MFP program and housing agencies.

¹ For information on the Federal/State Money Follows the Person (MFP) Rebalancing Demonstration program, under the Centers for Medicare and Medicaid Services (CMS) visit: <http://www.medicaid.gov/Medicaid-CHIP-Program-Information/By-Topics/Long-Term-Services-and-Support/Balancing/Money-Follows-the-Person.html>

How to Use this Document

A major challenge to achieving transitions from institutions into the community under the Medicaid Money Follows the Person Rebalancing Demonstration Project (MFP) is the availability of qualified housing options for MFP participants.² Washington, among other states, has had great success with a dedicated housing staff and as a result, CMS recommends MFP programs use administrative funds to hire MFP housing specialists.

The purpose of this report is to describe and provide insights into the development of Washington's approach to the roles, functions, and organizational structure of its dedicated housing staff. Key samples of charts, job descriptions, recruiting material, and Memorandum of Understanding with housing agencies are attached for reference.

State MFP programs can use this as a guide to recruiting and structuring housing staff in their states by understanding and tailoring Washington's organizational chart, roles, responsibilities, recruiting, and team building elements to their own state MFP programs.

Washington's Organizational Chart

Washington's Department of Social and Health Services (DSHS) had an excellent record of providing home and community based services for persons with disabilities and seniors prior to the MFP program and they have continued to expand and enhance their program under MFP.

The Washington MFP program, which began in 2008, is known as the "Roads to Community Living" (RCL) program.³ The RCL Project Director is located in DSHS, Aging and Disability Services

Administration (ADSA), under the Division of Home and Community Services (HCS), in the Home and Community Programs Unit. [See Organizational Chart, Attachment A]

Department Level Housing Staff: DSHS has a housing coordinator who reports to the DSHS Assistant Secretary for Planning, Performance and Accountability. The housing coordinator covers all of the Department's programs, coordinating externally with housing and other stakeholders, and internally with the various programs throughout the department, including the RCL program and its housing specialists. [See Attachment C].

Housing Staff Structure: MFP = RCL program

- » 1 DSHS-Department-wide Housing Coordinator/Liaison
- » 1 RCL Housing Specialist in each region
- » Local Community Choice guides work with Case Managers

2 For information on the Federal/State Money Follows the Person (MFP) Rebalancing Demonstration program, under the Centers for Medicare and Medicaid Services (CMS) visit: <http://www.medicaid.gov/Medicaid-CHIP-Program-Information/By-Topics/Long-Term-Services-and-Support/Balancing-Money-Follows-the-Person.html>

3 For information on the Washington State Road to Community Living/MFP program, visit: www.adsa.dshs.wa.gov/professional/roads/

Before the RCL program hired its own regional housing specialists, the DSHS housing coordinator was the only housing expert inside the department available to advise the RCL Project Director. These two individuals worked together to articulate the housing gaps and needs for the RCL program, including the need to hire dedicated housing specialists.

Regions. DSHS divides the state into three regions. [See State Map, Attachment B] Region I includes 20 counties in the eastern part of the state, with a DSHS Regional Office in Spokane, and secondary office in Yakima. Region II includes six counties in the north-central part of the state, with a Regional Office in Seattle and a secondary office in Everett. Region III includes 13 counties in the southwestern part of the state, with a Regional Office in Tacoma and a secondary office in Vancouver. Smaller offices are also located in each region.

Regional RCL Housing Specialists. The RCL program funds a housing specialist responsible for developing independent housing options in each of these regions. In addition, there are two HCS resource developers in each region who work with the housing specialists and field staff in developing support services and specialty providers. Half of the resource developer positions are funded by the RCL program.

Nursing Home Case Managers. DSHS’s HCS case managers (CM) provide transition coordination services for RCL participants, including assessments and service plans. CMs can also refer individuals to community choice guides (CCG), who help them find housing and provide additional support and training to help them make a successful transition to independent living. The CCG is included as a demonstration service within the RCL program.

Division of Developmental Disabilities. This division has an RCL coordinator and housing staff who support their residential programs (typically MFP-qualified community residential licensed or certified settings).

Gaps Identified

In the beginning of the RCL program, CMs were challenged by the lack of access/availability of independent/individual rental units or other subsidized housing for individuals who wished to move back into their community. CMs had limited time and resources to conduct a successful search for housing, negotiate with property managers and landlords, or perform other housing-specific tasks.

The RCL program addressed this service

Identifying Need for RCL Housing Specialists

- » Housing placement was complex, beyond the CM’s resources
- » Need for coordination & training of local Community Choice Guides
- » New HUD vouchers opportunity for RCL participants

gap by defining local housing and community support providers as a demonstration service covered under the RCL program. These CCGs are either associated with non-profit agencies or are independent contractors with experience and contacts in local communities. They are recruited and managed by DSHS field staff. CCGs perform the “leg work” tasks necessary in a housing search and help RCL participants with the application process for rental units they select, which in some cases also means assisting the participant to get necessary identification documents. CCGs work closely with RCL housing specialists.

Perfect Timing: New Funding from MFP and New Housing Resources

Beginning January 1, 2010, CMS made 100% MFP administrative funding available to the states to cover administrative costs without state matching funds. Around the same time, the U.S. Department of Housing and Urban Development (HUD) issued a notice of funding availability (NOFA) for additional special Housing Choice Vouchers (formerly the Section 8 rent subsidy program) specifically for Non-Elderly Disabled (NED) individuals transitioning from nursing homes and other institutions into independent housing. This NOFA required local Public Housing Agencies (PHAs) to name a service agency partner that would refer eligible applicants for these special rent vouchers. This was an exciting opportunity for the RCL program to access new housing resources. Dedicated RCL housing specialists were needed to facilitate the essential linkages between the various transition staff, the RCL program, and the housing agencies, landlords, and property managers.

Presenting the Need for Housing Specialists

The 100% MFP administrative funds provided a funding source for hiring housing specialists to assist in developing resources for MFP transitions, troubleshooting, engaging in creative problem-solving with CMs and landlords, and helping with the new NED vouchers.

The challenge was to ensure that each region had one staff person who was dedicated to housing programs and issues.

Key points used by the RCL Project Director to make the case for dedicated housing specialists were:

Making the Case for Dedicated Housing Specialists

- » Need to “Speak” Housing
- » Need expertise and contacts among housing programs
- » Need staff focused on housing issues

- » **Housing has a different “language” and process:** Housing programs, agencies, and providers use significantly different terminology than DSHS programs and

providers. They also have different priorities, planning processes, organizational structures, leadership styles, timelines and cycles, funding mechanisms, and eligibility and application processes, etc., all of which must be understood by an RCL housing specialist.

