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From:

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EA Self-Sufficiency Plan - Phase II

Introduction

Emergency Assistance (EA) policy states an EA assistance unit (AU) placed in temporary emergency shelter must cooperate in the development of and participate in the activities outlined in the EA AU's plan for self-sufficiency (106 CMR 309.040(D)(1)).

EA policy also states an EA AU will be considered noncompliant with the requirement for maintaining temporary emergency shelter if it fails to cooperate in developing or participating in the activities required by the plan for self-sufficiency (106 CMR 309.040(E)(1)(c)).

The EA AU's plan for self-sufficiency is being developed in two steps:

Field Operations Memo 2001-23 issued the procedures for completing the agreement, the **EA Self-Sufficiency Plan / Agreement - Phase I** (EA-15), with each adult member (age 18 and older) in the EA AU applying for or already receiving temporary emergency shelter benefits, and

This Field Operations Memo issues the procedures for scheduling and completing the plan for self-sufficiency, the **EA Self-Sufficiency Plan - Phase II** (EA-Plan/PT 1, PT 2 and PT 3) (Attachment A) with each adult member (age 18 and older) in the EA AU receiving temporary emergency shelter benefits.

**Plan for
Self-Sufficiency**

Each EA AU placed in temporary emergency shelter, whether the placement be in a congregate family shelter, a scattered site shelter or an interim placement in a hotel/motel, will have a Plan for Self-Sufficiency.

The plan for self-sufficiency outlines the steps the EA AU must take to achieve self-sufficiency and find permanent housing. Self-sufficiency means not only being able to leave temporary emergency shelter for safe, permanent housing but having the financial means to obtain and maintain such housing. EA AUs have unique dynamics and therefore will require different activities to secure permanent housing.

The AU Manager or Homeless Coordinator must explain to the EA AU that if an adult member of the EA AU fails to cooperate with the development of the EA Self-Sufficiency Plan, including signing any of the three parts of the EA-Plan form, or fails to comply with the activities in any of the three parts of the EA Self-Sufficiency Plan, the EA AU will be in noncompliance with the EA rules.

Whenever possible, the plan should be developed during a joint meeting with the adult members of the EA AU, the AU Manager or the Homeless Coordinator, a shelter case manager, and the HAP provider.

If the placement is in an hotel/motel, the plan will be developed with the adult members of the EA AU, the AU Manager or the Homeless Coordinator and the HAP provider. The shelter part of the EA-Plan (Part 3) will not be completed at this time but the HAP part (Part 2) and the AU Manager's part (Part 1) will be completed. When the EA AU is transferred to a family or scattered site shelter, Part 3 is completed.

When it is not possible for all to meet together, the EA AU's self-sufficiency plan will be framed with input from the AU Manager or the Homeless Coordinator (Part 1), the HAP provider (Part 2) and the shelter case manager (Part 3) after each has met with the adult members of the EA AU and discussed the activities that will be included.

Priority AUs

The following AUs should be considered priority when scheduling appointments with the current EA AUs placed in temporary emergency shelters (congregate, scattered site or hotel/motel) to complete the EA Self-Sufficiency Plan - Phase II (EA-Plan). An EA-Plan should be completed for each EA AU as soon as possible. The TAO Director or designee should prioritize the completion the EA-Plans.

Priority EA AUs are based on the following:

1. An EA AU currently placed in a hotel/motel;
2. An EA AU currently placed in a scattered site;
3. A two-parent EA AU;
4. An EA AU having used 18 or more months of TAFDC time-limited benefits;
5. EA AUs that have been homeless and residing in shelter(s) for the longest length of time; or
6. As determined by the AU Manager or Homeless Coordinator and Supervisor.

As families are placed in temporary emergency shelters, they become part of your total EA AU population needing a plan for self-sufficiency.

TAO Time/Staff Limitations

Each TAO is unique in its number of homeless families in shelter and the number of staff assigned to the EA AUs. Therefore, the priority AUs mentioned in this memo are guidelines for the TAO Director or designee to use for ensuring timely completion of the self-sufficiency plan.

The Director or designee and Supervisor should discuss the most practical approach to completing the self-sufficiency plans. Some TAOs may find it practical for one or more AU Managers or Homeless Coordinators to go to the shelters for the joint meeting to develop the EA-Plan for the EA AU, while others may prefer meeting at the TAO or separately completing the parts of the EA-Plan form, with the AU Manager or Homeless Coordinator coordinating the three parts of the EA-Plan.

