FAMILY SELF-SUFFICIENCY & YOU

AN INTRODUCTION TO IMPLEMENTATION STRATEGIES

DHA
Housing Solutions for North Texas

What is the FSS Program?

- Voluntary commitment by HCV families to achieve personal goals and economic independence
- DHA provides on-going case management and support to help achieve your goals
- DHA offers a financial incentive upon program completion



FSS Phases

Selection and Eligibility → Orientation → Initial meeting with client → Quarterly contacts → Escrow → Resources / PCC



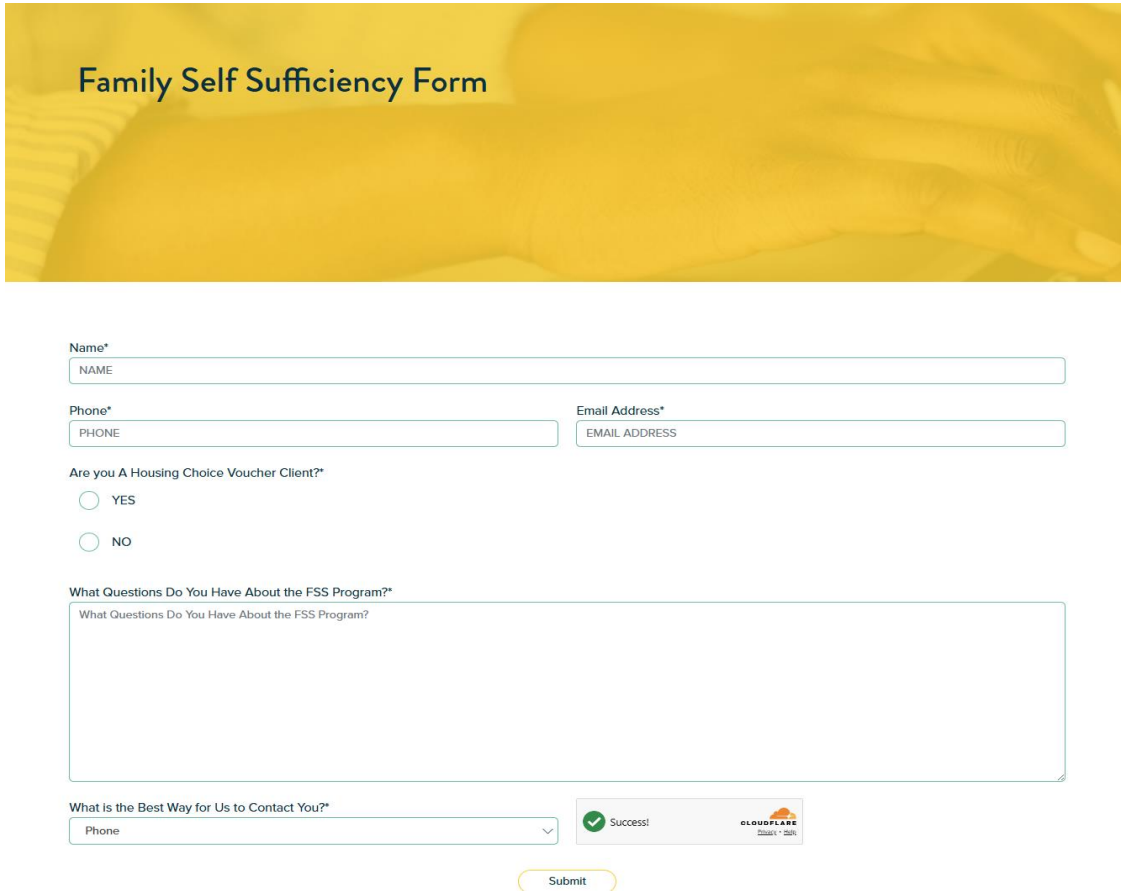
Selection and Eligibility



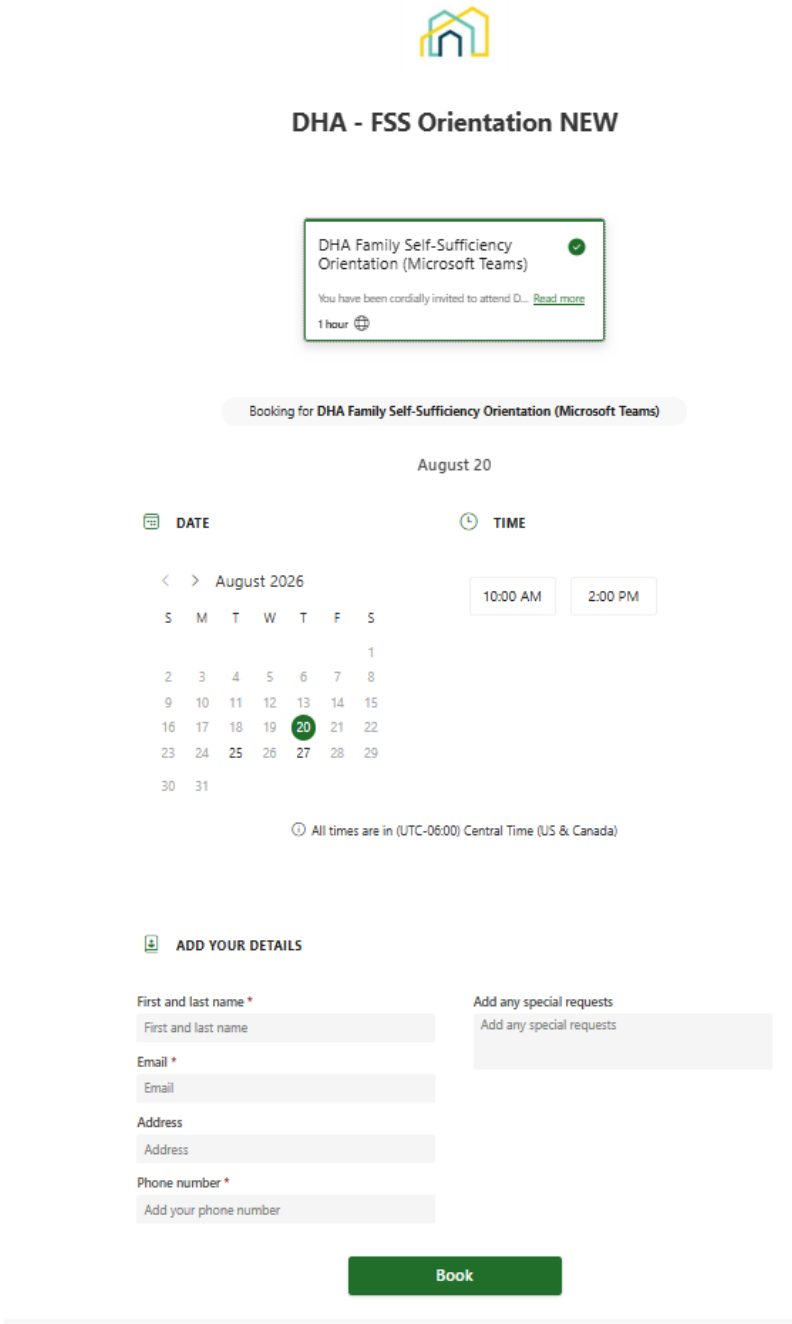
- Clients can express interest through
  - Website https://dhantx.com/family-self-sufficiency-form/
  - In person
  - Email (selfsufficiency@dhantx.com)