- » **Housing staff have a different resume and contacts:** The professionals who have housing knowledge and experience typically have a different resume than professionals who develop and manage home and community-based services. They also often have established contacts among housing organizations that can serve as a bridge.
- » **Dedicated housing coordination was needed:** Internal housing expertise and focus was needed to address policy issues within each region and across the state, as well as to develop and maintain relationships with the PHAs and support them as they implemented the new NED voucher program and other housing programs.

Role of the RCL Project Director in Housing

The RCL Project Director's role in housing includes:

- » **Recognition and Support:**
 - » Actively support the importance of having independent housing options available for people who wish to move from institutions into the community.
 - » Provide ongoing support for potential housing resource opportunities to support the RCL mission.
- » **Communication with DSHS Housing Liaison:**
 - » Maintain a strong working relationship with the Department's housing liaison/coordinator.
- » **Hire and Supervise Housing Specialists:**
 - » Secure approval to hire regional RCL housing specialists, develop their job description, and recruit individuals to fill those positions.
 - » Take an active role as their supervisor in encouraging team work and creative problem solving within their respective regions and in statewide, cross-cutting issues.
 - » Provide training opportunities to housing specialists, and support their outreach to other housing agencies and organizations.

Role of the RCL Project Director

- » Recognize and articulate importance of housing
- » Develop key relationships
- » Hire and support housing specialists

- » Provide consistent policy approach to the development of housing policy, procedures and internal/external contracts and memoranda of understanding.

Role of the RCL Regional Housing Specialists: Job Descriptions

The three regional RCL housing specialists provide an important link between statewide DSHS staff and programs, the field-level CMs and CCGs. The housing specialist job description [see Attachment D] is dedicated to housing policies and programs which include responsibility for:

- » Developing regional and statewide partnerships and resources to increase availability and access to affordable and accessible housing for individuals with complex needs
- » Working closely with local housing authorities and other organizations related to independent housing options
- » Working with the Regional Resource Developers, CMs and CCGs in creative problem-solving
- » Providing analysis and guidance to the agency's upper management on RCL qualified community housing issues as they affect DSHS
- » Contributing to the formation of statewide policy and long range strategic direction by:
 - » Providing subject matter expertise
 - » Articulating principles related to housing development and partnerships needed to increase access to and availability of affordable and accessible housing
- » Implementing state housing programs throughout each region and the state
- » Increasing housing resources to achieve savings associated with relocations from institutional to community based service settings.

RCL Housing Specialists' Job Description:

- » Develop key relationships with state, regional & local housing organizations
- » Increase housing options for RCL participants
- » Serve as housing experts in DSHS's state & regional planning & problem-solving

Recruiting for the Regional RCL Housing Specialists

The RCL Project Director aimed to recruit candidates for the regional RCL housing specialists positions who demonstrated [see Attachment E]:

- » Experience in the low-income housing and/or community services field
- » Knowledge of home and community based services, and area agency on aging operations
- » Understanding of programs, principles, regulations and statutes related to community based long term care
- » Knowledge of principles, practices and techniques in housing planning and development, including HUD rules and regulations
- » Understanding of and commitment to the principles of person centered planning, participant choice and self-direction.

RCL Housing Specialists' Knowledge & Skills:

- » Low-income housing, housing planning & development, & HUD rules
- » Home & community based services & aging
- » Commitment to participant choice
- » Excellent communication skills
- » Ability to develop positive relationships

In addition, the candidates should have skills in:

- » Providing training and technical assistance
- » Community development and project planning
- » Excellent communication skills, ability to write and speak concisely to partners and agencies, both public and private, among diverse populations
- » Demonstrated ability to develop positive working relationships with a broad range of entities.

Achieving a Diverse Housing Specialists Team

The three regional RCL housing specialists have diverse and complementary experience and expertise that result in a strong housing team for the RCL program:

- » A former deputy director of a local public housing authority
- » A professional previously employed by various city-level housing programs, including Continuum of Care projects for chronic homelessness

- » A professional case manager from DSHS HCS who was self-taught in housing programs.

This diversity has been useful in:

- » Providing a rich source of established contacts and perspectives
- » Speeding up the team’s learning curve
- » Assigning specific housing resource development tasks.

RCL Housing Specialists’ Diversity:

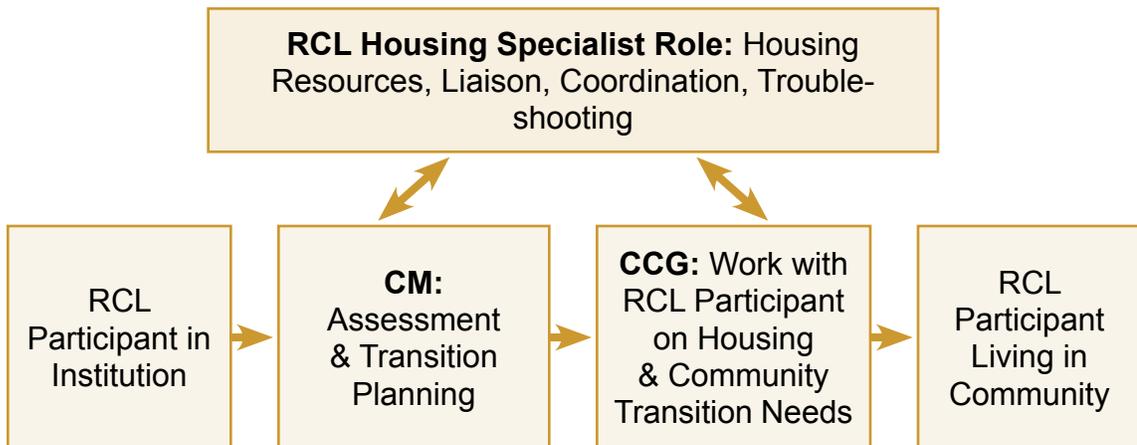
- » From a local PHA
- » From a city homelessness project
- » From DSHS HCS
- » Diversity broadens pool of contacts & speeds learning curve

The team’s first joint project was assisting in the successful implementation of the NED vouchers awarded to five PHAs in the state. The team had to quickly understand the special needs of the RCL participants, the structure of long term services and supports systems, and the various PHAs’ individual policies and procedures.

Each housing specialist has been assigned the lead for a housing resource development task:

- » Housing locator system
- » Housing bridge subsidy using state MFP rebalancing funds
- » HUD Section 811 Project Rental Assistance application with Washington’s Department of Commerce.

