

ACCESS TO HOUSING

RENTAL HOUSING COUNSELING

Strategy Description

The minimum grant amount under this strategy is \$50,000, which includes a maximum 15% administrative cost allowance. This service strategy will support individual counseling and group workshops that prepare and connect residents to rental housing opportunities, especially MOHCD's Below Market Rate (BMR) and Affordable Rental opportunities. Grantees are expected to work closely with a MOHCD-identified, non-client serving lead agency to coordinate marketing, outreach and programmatic activities that respond to the evolving needs of target populations and the rapidly shifting housing market. Applicants interested in providing these rental housing counseling coordination activities should read the description of activities starting on page 128.

Client-serving applicants can either propose to provide clients with basic application assistance, housing case management services, or a combination of both. Basic application assistance means teaching applicants about how affordable housing works, providing resources to assist in their housing search, and assisting them to open a DAHLIA account. Basic assistance can be done in a group setting or one-on-one with the client. To receive the minimum grant amount to provide basic application assistance, an agency must annually serve 200 clients and host 5 workshops.

Housing case management services mean assisting clients with every aspect of their housing search on an individual basis, including repairing credit, working with the leasing agent, and following up with the client or other stakeholders to achieve positive outcomes. To receive the minimum grant amount to provide housing case management services, an agency must annually serve 100 clients and host 5 workshops.

Housing Counseling Plan

All grantees under this strategy must have a current, up-to-date Housing Counseling Plan that explains the needs and problems of its target population, how the agency will address one or more of these needs and problems with its available resources, the type of housing counseling services offered, marketing and outreach strategies, fee structure (if applicable), and its geographic service area. The Plan must describe how the agency serves residents with limited English proficiency (LEP).

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Strategy Description (continued)

In addition to any LEP target population agencies may serve, they must also seek to provide access to program benefits and information to LEP individuals whose primary language is one of the City's official languages (Chinese, Spanish, and Filipino) through either "in-house" language assistance services or by contracting with a vendor to provide such services. Additionally, the Plan must address how the agency will serve people with mobility and communication needs and provide alternative settings or formats for the provision of housing counseling services, such as telephonic counseling or remote counseling systems designed using Skype technology, video cameras and the internet.

Client Intake

All applicants must have a standardized, written client intake process, where a housing counselor or administrative staff person trained in requirements of the Privacy Act obtains basic information in a standardized format to determine how the agency can assist a potential client, sign them up for group education, schedule an appointment with a housing counselor, or refer the potential client to other resources. Client intake may occur at a one-on-one session or at drop-in clinics. An applicant's client intake policy and procedure should include how the agency handles (and protects) private personal information, language barriers, and sensitive questions regarding gender and/or sexual orientation, proper pronouns, and other issues during intake.

Counselor Training

All housing counselors must receive standardized training in housing counseling and MOHCD programs. Counselors should exhibit a professional communication skill set, including listening skills, customer service and cultural competency and humility. Housing counselors conducting application assistance activities must attend one MOHCD sponsored training per year and participate in train-the-trainer opportunities offered by a coordinating agency, as determined by MOHCD. In addition to two annual program trainings offered by MOHCD, rental housing counselors conducting case management shall obtain a minimum of 20 hours of facilitated rental counseling instruction within their first year and a minimum of 6 hours continuing education every year thereafter.

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Facilitated rental housing counseling training is offered online and in person through agencies such as NeighborWorks America, HUD, and UnidosUS. At a minimum, curriculum covered by facilitated rental housing training should include fundamentals such as tenancy (e.g., common lease language, breaking a lease, non-renewal and evictions), Fair Housing laws and regulations, how to avoid scams, financial management and credit repair, and tenant rights.

In your proposal:

- Describe your counselor training process, including source of facilitated training and number of hours, your continuing education policy and number of hours, process for onboarding new counselors, and your method for evaluating counselor knowledge and performance.

Individual Counseling

If you choose to provide basic application assistance only, you have the option to provide either one-on-one assistance, group workshops, or both. If you choose to provide housing case management services, you must offer individual, one-on-one sessions to clients. All applicants providing individual, one-on-one sessions must use private counseling rooms.