**AU Manager
Responsibilities-
Part 1**

The AU Manager or Homeless Coordinator schedules the appointment with all parties to develop the self-sufficiency plan, either:

within seven to 10 days after the placement or as appropriate taking into consideration the family situation, if the AU is not being transferred to another TAO; or
within seven to 10 days after receipt of the AU record(s) by the new TAO or as appropriate taking into consideration the family situation.

The EA Self-Sufficiency Plan may be completed during a joint meeting of the EA AU, the HAP and shelter providers and the AU Manager or Homeless Coordinator.

If a joint meeting is not possible, the AU Manager or Homeless Coordinator will:

- meet with the EA AU to complete Part 1 of the EA Self-Sufficiency Plan - Phase II (EA-Plan) to identify the activities the EA AU is currently involved in, such as, work, work program requirement activities, ESP component activities or job search activities and the hours needed for participation. This gives the shelter case manager and the HAP provider information about the hours already committed to by the EA AU;

fax the completed Part 1 of the EA-Plan to both the HAP provider and to the shelter (some shelters have a HAP provider on site). Part 1 is never faxed to a hotel/motel. When transferred from the hotel/motel to a shelter, fax Part 1 to the shelter;

maintain a copy of Part 1 for tracking the timely response(s) from the shelter and HAP provider;

file Part 1 in the AU record;

- monitor, assess and document the EA AU's compliance with the job or job-related activities in Part 1 of the plan. Noncooperation with activities in the plan for self-sufficiency is noncompliance with shelter requirements;

amend Part 1 of the EA-Plan as activities are completed and new activities are added; and

schedule and attend case conferences or other meetings with the HAP and shelter providers.

**HAP Provider
Responsibilities-
Part 2**

Upon receipt of Part 1, the HAP provider will complete Part 2 of the EA-Plan as soon as possible but no longer than 30 days. The HAP provider should have a supply of blank EA-Plan/Part 2s. If requested, the TAO will provide additional blank copies to the HAP provider.

The HAP provider will:

meet with the EA AU to develop a comprehensive housing plan and complete Part 2 of the EA-Plan. This housing plan will identify what activities the EA AU must do to obtain and keep permanent housing. If the EA AU is in shelter, the housing plan will become part of the EA Self-Sufficiency Plan - Phase II (EA-Plan). The number of hours per week the EA AU must spend doing housing search will take into consideration the number of hours and which days the EA AU is required to work, do work program requirements, do ESP education or training activities, or do job search activities.

Generally, doing housing search activities will be a full-time effort for the adult members of the EA AU. When not a full-time effort, the adult members should be spending no less than 10 hours over a seven-day period doing active housing search activities;

once Part 2 has been completed and signed, fax it to the AU Manager or Homeless Coordinator;

fax Part 2 to the AU Manager or Homeless Coordinator if the EA AU fails or refuses to develop the plan or participate in the housing activities in the plan. "Refused to sign" or "refused to cooperate" should be indicated on the line for the recipient's or other adult's signature or a brief description of what transpired will be written. Noncooperation is noncompliance with shelter requirements;

monitor, assess and document the EA AU's progress in the housing activities in Part 2 of the plan;

maintain at least monthly contact with the AU Manager or Homeless Coordinator to report on the family's compliance with the HAP services. This contact may be a written or verbal report, depending on the family circumstances;

amend Part 2 of the EA-Plan as activities are completed and new activities are added, or complete a separate Part 2 page to indicate a new activity, an activity completed or a goal reached;

**HAP Provider
Responsibilities-
Part 2
(continued)**

-
- fax the amended or new Part 2 to the AU Manager or Homeless Coordinator;

report on the EA AU's progress or barriers to implementing the self-sufficiency activities; and

attend case conferences or other meetings deemed necessary by the AU Manager or Homeless Coordinator.

**Shelter
Responsibilities-
Part 3**

Upon receipt of Part 1, the congregate family shelter or scattered site shelter provider will complete Part 3 of the EA-Plan as soon as possible but no longer than 30 days. The shelter provider should have a supply of blank EA-Plan/Part 3s. As requested, the TAO will provide additional copies to the shelter provider.