The three housing specialists are located in their respective Regional offices, providing important local access to the DSHS regional and field personnel. They stay in close touch by phone and email, with weekly team calls and monthly calls with the RCL Project Director. The housing specialists serve as internal subject matter experts for each other, to others in their assigned regions, to others within the department, and across the state.



Housing Transition Coordination at the Participant Level

Part of the Process of Transitioning RCL Participants to the Community⁴

Transitions from nursing homes and other institutions are coordinated locally by DSHS field CMs. These CMs conduct client assessments and service planning for RCL participants. The CM service plan provides the authorization for additional housing services and community living transition services. If the participant is likely to need assistance in finding suitable housing in the community, the CM may authorize referral to a CCG for specialized assistance in finding suitable housing in the community and adjusting to their new home and community life.⁵

RCL Housing Specialists Role in Transitions:

- » Translating housing to Case Managers
- » Translating RCL & services to housing
- » Trouble-shooting
- » Identifying resources
- » Building relationships

Community Choice Guides (CCGs) are a contracted option for intensive one on one relocation support for individuals moving from qualified institutional settings to qualified community settings needing help locating, arranging for, and/or maintaining housing. These services are provided only as authorized by case managers in the participant's Service Plan. Services may include the following:

- » Locating and arranging for appropriate, accessible housing, including available vouchers or subsidies
- » Setting up the participant's new home, including services such as arranging utility hook-ups and the acquisition of furnishings and household goods
- » Arranging the participant's physical move from the institutional setting
- » Coordinating between the participant and housing provider.

CCGs are also a contracted option for intensive one-on-one relocation support for individuals moving from qualified institutional settings to qualified community settings, when authorized in the participant's service plan. Services may include the following:

- » Conducting an RCL pre-transition consultation with potential participants
- » Acting on behalf of CMs to provide liaison services between nursing facility and in-home case management, staff at nursing facility and other institutional settings, housing, medical personnel, legal representatives, formal caregivers, family members, informal supports and any other involved party

⁴ Source: RCL staff.

⁵ Source: <http://www.aasa.dshs.wa.gov/professional/roads/>

- » Providing authorized assistance and support to ensure the participant’s successful transition from the institutional setting into the community.

RCL Housing Specialist Role. The three regional RCL housing specialists take an active role in the successful transition of RCL participants into qualified housing in the community by providing training and supporting the CMs and CCGs in:

- » Translating the housing agencies’ programs, policies, procedures, schedules, application processes, etc. to the CMs and other DSHS field staff and contractors
- » Translating the RCL program and other home and community services policies, procedures, schedules, transition processes, etc. to housing organizations
- » Trouble-shooting and creative problem-solving using personal expertise and/or contacts to address housing issues that might arise at the RCL participant level, with a specific local organization, within the region, or statewide
- » Identifying potential housing units and resources for particular RCL participants
- » Developing ongoing relationships with housing agencies, property managers, landlords and others.

Examples of How Dedicated Housing Staff Facilitate Productive RCL-Housing Collaborations

The following examples illustrate the role of the DSHS Housing Coordinator and the RCL housing specialists in facilitating productive collaborations between services and housing agencies.⁶

Setting the Stage: Prior Collaborations

In early 2010, a year before the RCL housing specialists were hired, HUD announced its NOFA for the NED-2 vouchers. The DSHS Housing Coordinator, working with the RCL

Project Director, seized the opportunity for these new housing resources. They reached out to public housing agencies throughout the state to encourage them to apply for this special round of vouchers.

Dedicated Housing Staff Contributions:

- » Prior MOU as starting point for MFP-PHA collaboration
- » Trouble-shooting implementation of special vouchers
- » Policy and procedure improvements
- » Application for new housing funds

⁶ *Source:* Interviews with DSHS staff, and “Collaboration is Key: Housing challenges and learning strategies in WA State,” presentation to the *CMS-Housing Capacity Building Initiative for Community Living* project’s Regional Training, Seattle, WA, May 31, 2012.

The NOFA required that the PHA designate a services partner responsible for referring the qualified voucher participants and providing services and supports for the participants. The RCL program would serve in this role. Although the RCL program was only in operation for two years, DSHS had prior collaborations with a number of the PHAs under various housing-with-services initiatives.

One benefit of these prior collaborations was the availability of written agreements between DSHS and PHAs. For example, one of the earlier efforts of the DSHS Housing Coordinator was to draft a uniform Memorandum of Understanding for the department to use with PHAs under the HUD Family Unification Program (FUP), which provided rental assistance to families in danger of losing their children to the child welfare system due to inadequate housing, and to youth aging out of foster care. This MOU served as the model and starting point for the MOU used by DSHS and the PHAs under the NED-2 voucher program.

Other benefits of prior collaborations, and having a DSHS Housing Coordinator who had established credentials among the PHAs, were: 1) the ability to openly discuss the PHA's concerns; 2) work on solutions and define DSHS's ongoing role and responsibilities; and 3) provide a bridge between DSHS and housing champions in negotiating the terms of the new MOU.

RCL Housing Specialist's Role in NED-2 Vouchers Implementation

In early 2011, five local PHAs were awarded a total of 215 HUD NED-2 vouchers, with the RCL program as their services partner. Within a few months, the three RCL housing specialists were hired, and their immediate task was to facilitate implementation ("lease-up") of these vouchers.

The RCL housing specialists, DSHS Housing Coordinator, the RCL Project Director, others in DSHS and in the PHAs worked together to address a number of policy and procedure enhancements to accommodate the complex circumstances concerning many of the RCL participants transitioning from institutions into NED-2 qualified independent rent-subsidized housing in the community with services and supports. These enhancements included:

- » Tailoring the Housing Choice Voucher application and briefing process to RCL participants' circumstances, including a fast-track application process, faster denials, and permitting briefings in the nursing facilities rather than at the PHAs.

Benefits of Prior Collaborations:

- » Availability of written agreements to adapt
- » Trusted relationships to constructively address concerns.

RCL Housing Specialist's and NED-2 Implementation:

- » Tailoring application process to participant circumstances
- » Addressing housing accommodations
- » Communications and data sharing

- » Addressing RCL participants' housing-related considerations, including inspections, accessibility issues, reasonable accommodations, extending the housing search timeframe, and recertification.
- » Supporting improved communications among the various agencies with regular meetings, maintaining a client tracking system, improving information sharing between staff and clients, and reaching out to landlords and property managers.