If you choose to provide one-on-one basic application assistance, counselors must be prepared to offer the following services and information to clients:

- Assisting with opening a DAHLIA account, including basic digital literacy explanations;
- Reviewing current availability of rental units and teaching how to apply for affordable housing opportunities;
- Explanation of the different rental programs offered in San Francisco, including nonprofit-owned 100% affordable rentals and waitlists and Inclusionary Housing and Below Market Rate rentals;

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Strategy Description (continued)

- Explanation of the Home Match Program;
- Referrals for Eviction Prevention and Housing Stabilization services;
- Lottery Preference Program eligibility and application;
- Housing eligibility (e.g., income and asset calculation, household size, credit, criminal background, and the Fair Chance Ordinance);
- Process for appealing denials for housing; and
- Fair Housing laws and regulations.

If you choose to provide housing case management services, initial and subsequent counseling sessions must result in a written housing action plan (with housing goals) for each client. The action plan outlines what the agency and the client will do in order to meet the client's housing goals and, when appropriate, address the client's housing problem(s). The action plan is an assessment of a client's current ability to find and maintain rental housing. It is a mutual agreement between the client and the housing counselor to work on the short-term, medium-term and/or long-term goals necessary for the client to find and maintain rental housing.

If you choose to provide housing case management services, during individual counseling sessions and based on the unique goals outlined in the client's action plan, counselors must be prepared to offer the following services and information to clients:

- Assisting with opening a DAHLIA account, including basic digital literacy explanations;
- Reviewing current availability of rental units and teaching how to apply for affordable housing opportunities;
- Documenting household income and expenses, and developing a budget;
- Analyzing a client's spending habits, financial circumstances and credit report;
- Making recommendations for debt management and savings plans;
- Determining the maximum sustainable rent payment;
- Determining housing program eligibility (e.g., income and asset calculation, household size, and credit);

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- Reviewing local, state and federal rental assistance programs;
- Assisting with a housing search for rental units outside of DAHLIA;
- Lease-up process assistance (e.g., rental application and documents, lease signing, house rules and lease addendum review, parking policies, selection process for shared housing, and ensuring language access throughout the lease up process); and
- Timely assistance with appeals under the Fair Chance Ordinance and all other denials for housing.

In your proposal:

- Describe how your agency works with clients to identify goals. Describe how your agency identifies available rental units, including location and transportation access. Describe what methodology your agency uses to calculate a client's maximum sustainable rent payment. Describe your agencies internal system for responding to client requests for application denial appeal requests. Agencies providing rental case management services must respond to referrals from a MOHCD-identified coordinating agency.

Group Workshops

If you choose to provide basic application assistance only, you have the option to provide either group workshops, one-on-one assistance, or both. If you choose to provide housing case management services, you must offer group workshops and/or drop-in rental housing "clinics" to clients. All applicants providing group workshops and/or drop-in rental housing "clinics" shall describe their outreach and marketing plan for group education including notification and coordination of rental workshops to a MOHCD identified, non-client serving agency who will maintain a San Francisco rental housing assistance workshop calendar. Group workshops should follow a written agenda and curriculum. MOHCD will provide a template which may be modified and further developed by the agency.

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Strategy Description (continued)

Housing counselors must review and explain the following topics during workshops:

- Basic affordable housing eligibility;
- Introduction to DAHLIA and the lottery system;
- The types of San Francisco housing available (e.g., rent-controlled, 100% affordable, BMR etc.) and the similarities and differences;
- Fair housing law and discrimination (as it applies to rental housing);
- Major parts of a lease and resultant liability for breaking a lease;
- Tenant and landlord rights and responsibilities;
- The importance of rental insurance;
- How eviction affects future rental opportunities;
- Eviction prevention services available through the Tenant Right to Counsel Initiative; and
- Where to find services for the homeless.

Client Follow-Up and Evaluation

All applicants must use a client file checklist to ensure required documentation has been received and retained. Client records must be maintained for at least three years following the client's termination of counseling. All client files must be stored in secure physical or digital formats.