- Provide Bookings link to register for FSS

https://tinyurl.com/4ap9xnuc




Microsoft Bookings | Your Appointment Scheduling Solution

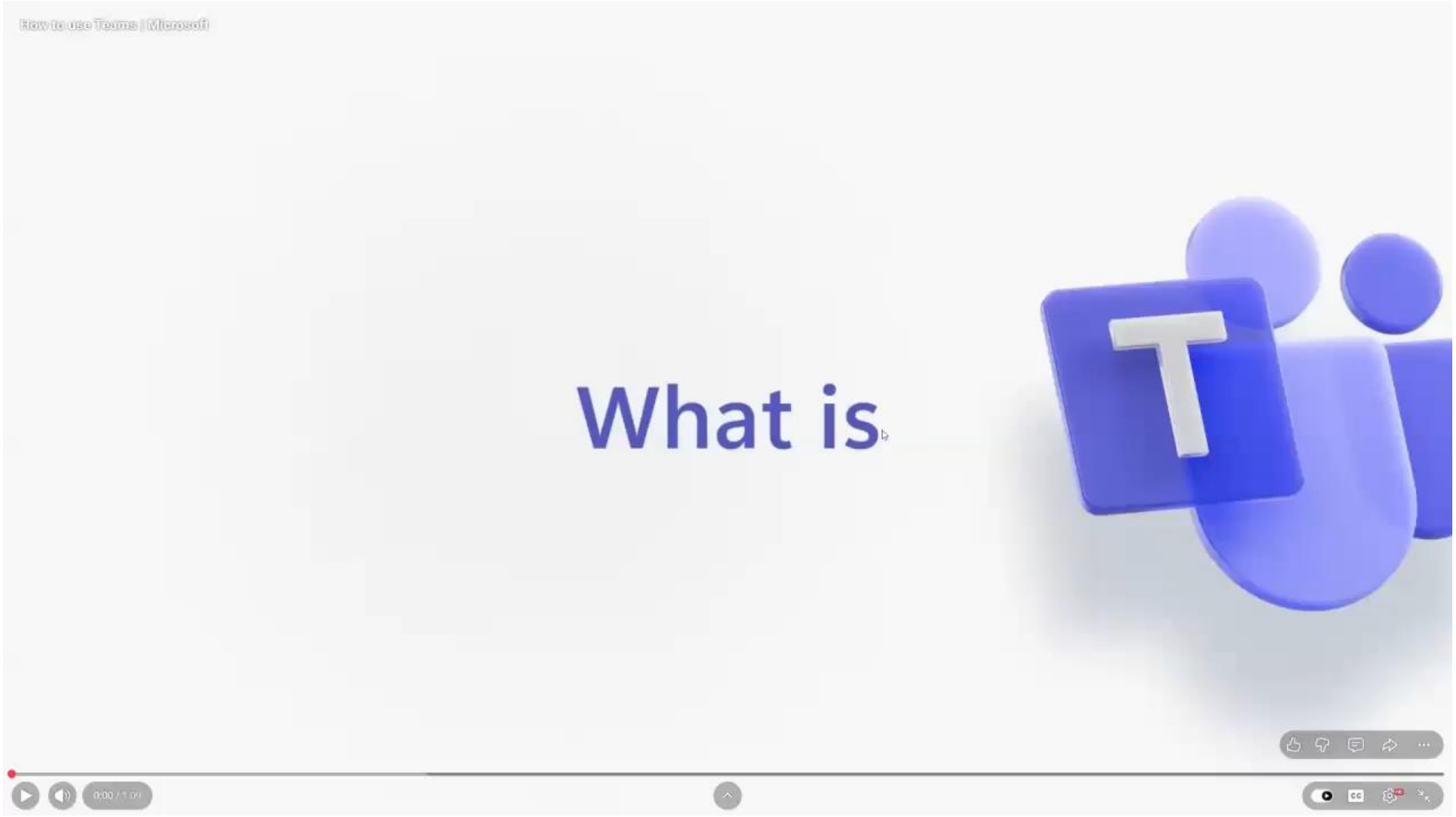


Selection and Eligibility

- https://outlook.office.com/book/DHAFSSOrientation1@dhadal.com/?ismsaljsauthenabled
- Microsoft Bookings gives you a personal booking link
- schedule an appointment
- How do you set-up?
  1. Open **Microsoft Bookings**
  2. Create your **Bookings calendar**.
  3. Add the people
  4. Create your services
  5. Set the **duration**
  6. Customize the booking page.
  7. Share the link by email
- Microsoft Bookings assist with online appointment scheduling, automatic confirmations and reminders, and provides a listing of clients' information.
- Microsoft bookings facilitated scheduling FSS orientations.

Orientation




How to use Teams | Microsoft
What is

Orientation

- Dha host virtual orientation Tuesday's and Thursday's mornings and afternoons
- In person orientations are available upon request
- The orientation presentation are prerecorded to ensure all clients obtain the same information



FAMILY SELF-SUFFICIENCY (FSS) NEEDS ASSESSMENT

Personal:

Client Name: _____ Client Number: _____

Date of Birth: _____ Social Security #: _____

Address: _____

Telephone #: _____ Alt. Telephone # _____

Other Adults: _____

What type of assistance, if any, do the other adults in the household receive?