The shelter provider will:

meet with the EA AU to discuss the activities that will help the EA AU in its efforts for self-sufficiency, such as starting a savings plan, scheduling appointments, registering children in school, etc. These activities will be listed in Part 3 of the EA-Plan;

once Part 3 has been completed and signed, fax it to the AU Manager or Homeless Coordinator;

fax Part 3 to the AU Manager or Homeless Coordinator if the EA AU fails or refuses to develop the plan or participate in the activities in the plan. "Refused to sign" or "refused to cooperate" should be indicated on the line for the recipient's or other adult's signature or a brief description of what transpired will be written. Noncooperation is noncompliance with shelter requirements;

monitor, assess and document the EA AU's progress in implementing the activities in Part 3 of the plan;

maintain at least monthly contact with the AU Manager or Homeless Coordinator to report on the family's compliance with the activities. This contact may be a written or verbal report, depending on the family circumstances;

amend Part 3 of the EA-Plan as activities are completed and new activities are added, or complete a separate Part 3 page to indicate a new activity, an activity completed or a goal reached;

fax the amended or new Part 3 to the AU Manager or Homeless Coordinator;

report on the EA AU's progress or barriers to implementing the self-sufficiency activities; and

attend case conferences or other meetings deemed necessary by the AU Manager or Homeless Coordinator.

**Combining
Three Parts of
the Plan for
Self-Sufficiency**

Once Part 2 and Part 3 have been completed and faxed/given to the AU Manager or Homeless Coordinator, the AU Manager or Homeless Coordinator will:

combine Part 1, Part 2 and Part 3 into one EA-Plan;

fax/give the EA-Plan to the EA AU, the shelter and the HAP provider;

file the original EA-Plan in the AU record. The shelter and HAP provider will monitor the EA AU's compliance for their particular part of the plan for self-sufficiency;

if an amended Part 2 or 3 is received from the HAP or shelter providers, make sure it is inserted into the AU record copy of the EA-Plan and then faxed/given to the EA AU, the HAP provider and the shelter provider. It is important that all parties are aware of the current activities the EA AU is responsible for doing; and

file the most recent copy of the EA AU's EA-Plan in the AU record.

**EA Reference
Guide**

An update to the *EA Reference Guide* will soon be issued with these procedures for completing the EA Self-Sufficiency Plan plus a description of what the HAP and shelter providers do for the EA AU.

Questions

If you have any questions, please have your Hotline designee call the Policy Hotline at 617-348-8478.



EA Self-Sufficiency Plan - Phase II - Part I

EA Family Name _____

TAO _____

Date _____

Recipient Name _____

SSN _____

Other Adult Name _____

SSN _____

Another Adult Name _____

SSN _____

Shelter Name _____

Shelter Address _____

Your Self-Sufficiency Plan outlines the specific activities to be done by the adult members of the EA family to help you achieve self-sufficiency and find permanent housing. This Plan is being developed with the staff from the agencies who are working with you to help you get permanent housing. The activities in your Self-Sufficiency Plan will change as you move closer to obtaining permanent housing. As you complete an activity or achieve a particular goal, the Plan will be changed to include new activities until you reach your final goal of finding housing.

Part 1: to be completed by the AU Manager or Homeless Coordinator and the adult members of the EA AU.

Member Name _____

The following activities will be part of your Self-Sufficiency Plan. If you do not do the activities written in this Self-Sufficiency Plan, you will be in noncompliance with the rules for receiving shelter benefits and you may lose your EA shelter benefits.

Completed Dates

Go to your job for _____ hours a week.

Complete the work program activities for _____ hours a week.

Participate in an education or training program for _____ hours a week.

Go to a job search program for _____ hours a week. _____

Register for a training or education program

Other _____

Other _____

EA Self-Sufficiency Plan - Phase II - Part 1

EA Family Name _____

Other Member Name _____

The following activities will be part of your Self-Sufficiency Plan. **If you do not do the activities written in this Self-Sufficiency Plan, you will be in noncompliance with the rules for receiving shelter benefits and you may lose your EA shelter benefits.**

Completed Dates

Go to your job for _____ hours a week.

Complete the work program activities for _____ hours a week.

Participate in an education or training program for _____ hours a week.

Go to a job search program for _____ hours a week.

Register for a training or education program.

Other _____

Other _____

I(we) understand that the activities listed above must be completed by me (us) for our temporary emergency shelter benefits to continue.

Recipient Signature

Date

Other Adult Signature

Date

AU Manager or Homeless Coordinator Signature

Date

Print AU Manager or Homeless Coordinator Name Telephone



EA Self-Sufficiency Plan - Phase II - Part 2

EA Family Name _____

Part 2: to be completed by the HAP Provider and the adult members of the EA AU.