Developing Policy/Systemic Changes

The work of the three RCL housing specialists to lease-up the NED-2 vouchers resulted in policy and systemic changes that assist the RCL program staff at all levels to access housing resources for participants wishing to transition from institutions, including:

- » Increased collaborations linking the RCL program with: regional consortia of affordable/low-income housing developers and operators, Continuum of Care networks, local jurisdictions' housing and community services programs, and individual and independent landlords willing to accommodate RCL participant-related issues
- » Enhanced methods to address RCL participant issues, including:
 - » Personal documentation needs, such as current picture ID's, birth certificates, and SSI/SSA income certification
 - » Criminal histories and poor payment/credit histories
 - » Drug and alcohol issues, including chronic pain treatment
- » Greater access to Housing Choice Vouchers by developing and implementing a "porting" process (using the voucher in a different PHA's jurisdiction) at the time of application.

RCL Housing Specialist's and Policy Changes:

- » Expanding RCL program's housing collaborations
- » Addressing RCL participant issues
- » Enhancing voucher options

DSHS/RCL Role in Washington's HUD Section 811 Application

In spring 2012, HUD announced its NOFA for the new Section 811 Project Rental Assistance demonstration program for low income persons with disabilities. Washington's Department of Commerce was the lead housing agency for this NOFA. HUD expected the housing agency applicants to have agreements with their states services agencies.

The DSHS Housing Coordinator and RCL housing specialist participated in defining the roles and responsibilities for the various agencies under the Section 811 MOU, using

their MOU developed for the NED2 Vouchers as a starting point. DSHS' roles and responsibilities included:

- » Identifying the targeted participants and educating Section 811 partners about the participant dynamics
- » Developing relationships with affordable housing developers/landlords, particularly to help streamline the referral process
- » Providing elective supportive services tailored to the participant's needs
- » Working with the Department of Commerce and the Housing Finance Commission to establish and demonstrate an effective outreach and referral process for project rental assistance subsidies.

Recommendations for Building Dedicated MFP-Housing Staff in Other States

Using Washington's MFP – Roads to Community Living program as a successful model, here are some steps that MFP project directors should consider in building their programs' housing specialists staff:

- » **Find housing champions in services agencies.** Look around your agency and locate people who currently, or have in the past, participated in housing partnerships, such as homelessness prevention initiatives, mental health services, etc. These staffers bring expertise, established relationships, and possibly written agreements or MOUs that may be leveraged for MFP participants.
- » **Understand the transition process and players at the participant level.** How are they finding housing now? What help do they need? These data can be used to define the personnel needed, where they should be located, and roles and responsibilities. This data can help make the case for hiring dedicated housing specialists.
- » **Focus the job description and recruiting.** Job descriptions for housing specialists should provide specific objectives, responsibilities, and tasks in locating and developing housing resources.

Steps to Build Dedicated MFP-Housing Staff:

- » Find housing champions
- » Understand housing needs in transition process
- » Housing-focused job description
- » Plan for training in MFP/Medicaid basics
- » Emphasize team work
- » Communicate and collaborate

- » Determine if the housing specialists will work with individual participants to help them find housing, or to promote systemic change in your state, or both.
- » Determine if different staff will be engaging in different housing activities with some working with individuals and others facilitating systemic change, or if all the housing specialists will engage in all activities.
- » Determine whether the housing specialists will be located and/or work regionally or centrally.
- » Determine their status as state employees and/or independent contractors; and if organizations can contract for selected tasks.
- » Require housing-related knowledge and experience, as well as skills in outreach and collaboration.
- » Post the notice of the housing specialist positions with housing agencies and housing professional organizations, as well as community based services organizations.
- » **Recognize and support the learning curve.** Once the housing specialists have been hired, plan time for training in the key elements of the MFP program, Medicaid waivers, and related services.
 - » Housing professionals are likely to need orientation to the special issues of MFP participants, such as: the extended length of time it may take to complete a successful transition, how to help people with an extremely low income find housing, how people with complex behavioral and medical conditions can be served in the community, and challenges MFP participants may encounter such as completing rental applications, lack of documentation, and credit and criminal histories.
 - » Designate a “go-to” person who can answer the housing specialists’ questions quickly and collegially.
- » **Emphasize team work.** Successful transitions for MFP participants require team work within and across state agencies, with local housing and services providers, and with stakeholders at all levels.
 - » The housing specialists should participate as full team members, contributing their expertise and leveraging their contacts, internally and in collaborative activities.
 - » They should provide training, advice on housing policies and programs, and the housing perspective.
- » **Establish and support relationships and communications.** Formal and informal lines of communication should be established internally and externally among representatives of key state and local organizations, and stakeholders

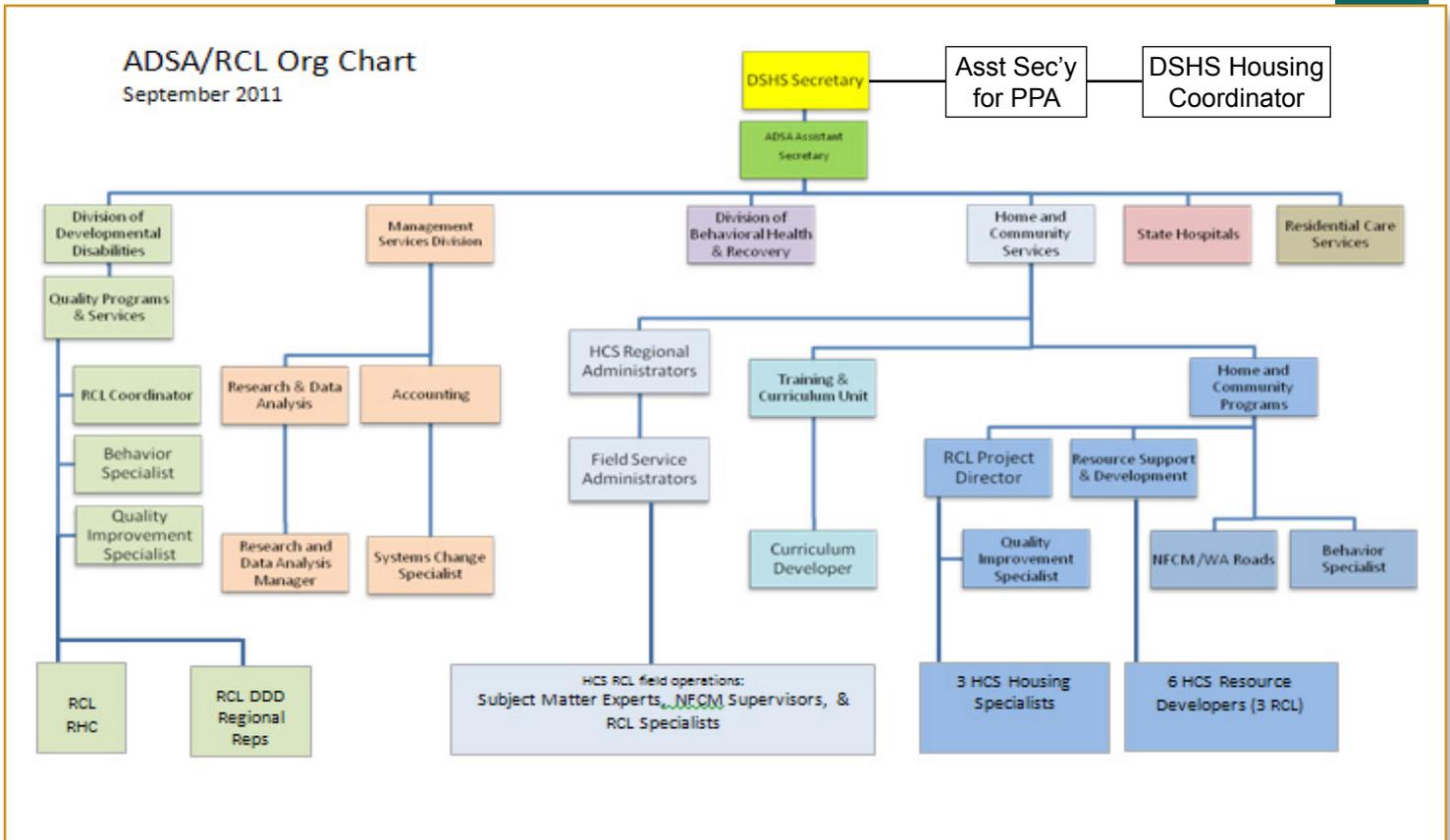
which should include housing specialists and other MFP/services staffers as they collaborate and communicate through meetings, calls, data tracking and sharing, policy development, training, etc. Establishing and supporting these relationships and communications require time and resources, but the return on investment is well worth it.