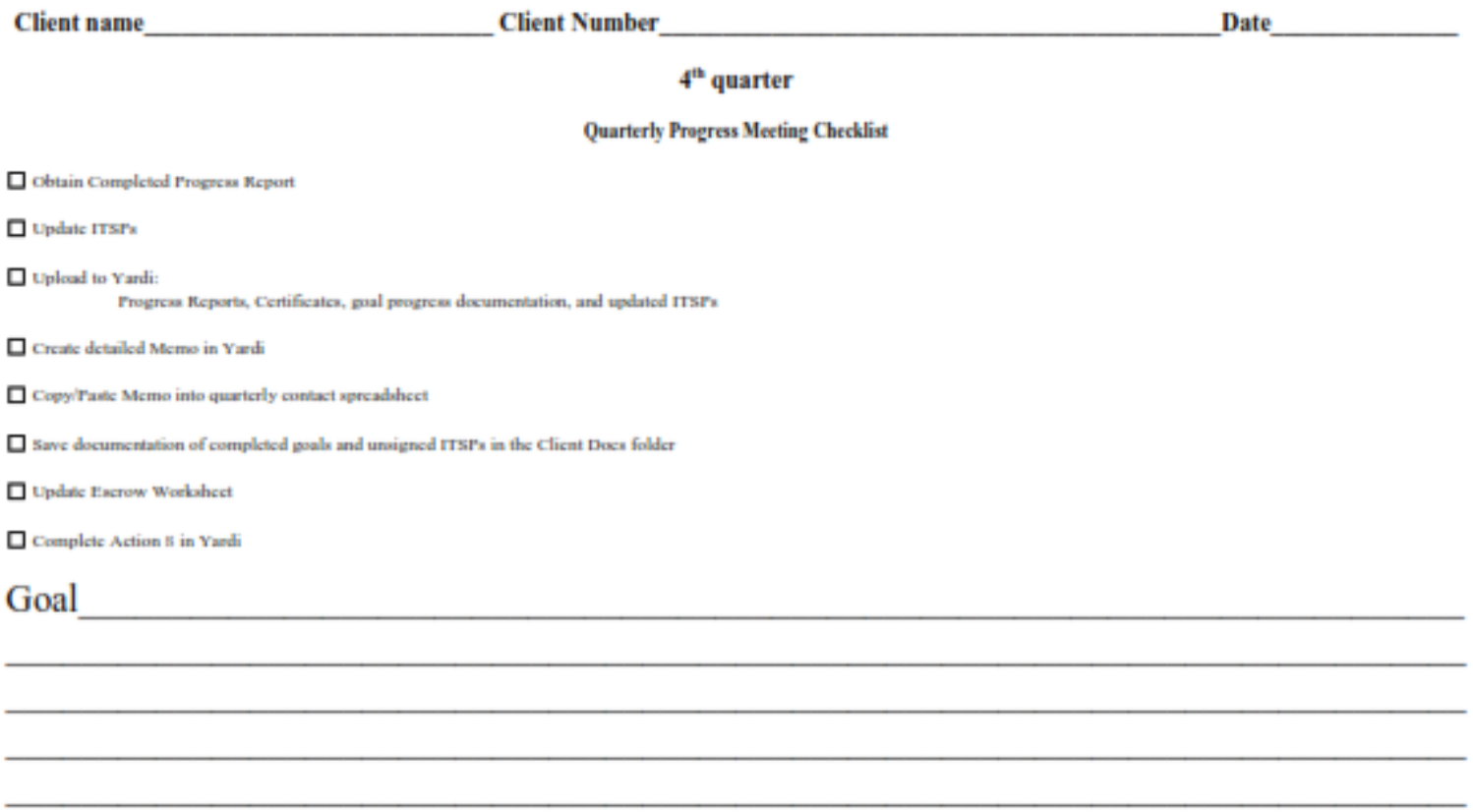
Name of Children	D.O.B.	Sex	Age	Child Care/School (location/grade)

- The Needs Assessment provides an overview regarding clients;
  - ❑ personal information
  - ❑ Education
  - ❑ Assistance currently received
  - ❑ Employment status
  - ❑ Interest
  - ❑ Possible needs

Initial Quarterly Contact



- Get to know the client
- Complete SWOT analysis
- Establish SMART Goals
- Establish ITSP



Client name_____ Client Number_____ Date_____

4th quarter

Quarterly Progress Meeting Checklist

- ☐ Obtain Completed Progress Report
- ☐ Update ITSPs
- ☐ Upload to Yardi:
  Progress Reports, Certificates, goal progress documentation, and updated ITSPs
- ☐ Create detailed Memo in Yardi
- ☐ Copy/Paste Memo into quarterly contact spreadsheet
- ☐ Save documentation of completed goals and unsigned ITSPs in the Client Docs folder
- ☐ Update Escrow Worksheet
- ☐ Complete Action 8 in Yardi