The following housing search activities will be part of your family's Self-Sufficiency Plan. You and the adult members of your family must do housing search for _____ hours each week. If you do not do the activities written in this Self-Sufficiency Plan, you will be in noncompliance with the rules for receiving shelter benefits and you may lose your EA shelter benefits.

Family Size _____ # of Adults _____ # of Boys _____ # of Girls _____
Subsidy Status Y - N; Expires ___/___/___ Applied ___/___/___
Extension Y - N Expires _____

ACTIVITIES

Completed/Date

Meet weekly and cooperate with the HAP provider to discuss your housing search progress. Y - N

Actions to correct a CORI report, credit issues or legal issues:

_____ Y - N
Y - N
Y - N

Attend group housing meetings on _____ Y - N

Attend mandatory workshops on _____ Y - N

Special activities or meetings, such as group trips, special housing meetings, etc.

_____ Y - N
Y - N
Y - N

You must bring with you the following:
 check for \$ _____ landlord's reference CORI Other

SUBSIDIZED HOUSING ACTIVITIES

Complete the applications for subsidized housing listed on the SUBSIDIZED HOUSING CHART by _____ and keep records. Y - N

UNSUBSIDIZED HOUSING ACTIVITIES

Contact the landlord or management agencies listed on the UNSUBSIDIZED HOUSING CHART by _____ and keep records. Y - N

Look for rental vacancies in newspapers, keep the rental ad as proof and add the information on the UNSUBSIDIZED HOUSING CHART. Y - N

Fax the completed Part 2 to the AU Manager or Homeless Coordinator as soon as all signatures are obtained. Attach any separate housing plan.

EA Self-Sufficiency Plan - Phase II - Part 2

EA Family Name _____

ADDITIONALACTIVITIES

_____	Y - N	_____
_____	Y - N	_____
_____	Y - N	_____
_____	Y - N	_____
_____	Y - N	_____
_____	Y - N	_____

HAP RESOURCES

I (we) understand that the activities listed on these pages must be completed by me (us) for our temporary emergency shelter benefits to continue.

Recipient Signature Date

Other Adult Signature Date

HAP Provider - HAP Contact Person Signature Telephone Number Date

EA Self-Sufficiency Plan - Phase II - Part 2 (cont)

EA Family Name _____

Week ending _____

SUBSIDIZED HOUSING SEARCH

Landlord/Realtor Name/ Telephone Number	Today's Date	Unit Address/ Rent Amount	Reason not taken	Verifications needed	Outcome

Application Follow-up Activities

Verification Submitted and Date	Call Landlord and Date	Contact Person	Outcome	HAP Intervention

Comments

EA Self-Sufficiency Plan - Phase II - Part 2 (cont)

EA Family Name _____

Week ending _____

UNSUBSIDIZED HOUSING SEARCH

Landlord/Realtor Name/ Telephone Number	Today's Date	Unit Address/ Rent Amount	Reason not taken	Verifications needed	Outcome

Application Follow-up Activities

Verification Submitted and Date	Call Landlord and Date	Contact Person	Outcome	HAP Intervention

Comments



EA Self-Sufficiency Plan - Phase II - Part 3

EA Family Name _____

Part 3: to be completed by the shelter case manager and the adult members of the EA AU.

During the month of _____, the following activities will be part of your Self-Sufficiency Plan. If you do not do the activities written in this Self-Sufficiency Plan, or do not follow the rules of the shelter, you will be in noncompliance with the rules for receiving shelter benefits and you may lose your EA shelter benefits.

ACTIVITIES

Completed/Date

Register your child(ren) for school. Y - N

Make an appointment with the doctor, social worker or other agency
specific _____ Y - N
_____ Y - N
_____ Y - N

Keep your appointment with doctor, social worker or other agency
specific _____ Y - N
_____ Y - N
_____ Y - N

Start a savings plan at a local financial institution agreeing to save
\$ _____ by ____ / ____ / _____. This savings plan is to meet future
housing expenses or past housing debts that need to be cleared up so you can get
permanent housing. Past debts include _____

Other _____ Y - N

Other _____ Y - N

I (we) understand that the activities listed above must be completed by me (us) for our temporary emergency shelter benefits to continue.

Recipient Signature Date

Other Adult Signature Date

Shelter Case Manager Signature Telephone Number Date

Amendments Date

Initials

**Fax the completed Part 3 to the AU Manager or Homeless Coordinator
as soon as all signatures are obtained.**