This brief was prepared by Stephanie Mensh of New Editions Consulting, Inc. For additional information and related resources, visit <http://www.neweditions.net/housing>.

Abbreviations and Acronyms

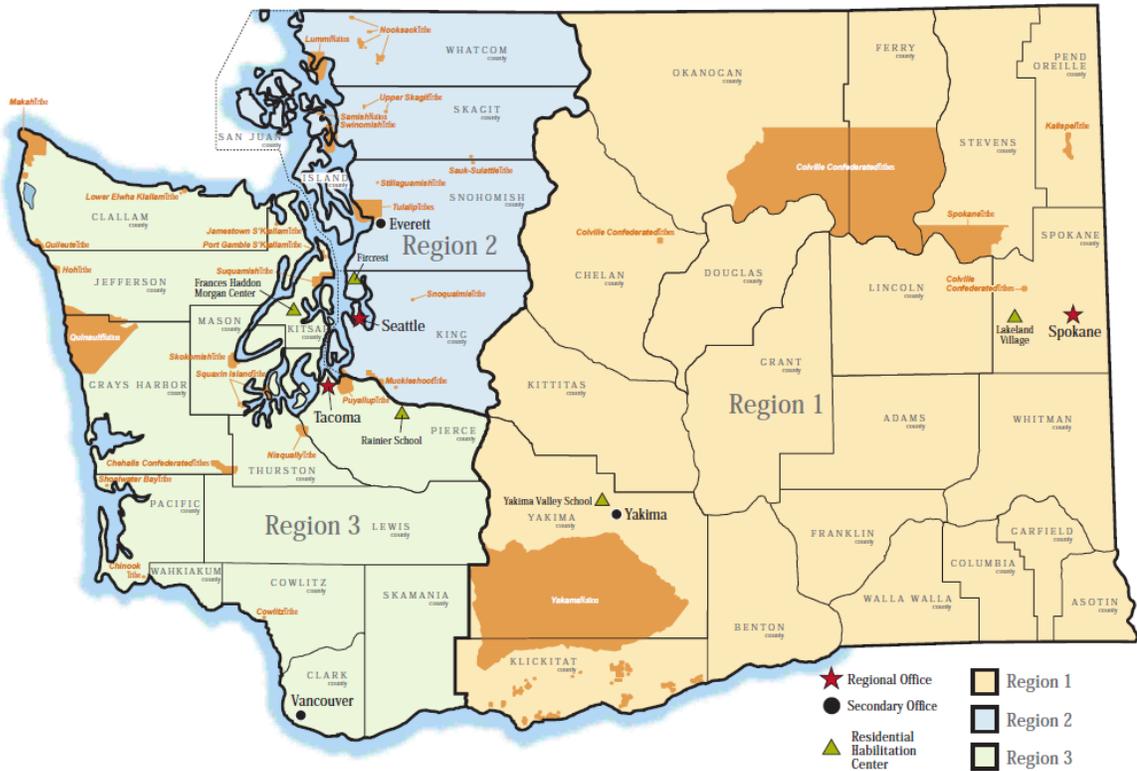
MFP	Money Follows the Person Rebalancing Demonstration Program
RCL	Roads to Community Living program (Washington’s MFP program)
DSHS	Department of Social & Health Services
ADSA	Aging and Disability Services Administration
HCS	Home and Community Services
CMS	Centers for Medicare and Medicaid Services
CM	Case Manager (Transition Coordinator)
CCG	Community Choice Guide
HUD	U.S. Department of Housing and Urban Development
NOFA	Notice Of Funding Availability (HUD’s grants announcement)
NED-2	Non-Elderly Disabled Category 2 Housing Choice Vouchers (for individuals transitioning out of institutions)
PHAs	Public housing agencies or authorities

Attachment A: Aging & Disability Services Administration/Roads to Community Living Organizational Chart⁷



⁷ Source: RCL Program

Attachment B: DSHS Regional Map⁸



Effective May 1, 2011

8 Source: RCL Program

Attachment C: Job Duties for Department's Housing Coordinator⁹

The Department of Social & Health Services' Housing Coordinator serves as DSHS's housing expert and advisor.¹⁰

The Housing Coordinator reports to the DSHS Assistant Secretary for Planning, Performance and Accountability, covering all of the Department's programs, coordinating externally with housing and other stakeholders, and internally with programs throughout the department, including the RCL program and its housing specialists.