Goal_____

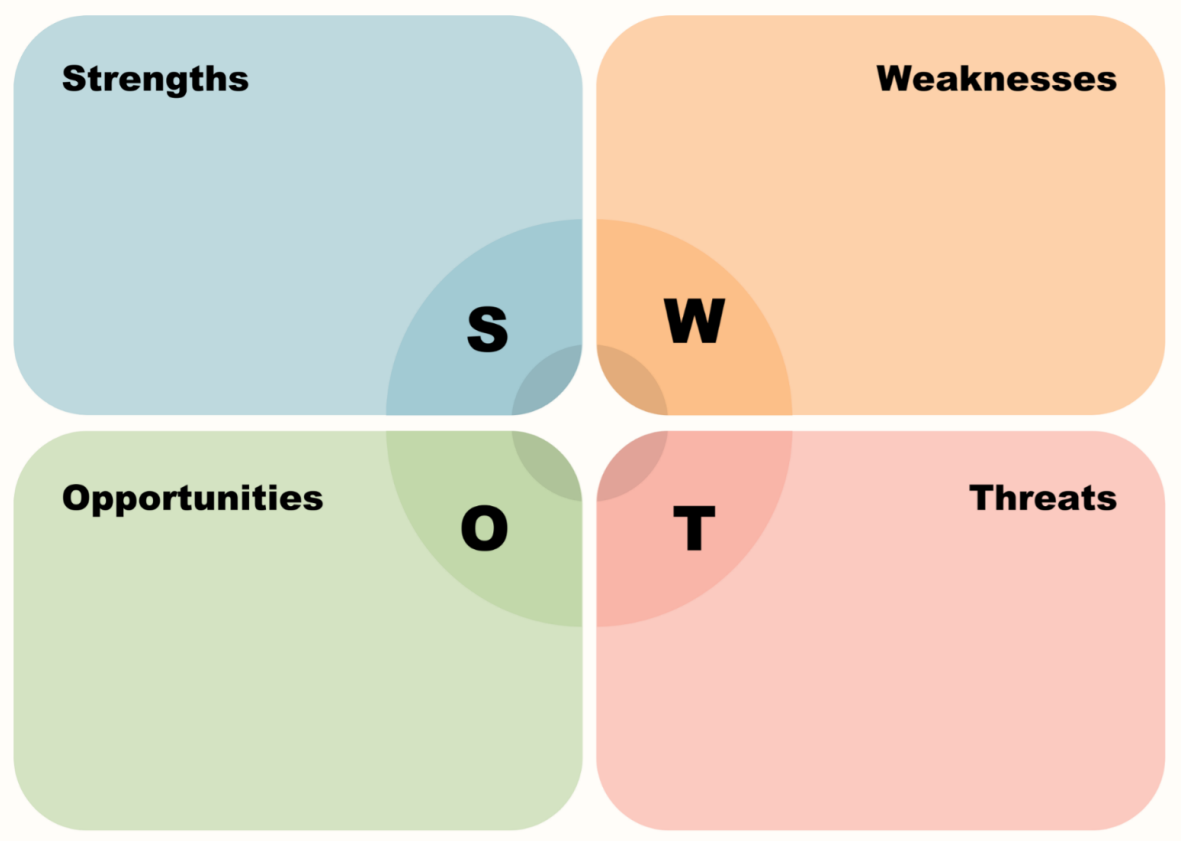
_____

_____

_____

_____

On first meeting the FSS coordinator and the tenant will discuss:



DHA
Housing Solutions for North Texas

S.M.A.R.T. GOALS WORKSHEET

Crafting S.M.A.R.T. Goals are designed to help you identify if what you want to achieve is realistic and determine a deadline. When writing S.M.A.R.T. Goals use concise language, but include relevant information. These are designed to help you succeed, so be positive when answering the questions.

INITIAL GOAL(S)	Write the goal(s) you have in mind
	• • •
S SPECIFIC	What do you want to accomplish? Who needs to be included? When do you want to do this? Why is this a goal?
	• • •
M MEASURABLE	How can you track progress and know if you've successfully met your goal?
	• • •
A ACHIEVABLE	Do you have the skills required to achieve the goal? If not, can you obtain them? What is the motivation for this goal? Is the amount of effort required on par with what the goal will achieve?
	• • •
R RELEVANT	Why am I setting this goal now? Is it aligned with overall objectives?
	• • •
T TIME-BOUND	What's the deadline and is it realistic?
	• • •
SMART GOAL(S)	Review what you have written, and craft a new goal(s) statement based on what the answers to the questions above have revealed
	• • •

Setting Goals

Initial Quarterly Contact

Categorize goals into 1 of 5 categories below

Education

PRIORITY:

Provide resources towards upper education, including academic and trade schools

Professional Opportunity

PRIORITY:

Support pursuits of stable professional opportunities

Financial Empowerment

PRIORITY:

Access to financial coaching and economic advancement opportunities, including credit repair

Housing Stability

PRIORITY:

Cultivate community empowerment through housing stability and home ownership

Health & Wellness

PRIORITY:

Address health disparities and improvement of health, both physical & mental

Family Self-Sufficiency Program
Individual Training and Services Plan

Attachment _____

Name of Participant	Social Security Number
Successful Client	XXX-XX-1234

Final Goal

Interim Goal Number _____

Obtain GED

Date Accomplished _____

Activities/Services	Responsible Parties	Date/s
Research GED Programs and identify 3 programs that fit me.	Successful Client	8/10/21 - 8/16/21
Provide GED Resources - free of charge	Smart Coordinator	8/10/21 - 8/13/21
Enroll in GED Program	Successful Client	8/10/21 - 9/30/21
Provide proof of completion to FSS Coordinator (GED Certificate)	Successful Client	8/10/21 - 1/31/22

Comments

Ms. Client was not able to enroll by initial target date, so we updated to 9/30/21. SC 8/10/21

DHA

Initial Quarterly Contact

- Individual Training Service Plan (ITSP)
  - Goals
  - Steps to complete goals
  - Timelines
  - Responsible parties

After completing FSS initial quarterly contact

Initial Quarterly Contact

- Email Client ITSP
- Request baseline
- Provide resources
- Provide a deadline



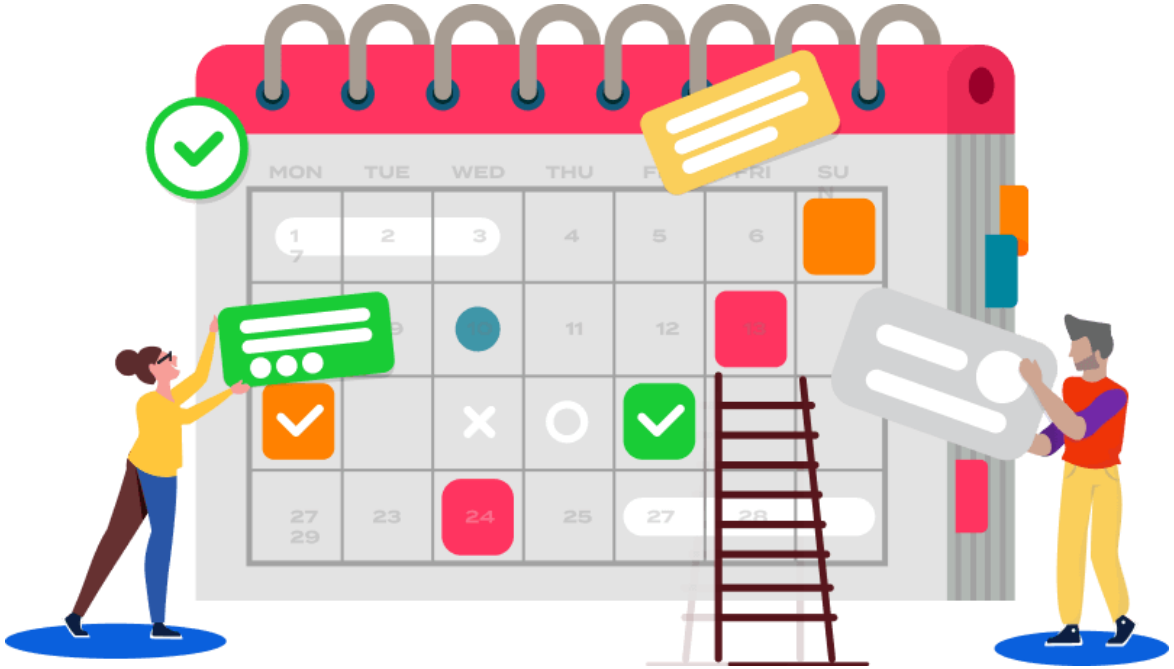
Quarterly Contact



Scheduling Quarterly Contacts

Quarterly Contact

- Schedule next meeting
- Use Outlook to schedule appointment
- Request updated documents
- Request a progress report
- Keeping track of appointments



DHA
Housing Solutions for North Texas

dhantx.com

FSS Progress Report

FSS Coordinator Name:

Fill in each blank below to receive credit for your report.