All applicants must have a written client follow-up and evaluation process that includes how often they follow up, how they document a client's termination of counseling, how they document client outcomes, and how client satisfaction surveys are used to evaluate the effectiveness of services.

Rental Housing Counseling Coordination

The role of the Rental Housing Counseling Coordinating Agency is key to providing consistent standardized basic application assistance and housing case management services across San Francisco. The maximum grant amount for this activity is \$200,000, which includes a maximum 15% administrative cost allowance.

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Strategy Description (continued)

Applicants will focus on coordination and support of agencies providing direct service to residents and must be prepared to offer all the following services:

- Provide resource materials to housing counseling agencies including basic digital literacy information and other relevant topics;
- Provide communication and information to housing counseling service providers on counselor training opportunities, program updates, upcoming rental opportunities, and industry standards;
- Maintain and publish a monthly calendar of all housing counseling agency workshops and drop-in clinics;
- Provide and track client referrals to housing counseling agencies;
- Coordinate and execute targeted outreach activities to serve the rental housing needs of San Francisco Unified School District (SFUSD) employees;
- Provide and track referrals to housing counseling agencies providing case management services to ensure that clients needing assistance with appeals under the Fair Chance Ordinance and all other denials for housing receive timely assistance;
- Provide language access materials and equipment to housing counseling agencies;
- Provide a quarterly newsletter that keeps MOHCD Inclusionary BMR renters informed of resources and other information effecting their tenancy;
- Lead and coordinate affordable rental housing related workshops, on-site counseling and assistance, and exhibitors for annual San Francisco Housing Expo;
- Meet monthly with MOHCD staff to ensure alignment with MOHCD programs and initiatives, and disseminate information to housing counseling agencies.

In your proposal:

- Describe how your agency will work with housing counseling agencies to provide these services. Describe how your agency will refer and track all referrals made. Describe outreach activities your agency will conduct in support of the Rental Housing Counseling agencies, including targeted outreach to MOHCD's target populations. Describe your agency's internal system for responding to client requests for referrals.

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Key Metrics

Whether your agency will provide Basic Application Assistance or Housing Case Management Services, you must meet the following minimum programmatic outcomes:

Outcome Metrics
of residents demonstrating increased ability to navigate the rental housing process
of workshops marketed in collaboration with the MOHCD-identified coordinating agency
of qualified residents applying for at least one housing opportunity through DAHLIA
of residents creating an account on DAHLIA
of workshops and basic application assistance clients served in a language other than English
of San Francisco Unified School District (SFUSD) employees served

If your agency will provide Housing Case Management Services, you must also meet the following minimum programmatic outcomes:

of residents successfully addressing or removing one or more barriers identified through their Housing Action Plan
of residents qualifying for at least one housing opportunity
of residents successfully leasing up
of residents who receive assistance with an appeal of the denial of rental housing

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Key Metrics (continued)

If your agency will provide Rental Housing Counseling Coordination, you must meet the following minimum programmatic outcomes:

Outcome Metrics
of referrals made to housing counseling agencies
of drop-in clinics scheduled with agencies
of rental workshops scheduled with agencies (including workshops targeted to SFUSD educators)
of trainings provided to housing counseling agencies

For any of the minimum programmatic outcomes listed, you can always expand on these, or offer additional measures of success in your proposal.

Applicant Qualifications

If your agency will provide Rental Housing Counseling, it must:

- Adopt and follow the National Industry Standards for Rental Education and Counseling;
- Have a Housing Counseling Plan by July 1, 2020 that outlines its policies and procedures for client intake, counselor training, individual counseling sessions, group workshops, and client follow-up and evaluation; and
- Be willing to enter into a written agreement with a MOHCD-identified coordinating agency for rental workshop and case management coordination.

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Applicant Qualifications (continued)

If your agency will provide Rental Housing Counseling Coordination, it must:

- Not provide direct services to clients; and
- Be willing to enter into a written agreement with all Rental Housing Counseling service providers for rental workshop and case management coordination.