The DSHS Housing Coordinator's roles and responsibilities include:

- » Building and sustaining strategic partnerships that help the Department
 - » Maximize and leverage resources to increase affordable housing opportunities for vulnerable populations,
 - » Reduce homelessness among vulnerable populations
 - » Successfully transition individuals from institutional to home- and community-based settings.
- » Outreach to local and statewide:
 - » Social service delivery systems
 - » Housing resources
 - » Population-specific program needs, ranging from children aging out of foster to individuals transitioning back into home and community-based setting from institutions.
- » Playing a key role in the rebalancing efforts focused on transitioning individuals from institutional to community-based settings that meet their identified needs for services and supports
- » Developing consistent strategies to address the housing needs of the various populations served by the Department
- » Informing and coordinating housing and homelessness related research
- » Informing housing policy and budget decisions impacting the Department

⁹ Note: This position description is provided for background information to understand the roles and responsibilities of the Department-wide Housing Coordinator. MFP Project Directors would be hiring MFP Housing Specialists, whose roles and responsibilities would be similar to the Regional Housing Specialists job description provided in Appendix D.

¹⁰ Source: DSHS staff.

- » Offering housing policy advice to other state agencies, local public housing authorities, community-based organizations and philanthropy
- » Sharing best practices within the Department as well as with community partners
- » Representing the Department on cross-agency, inter-agency, and community-based workgroups related to reducing homelessness and increasing affordable housing opportunities among vulnerable populations, including RCL participants.

Attachment D: Job Duties for Regional Housing Specialist

Increase state housing capacity for individuals transitioning from institutional settings to the community, including but not limited to:

- » Working with a state level team to design a strategic approach to HCBS housing resource support and development across all DSHS regions including goals, objectives and continuous evaluation at both the state and regional level.
- » Managing Non-elderly disabled (NED) housing choice vouchers in the assigned Region and statewide as necessary.
- » Utilizing specific knowledge of applicable CFR's and available HUD NOFA processes, collaborate with community partners to increase the ADA accessible housing capacity in each community.
- » Developing and managing 811 and 202 programs in the assigned Region and statewide as necessary.
- » Providing input to RCL Team and ADSA management teams about training needs, specialized rates and incentives, contracting assistance, consultative services and other housing assistance.
- » Assessing HCS, AAA, and provider training needs regarding assisting individuals in locating and maintaining affordable and accessible housing options.
- » Coordinating with local housing authorities, non-profit and for-profit housing providers, HCS Residential Policy team, Residential Care Services and others to develop housing resources necessary for successful transition and community tenure of people leaving nursing facilities and other institutional settings
- » Propose, coordinate and develop alternative models of community based living such as shared housing, housing with services, and long term care supported living models. Implement models throughout the assigned HCS Region.
- » Act as a consultant to field staff and contracted providers with regards to housing and program issues.

Serving on statewide workgroups to develop policies, procedures, and other improvements to housing programs. This includes preparing, developing, and providing training/presentations to program meetings and conferences.

- » Developing a continuing process for analysis and reporting on community housing development goals and objectives to executive management.
- » Participating in outreach and follow-up efforts, particularly with property managers, landlords, and housing developers.

- » Stay current on national trends and innovations in community based housing options.
- » Train HCS/DDD field staff regarding housing options/program availability and access.

Attachment E: Recruitment Announcement for Regional Housing Specialist¹¹

POSITION: RCL Housing Specialist: Region

AGENCY PROFILE:

DSHS Vision

Safe, healthy individuals, families and communities

Mission

The Department of Social and Health Services improves the safety and health of individuals, families and communities by providing leadership and establishing and participating in partnerships.

Values

Excellence in Service; Respect; Collaboration and Partnership; Diversity; Accountability

The Aging and Disability Services Administration (ADSA) serves children, adults and seniors with chronic illness, developmental disabilities, cognitive impairment, and related functional disabilities. ADSA helps clients secure health services, long term care and supportive services that are high quality and responsive to individual needs. ADSA works with individuals and their families, consumer advocates, tribes, providers and multiple community partners to assist individuals and families to plan for and manage their long-term care needs and responsibilities.

POSITION OBJECTIVE:

This position is 100% federally funded as part of Washington State's Money Follows the Person (MFP) grant initiative to develop and support resources necessary to move individuals with complex needs from institutional to home and community based settings. Roads to Community Living (RCL) is Washington State's MFP demonstration project. This is a project position which extends through 2016.

This position is part of a state level team assigned responsibility for statewide development of partnerships and resources to increase availability and access to affordable and accessible housing for individuals relocating from institutional settings across the Home and Community Services (HCS) regions. This position will work closely with local housing authorities, as well as other non-profit and for-profit organizations. The position provides extensive expert analysis and guidance to HCS upper management on RCL qualified community housing issues as they affect DSHS. The position will assist in formulating statewide policy and long range strategic direction in the housing arena.

¹¹ Source: RCL staff.

PRINCIPAL RESPONSIBILITIES:

Increase state capacity in Home and Community Based Services (HCBS) by supporting and developing current RCL qualified community setting providers and developing new qualified options based on regional needs. Work with the state-wide Resource Developers and RCL team to develop and implement a work plan for HCBS housing support, partnerships and development in HCS regions that includes needs assessment, identifying current capacity, identifying partnerships and development opportunities.

Needs Assessment

- » Assess utilization of current Home and community Based Services (HCBS) housing resources including an analysis of consumer needs and geographical variations.
- » Analyze unmet need for housing resources and types with input from current providers, HCS and Area Agency on Aging (AAA) staff, housing authorities, HCBS consumers, community stakeholders and others as appropriate.
- » Assess development and support needs of current HCBS housing providers.
- » Provide input to Systems Change Specialist, Resource Developers, Training Curriculum Specialist and related HCS/AAA staff regarding training needs, specialized rates and incentives, contracting assistance, consultative services and other housing assistance.
- » Identify needed community housing supports for specific populations including people with personal care needs who also have Traumatic Brain Injury (TBI), bariatric issues, dementia, challenging behaviors or complex medical needs.
- » Assess HCS and AAA staff training needs regarding assisting individuals in locating affordable and accessible housing options.
- » Develop a continuing process for data analysis and reporting to advise executive management on strategic planning related to affordable and accessible housing.

Housing Support and Development

- » Work with a state level team to design a strategic approach to HCBS housing resource support and development across all DSHS regions including goals, objectives and continuous evaluation at both the state and regional level.
- » Coordinate with local housing authorities, non-profit and for-profit housing providers, and others to develop housing resources necessary for successful transition and community tenure of people leaving nursing facilities and other institutional settings.
- » In coordination with Training Curriculum Specialist and the HCS Training Coordination and Development unit, work with providers, HCS, AAA, RCS

field staff and advocacy groups to identify priority training needs for housing providers.