Name: Social Security #: xxx-xx-

Address: City: Zip:

Home/Cell #: Work #:

What are your goals?

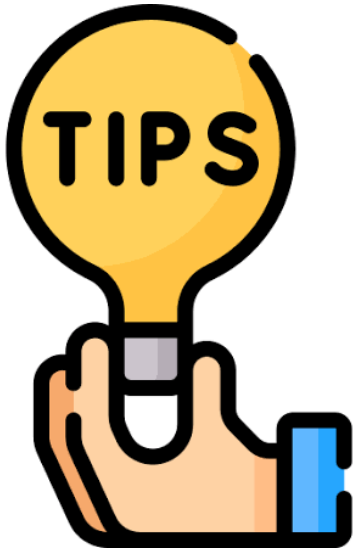
1.
2.
3.

- Help assess if client is working towards established goals

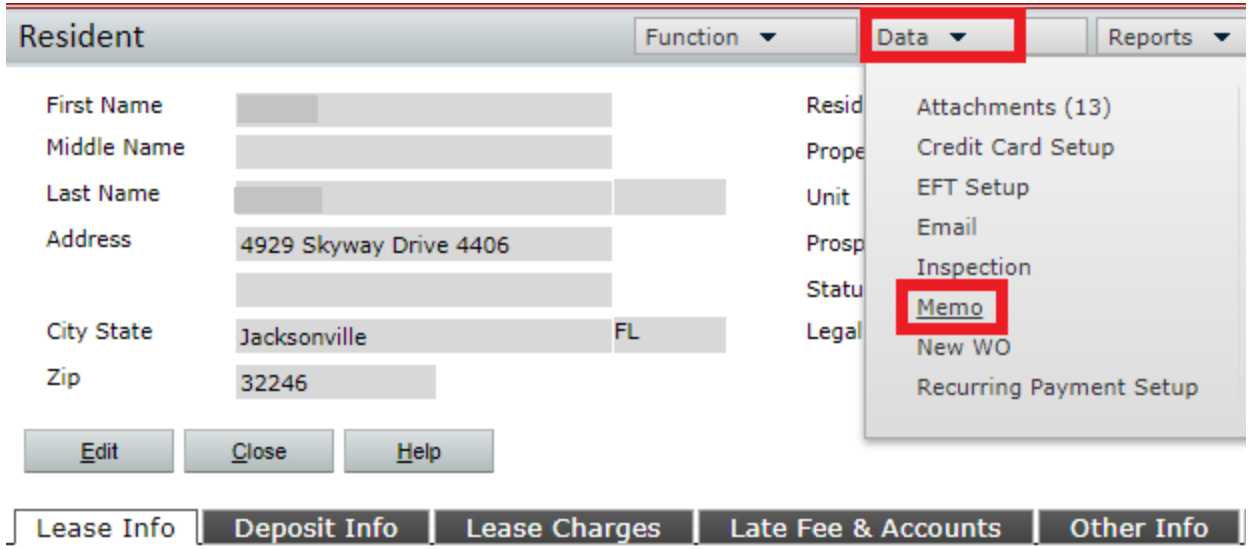
Tips for meeting with your client

Quarterly Contact

- Practice active listening
- Review goals and previous memos
- Provide client advise/ resources for goals
- Share escrow balance



Create Detailed Memo



Memos should include:

- Main points discussed
- Progress
- New goals
- Barriers
- Resources provided
- Items requested

Review Checklist



- ❑ Save completed Progress Report
- ❑ Update ITSP
- ❑ Upload documents to Yardi
- ❑ Create a detailed memo in Yardi
- ❑ Copy and paste memo to quarterly contact spread sheet
- ❑ Update escrow worksheet
- ❑ Complete Action 8

Escrow

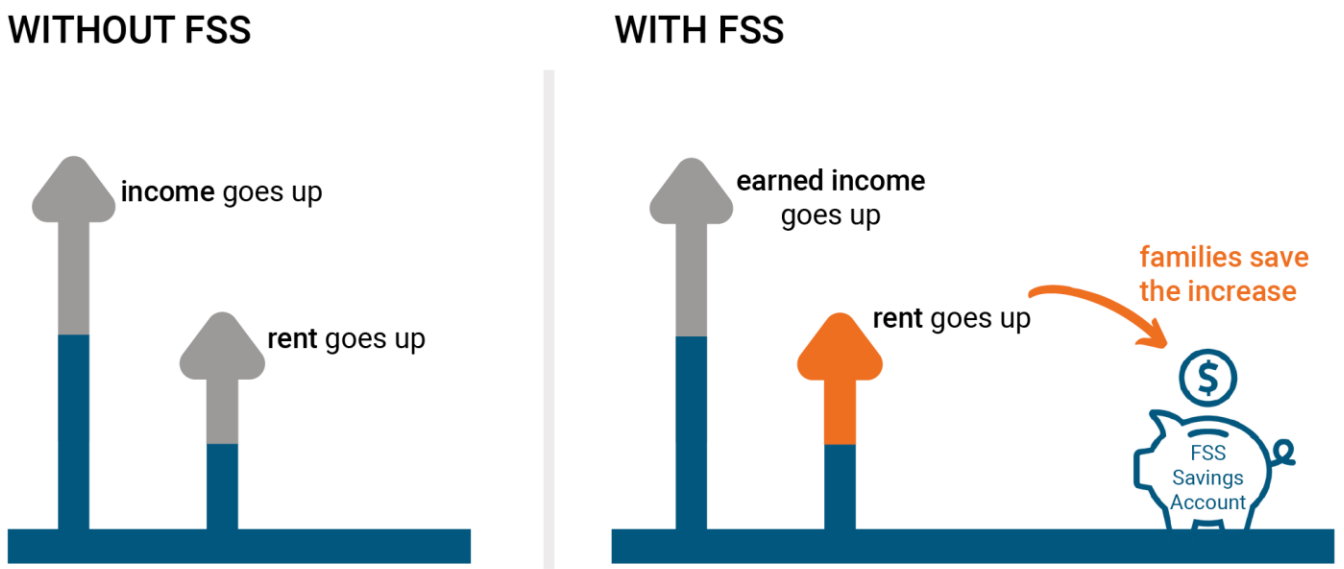


Financial Incentive:

Escrow

FIGURE 1

How FSS helps families save



Source: Author's representation

Brookings Metro

Escrow

FSS Escrow Worksheet							
Client Name		Client #		Contract Date	8/1/2019		
		1st Year	2nd Action	3rd Action	4th Action	5th Action	6th Action
	Effective Date	8/1/2019	2/1/2024	5/1/2024	6/1/2024	11/1/2024	11/30/2024
1	Baseline Monthly Rent (TTP or Flat Rent/Ceiling Rent/Other Rent) from CoP	$940	$940	$940	$940	$940	
2.	Baseline Annual Earned Income (Total Employment Income) from CoP	$39,501	$39,501	$39,501	$39,501	$39,501	
3.	Current Monthly Rent (TTP or Flat Rent/Ceiling Rent/Other Rent	$940	$2,122	$2,122	$1,488	$2,286	
4.	Current Earned Income (Wages + Business Income)	$39,501	$87,746	$87,746	$62,400	$94,326	
5.	Adjusted Annual Income	$37,581	$84,866	$84,866	$59,520	$91,446	
6.	Low-Income Limit	$77,150	$108,900	$108,900	$116,500	$116,500	
7.	Family's Housing Program	HCV -- Tenant-Based	HCV -- Tenant-Based	HCV -- Tenant-Based	HCV -- Tenant-Based	HCV -- Tenant-Based	
8.	Current Gross Rent (rent to Owner + Utility Allowance) for HCV, PBV, and Mod Rehab families	$1,308	$1,578	$2,078	$2,078	$2,078	
9.	Applicable Payment Standard (for HCV families)	$1,991	$2,860	$2,860	$2,860	$2,860	
A.	Growth in Monthly Rent	$0	$1,182	$1,182	$548	$1,346	$0
B.	Growth in Annual Earned Income	$0	$48,245	$48,245	$22,899	$54,825	$0
C.	30% of Monthly Earnings Growth	$0	$1,206	$1,206	$572	$1,371	$0
D.	Preliminary FSS Escrow Credit	$0	$1,182	$1,182	$548	$1,346	$0
E.	Maximum Escrow Amount	$368	$638	$1,138	$1,138	$1,138	-
F.	Eligible for Credit	Yes	Yes	Yes	Yes	Yes	-
G.	Final FSS Escrow Credit	$0	$638	$1,138	$548	$1,138	-
	Escrow Accrued	$0	$1,914	$1,138	$2,740	$1,138	-
	Interest Accrued (Finance Data Entry)	$14,859					
	Total Escrow Accrued	$14,859	$16,773	$17,911	$20,651	$21,789	-
	Number of Months Effective	-	3	1	5	1	1

- Internal FSS escrow calculation worksheet used to compare against Yardi calculations

FSS Escrow Account Credit Worksheet

1.	Current Annual Income (Enter amount from line 7i of form HUD-50058.)	61,040.00	
2.	Applicable Lower-Income Limit (Enter the current lower-income limit for the jurisdiction in which the FSS family is living.)	101,350.00	☐ Override Default
3.	Current Adjusted Income (Enter amount on line 8y of form HUD-50058.) **If line 3 is greater than line 2, this family does not qualify for an FSS credit.**	56,988.00	
4.	Earned income included in line 1 (Add up the income items coded B, M, F, HA, and W in column 7f of form HUD-50058.)	41,156.00	
5.	Earned income included in Annual Income on effective date of the FSS Contract of Participation. (Enter amount from contract of participation.)	36,616.00	☐ Override Default
6.	Increase in earned income since the effective date of the FSS Contract of Participation. (Subtract line 5 from line 4. If negative, enter 0.)	4,540.00	
7.	Current Annual Income less increase in earned income since the effective date of the FSS Contract of Participation. (Subtract line 6 from line 1.)	56,500.00	
8.	Thirty percent of current monthly Adjusted Income (Line 3 divided by 12 times 0.3. The calculated amount should equal the amount on line 9f of form HUD-50058.) May differ from 9f if a non-standard rent calculation is used	1,425.00	
9.	Current Adjusted Income less increase in earned income since the effective date of the FSS Contract of Participation. (Subtract line 6 from line 3.)	52,448.00	
10.	30% of current monthly Adjusted Income less increase in earned income since the effective date of the FSS Contract of Participation. (Line 9 divided by 12 times 0.3)	1,311.00	
11.	10% of current monthly Annual Income less increase in earned income since the effective date of the FSS Contract of Participation. (Line 7 divided by 120)	471.00	
12.	If applicable, welfare rent (enter amount on line 9g of form HUD-50058) or public housing ceiling rent (enter amount on line 10c of form HUD-50058). Enter 0. *	0.00	
13.	TTP based on current Annual Income less increase in earned income since effective date of the FSS Contract of Participation. (If housing choice vouchers, enter the amount on line 10, otherwise, enter the greater of line 10, 11, or 12.)	1,311.00	
14.	Difference between 30% of current monthly Adjusted Income and TTP adjusted for increases in earned income. (Subtract line 13 from line 8. Enter 0 if negative.)	114.00	
15.	Current TTP (Enter the amount on line 9j of form HUD-50058. In the case of housing choice vouchers, enter the amount on line 8 of this form. If family is paying flat rent, enter the amount on line 10b of form HUD-50058. If the family is paying ceiling rent, enter the amount on line 10d of form HUD-50058.) *	1,425.00	
16.	TTP on effective date of the FSS Contract of Participation or, in the case of housing choice vouchers, 30% of monthly Adjusted Income on effective date of the FSS Contract of Participation. (Enter amount from contract of participation.)	926.00	☐ Override Default
17.	Difference between current TTP and TTP on effective date of the FSS Contract of Participation. (Subtract line 16 from line 15. Enter 0 if negative.)	499.00	
18.	Enter the lesser of line 14 or line 17 or, if the family is paying flat rent, enter line 17. *	114.00	
19.	Applicable Very Low-Income Limit (Enter the current very low-income limit for the jurisdiction in which the FSS family is living.)	63,350.00	☐ Override Default
20.	Amount by which Adjusted Income exceeds the Very Low-Income Limit (Subtract line 19 from line 3.)	0.00	
21.	30% of the amount by which Adjusted Income exceeds the Very Low-Income Limit (Line 20 divided by 40)	0.00	
22.	Escrow credit (Subtract line 21 from line 18.)	114.00	

Fair Market Rent	4,060.00
Does participant qualify for graduation?	N

DHA

Escrow

- Appendix tab obtained from Yardi based off information input by caseworker

Family Self Sufficiency Escrow Statement

Statement Period 09/2024 to 07/2026

Dallas Housing Authority
3939 N. Hampton Road
Dallas, TX 75212

[redacted]