- » Stay current on national trends and innovations in community based housing options. Propose, coordinate and develop alternative models of community based living such as cluster care, housing with services and long term care supported living models.
- » Coordinate with low income housing resources, landlords, and corporations to expedite access to housing for homeless nursing facility eligible clients.
- » Provide education and information to community agencies, physicians, hospitals and stakeholders regarding diversionary housing resources for clients to prevent placement in institutional settings.
- » Serve on statewide workgroups to develop policies, procedures, and other improvements to housing programs. This includes preparing, developing, and providing training/presentations to program meetings.
- » Develop a continuing process for analysis and reporting on community housing development goals and objectives to executive management.
- » Participate in outreach and follow-up efforts, particularly with property managers, landlords, and housing developers.

KNOWLEDGE AND SKILLS REQUIRED:

- » Experience in the low-income housing and/or community services field.
- » Knowledge of home and community based services, home and community services and area agency on aging operations.
- » Understanding of programs, principles, regulations and statutes related to community based long term care.
- » Understanding of and commitment to the principles of person centered planning, consumer choice and self-direction.
- » Demonstrated ability to provide training and technical assistance.
- » Skills in community development and project planning.
- » Demonstrated ability to collect and analyze data from systems and make thoughtful recommendations that result in positive program changes.
- » Demonstrated ability to work in a multi-disciplinary team.
- » Excellent communication skills, ability to write and speak and concisely to partners and agencies, both public and private from diverse populations.

- » Demonstrated ability to develop positive working relationships with a broad range of entities.
- » Demonstrated ability to coordinate multiple activities and timelines.
- » Demonstrated ability to work independently, plan, organize, and produce quality deliverables in multiple assignments time frames.

Education: Bachelor's Degree in social work, health or social science, public administration or related field; preferred candidate will possess a Masters degree.

The candidate must have demonstrated knowledge of principles, practices and techniques in housing planning and development, including HUD rules and regulations.

In addition, the position will involve travel and candidate must have own transportation.

APPLICATION PROCESS:

Interested applicants should submit the following information to be considered for the position:

- » Letter of interest, describing specific qualifications and experiences as they relate to this position.
- » Current résumé detailing education and professional experiences, listing names of employers, dates of employment with details of responsibilities and accomplishments.
- » A minimum of three professional references with current telephone numbers.

Attachment F: Memo of Understanding

“Inter-Agency Partnership Agreement” for application to HUD Sec. 811 PRA Demonstration project funding, 2012, between: Washington State Department of Commerce, Washington State Housing Finance Commission, DSHS, and Washington State Health Care Authority

MEMORANDUM OF UNDERSTANDING

SECTION 811 INTER-AGENCY PARTNERSHIP AGREEMENT

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CSHD

This Memorandum of Understanding (MOU) has been created and entered into on June __, 2012, by and between the following parties in relation to their application for the U.S. Department of Housing and Urban Development (HUD) Section 811 Project Rental Assistance Demonstration funding for FY 2012.

Washington State Department of Commerce, Washington State Department of Social and Health Services, Washington State Housing Finance Commission, and Washington State Health Care Authority

Introduction and Goals

Recently enacted legislation updates and modernizes the U.S. Department of Housing and Urban Development Section 811 Supportive Housing for Persons with Disabilities program. It also provides a new opportunity for state HHS/Medicaid agencies to form Section 811 partnerships with State Housing Finance Agencies (HFAs), and other appropriate agencies to compete for new Section 811 Project Rental Assistance (PRA) demonstration funds.

In Washington State, the Department of Commerce (Commerce) is the State Housing Agency through which any PRA demonstration funds received should flow. Commerce invests public resources to create, preserve, and enhance safe and affordable housing for Washington residents. Commerce, in partnership with private lenders, non-profit organizations, local governments, other state agencies, and the federal government strategically invests in affordable housing opportunities to benefit the maximum number of households that these resources will support. Low-income individuals and families, farm workers, disabled, elderly, and other persons with special needs benefit from Commerce's housing services programs. In addition, Commerce contributes to a vital state-wide safety net of emergency shelters and transitional housing programs for homeless families and individuals, and oversees the Housing Trust Fund (HTF). The HTF, established in 1987, is funded through Washington State's capital budget, and since its inception has received \$710 million. The HTF helps Washington communities meet the housing needs of low-income and special needs populations. The HTF provides funds to:

- Support the construction, acquisition or rehabilitation of affordable housing
- Create rental and/or homeownership opportunities for low-income households, and
- Provide housing for clients of the State's social and health programs and services.

The Washington State Department of Social and Health Services (DSHS) is the human services agency responsible for providing long-term care services -- including mainstream supports (Medicaid) and state-funded services through its Aging and Disability Services Administration (ADSA) for disabled individuals and families in need, including non-elderly disabled individuals who could benefit from the Section 811 PRA

demonstration subsidies. In 2007, DSHS was awarded a "Money Follows the Person" (MFP) grant from the Federal Centers for Medicare and Medicaid Services (CMS) for its "Roads to Community Living" (RCL) demonstration project. The purpose of the RCL project is to examine how best to successfully help people with complex, long-term care needs (disabilities) transition from institutional settings into community-based living environments. Additionally, DSHS partnered with several public housing authorities (PHAs) across Washington to apply for the tenant based non-elderly, disabled housing choice vouchers (NED2) for people discharging from institutional settings. As a result of this strong collaboration, five Washington PHAs received a total of 215 NED2 housing choice vouchers in February 2011. All of Washington's NED2 vouchers were issued to eligible non-elderly, disabled ADOSA clients by May, 2012. At this time, a client referral and waitlist protocol for NED2 housing choice vouchers has been established between DSHS and the five public housing authorities, which can be replicated with the PRA demonstration subsidies for disabled set-aside units in multifamily housing projects.

The Washington State Housing Finance Commission (the Commission) is the state housing finance agency for the state of Washington. Through the allocation of the federal Housing Tax Credit and the issuance of Multifamily Tax-Exempt bonds, the Commission has helped finance a spectrum of affordable multifamily housing statewide, with properties serving a variety of housing and income needs in nearly every county. Since 1987, the Commission has awarded over \$3.18 billion in federal Housing Tax Credits to project sponsors creating over 61,000 units serving very low and extremely low income residents. The Commission has had a long standing policy priority for setting aside affordable housing to serve disabled populations and has created nearly 8,000 of these units. Many of these properties have also been financed in coordination with the Housing Trust Fund.

The Washington State Health Care Authority (HCA) is the State Medicaid agency which oversees health care programs in the State and collaborates with DSHS in the provision of Medicaid services to eligible people.

The Americans with Disabilities Act (ADA), as interpreted by the U.S. Supreme Court's *Olmstead* decision, requires public entities such as state agencies to administer services, programs (including housing), and activities in the most integrated community-based settings appropriate to meet the needs of individuals with disabilities. Washington State's Section 811 Inter-Agency Partnership Agreement will foster strategies to create integrated community-based housing opportunities for people with long-term disability care needs, and offer them available services necessary to remain successfully housed.

Our goal is to build upon Washington State's pipeline of affordable multifamily housing units by expanding the inventory of disabled set-aside units available to non-elderly, disabled households at or below 30% AMI (extremely low-income), and receiving Medicaid.

MEMORANDUM OF UNDERSTANDING

SECTION 811 INTER-AGENCY PARTNERSHIP AGREEMENT

- I. The parties to this MOU agree to work together to ensure that Section 811 project rental assistance demonstration subsidies funded through HUD's 2012 Section 811 NOFA are coordinated for eligible individuals and households with access to appropriate voluntary and elective supportive services.
- II. Furthermore, the parties to this MOU agree to comply with their responsibilities and actions as specified below.

1 Washington State Department of Commerce (Commerce):

1.1 NOFA Application and Project Development

1.1.1 Commerce will be the lead applicant and will be responsible for submitting the HUD Fiscal Year 2012 Section 811 Project Rental Assistance Demonstration program application.

1.1.2 Commerce will work collaboratively with DSHS, the Commission, and HCA to create an identification and selection process of existing and upcoming affordable multifamily housing properties that are applicable and appropriate to receive PRA demonstration subsidies.

1.1.3 Commerce will cooperate with HUD and other federal entities in the reporting and evaluation of the Section 811 PRA demonstration program.

1.2 Outreach and Coordination with Developers/Owners of Multifamily Housing Units

1.2.1 Commerce will conduct a survey of approximately 350 organizations of housing projects financed with tax-credits through the Washington State Housing Finance Commission or through Commerce's Housing Trust Fund to ascertain which multifamily housing projects would be appropriate (those with capacity to allocate up to 25% of their project units for disabled households), and interested in working with the Section 811 partner agencies to receive the PRA demonstration subsidies.

1.2.2 Commerce will commit awarded PRA demonstration funds through one or more public housing authorities, community action councils, local governments or third party contractors to administer and oversee Rental Assistance Contracts with owners of multifamily properties, and will administer the funds in accordance with the 2012 NOFA guidelines for the Section 811 PRA demonstration program.

2 Washington State Department of Social and Health Services (DSHS):

2.1 NOFA Application and Project Development

2.1.1 DSHS will assist Commerce with the 2012 NOFA for the Section 811 PRA Demonstration application submittal and project development, as requested.

2.1.2 DSHS will work collaboratively with Commerce and the Commission to create an identification and selection process for affordable multifamily housing properties that are appropriate to receive PRA demonstration subsidies.

2.1.3 DSHS will cooperate with HUD and other federal entities in the reporting and evaluation of the Section 811 PRA demonstration program.

2.2 Target Population

2.2.1 All individuals/households served through the 2012 Section 811 NOFA will be non-elderly (18 to 61 years of age), disabled, and receive or be eligible to receive services and supports provided through DSHS Aging and Disabilities Services Administration (ADSA). The target population shall include eligible individuals:

- Enrolled in the Roads to Community Living (MFP) Project
- With developmental disabilities
- With functional or cognitive disabilities
- With mental illnesses or co-occurring disorders

2.2.2 Individuals/households will have incomes at or below 30% AMI (extremely low-income), and receive, or be eligible to receive Medicaid.

2.3 Outreach and Referral

2.3.1 ADSA social workers and case managers will identify, screen, and assess clients within their caseloads currently residing in institutional settings as well as those in home and community based residential settings for interest/desire to relocate into multifamily housing units.

2.3.2 ADSA social workers and case managers will inform (educate) clients and family members and supportive services entities of clients rights to decide where they will live, and support/maximize client independence and self-direction whenever possible.

2.3.3 ADSA social workers and case managers will refer clients and work collaboratively with Housing Program Managers and eligible owners/landlords of multifamily housing projects to lease up vacant disabled housing units with clients discharging from institutional settings or other home and community based residential settings.

2.4 Supportive Services

2.4.1 ADSA staff will perform face-to-face assessments with referred clients to determine service needs and program eligibility, and provide client-centered services with an over-

arching goal of preventing unnecessary institutionalization. This will include individuals meeting the eligibility criteria for the Roads to Community Living (MFP) demonstration project.

2.4.2 ADSA will offer eligible individuals supportive services to assist the target population toward their goal of successful transition into integrated community placement settings.

2.4.3 ADSA services will be tailored to individual client need based upon a level-of-care assessment, and are subject to program availability. Supportive services are non-mandatory for project participation.

3 Washington State Housing Finance Commission (the Commission)*:

***Supportive Role**

3.1 The Commission shall play a supportive role by participating in ongoing meetings and dialogue with Commerce and DSHS to strategize processes for the expansion and availability of affordable multifamily housing units for non-elderly disabled households.

3.2 NOFA Application and Project Development

3.2.1 The Commission will assist Commerce and DSHS with the 2012 NOFA for the Section 811 PRA Demonstration program application submittal and project development, as requested.

3.2.2 The Commission shall work collaboratively with Commerce and DSHS to create an identification and selection process for affordable multifamily housing properties that are appropriate and applicable to receive PRA demonstration subsidies through the 2012 Section 811 NOFA.

4 Washington State Health Care Authority (HCA)*:

***Supportive role**

4.1 HCA fully supports the Section 811 Inter-Agency Partnership Agreement between Commerce, DSHS, and the Commission, and supports the development and submittal of a state-wide application for the HUD FY 2012 Section 811 Project Rental Assistance Demonstration program, benefiting extremely low-income, non-elderly, disabled individuals and households.

4.2 HCA agrees to the responsibilities and actions outlined above and will sign this MOU as the State Medicaid agency.

Signature Page

Washington State Department of Commerce (Commerce)

Name: Dan McConnon

Title: Deputy Director

Dan McConnon

Signature

Date: 7/11/12

Washington State Department of Social and Health Services (DSHS)

Name: Robin Arnold Williams

Title: Secretary

Robin Arnold Williams

Signature

Date: 7/18/12

Washington State Housing Finance Commission (the Commission)

Name: Kim Herman

Title: Exec. Director

Kim Herman

Signature

Date: 6/19/2012

Washington State Health Care Authority (HCA)

Name: DOUG POTER

Title: DIRECTOR

Doug Potter

Signature

Date: 7-20-12