Account Information

Client Name [redacted]
Client Number
FSS Caseworker
Caseworker

Account Recap

Beginning Balance as Of August 31, 2024	0.00
16 Bal Fwd/Escrow/ Interest Contributions/Misc	7,553.53
0 Disbursement / Forfeitures	0.00
Ending Balance as Of July 31, 2026	7,553.53

Account Activity

Date	Post Month	Check #	Description	Amount
Escrow/Interest Contributions				
03/01/2025			Monthly Escrow Contribution For 12/01/2024	680.00
03/01/2025			Monthly Escrow Contribution For 01/01/2025	680.00
03/01/2025			Monthly Escrow Contribution For 02/01/2025	680.00
03/01/2025			Monthly Escrow Contribution For 03/01/2025	680.00
04/01/2025			Monthly Escrow Contribution For 04/01/2025	680.00

- Escrow statement generated in Yardi
- Provides current balance
- Monthly deposits

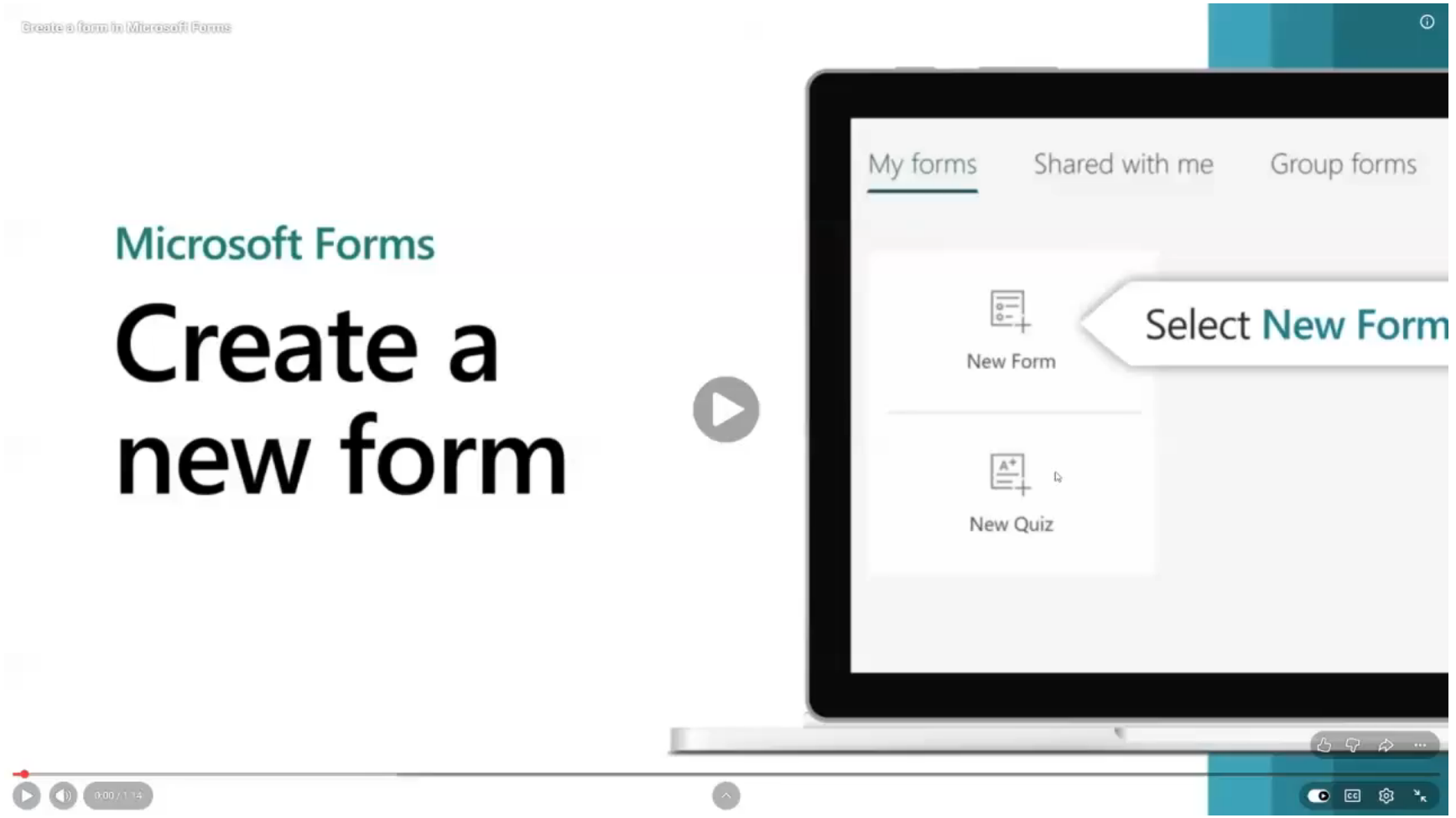
Escrow verification

- Review after every quarterly
- If client request an escrow balance
- September for FSS Escrow Project
- Before mailing escrow statement in January



Resources / PCC

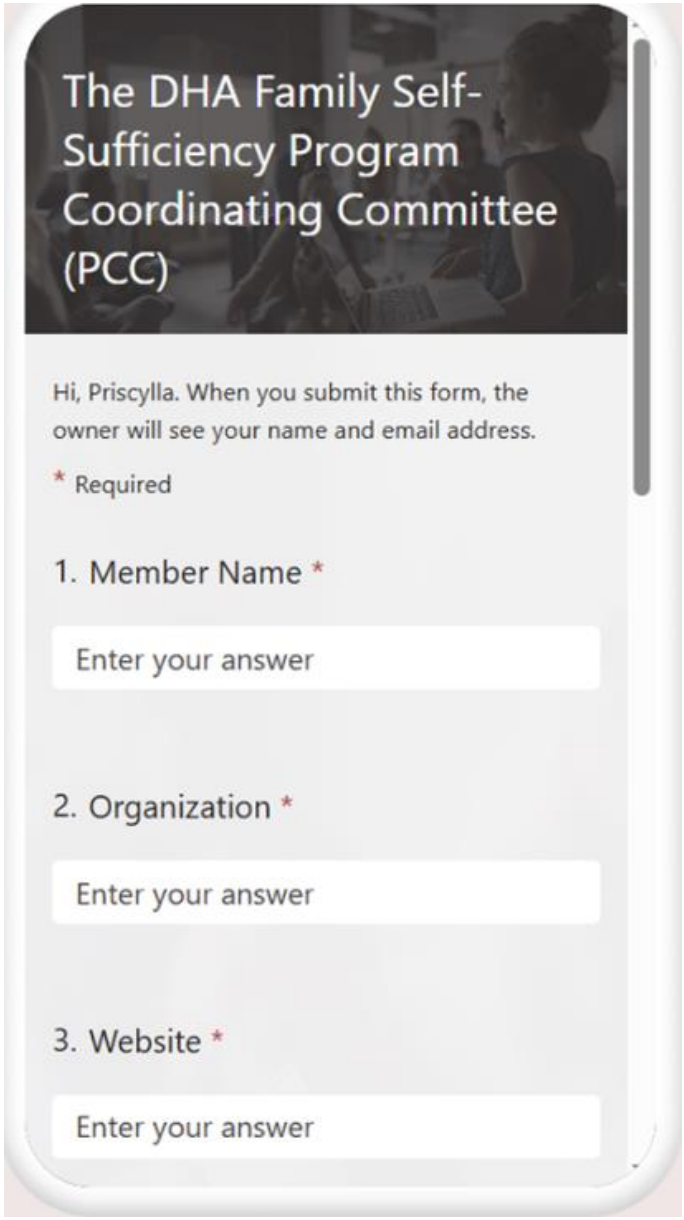



Create a form in Microsoft Forms
Microsoft Forms
Create a new form
My forms
Shared with me
Group forms
New Form
Select New Form
New Quiz

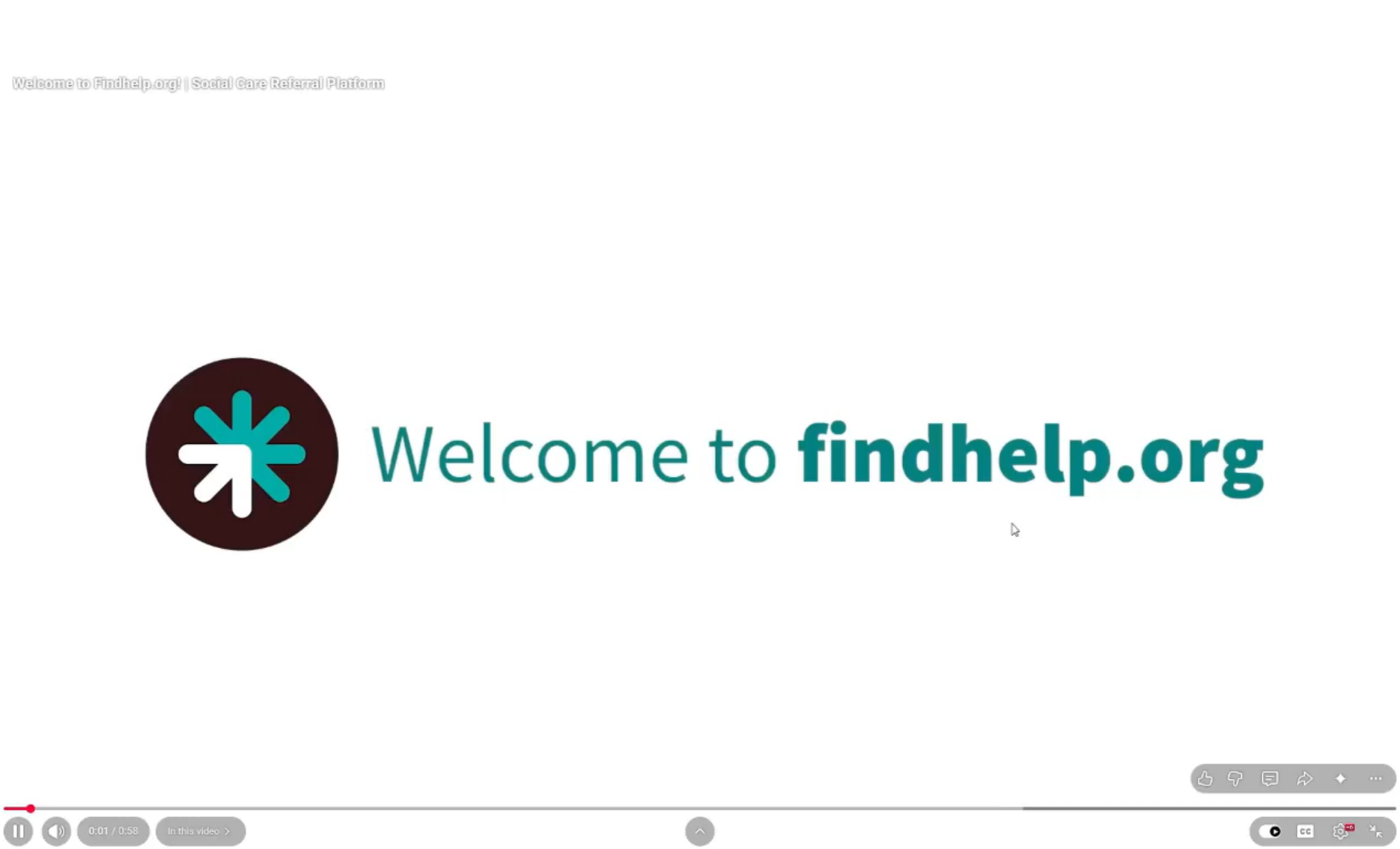
The Program Coordinating Committee (PCC)

A PCC is a group of service providers and other key partners with the purpose of *coordinating services* and programs in the community for FSS participants.

- Meet periodically
- Resource access
- Benefit all




Meet MyFriendBen
0:00 / 0:30


Welcome to Findhelp.org! | Social Care Referral Platform
Welcome to findhelp.org
0:01 / 0:58
In this video

Community Partners provide direct services to DHA residents. Service Providers include, but not limited to:



















































$7,306.20
AWARDED

"If you always do what you've done you'll always get what you've always got. (If you don't change your actions, you can't expect different results)"

MAURESTA BATTS

Housing Solutions for North Texas

What conditions were you faced with when you started the FSS program?
When I joined the FSS Program, I found myself grappling with significant financial instability. This situation was characterized by a lack of consistent income and the overwhelming burden of relying on welfare programs for basic needs. The uncertainty surrounding my financial future created a sense of anxiety and helplessness.

What obstacles did you overcome?

Throughout my journey, I encountered several significant challenges that tested my resilience and adaptability. Among these were issues related to transpiration, which affected my ability to maintain optimal conditions in various environments, as well as employment instability that made it difficult to secure a steady income.

What did you accomplish?
I have been able to enhance my self-reliance by securing stable employment and maintaining it, thereby providing better support for myself and my family. I successfully paid off two cars, improved my credit score, and am currently in the process of enrolling in a school program offered through my job.

How has being in the FSS program transformed your life?
As a result of overcoming these obstacles, I developed a greater understanding of financial management. The FSS Program helped educate me on budgeting, investing, and saving strategies that empowered me to make informed decisions regarding my finances. This newfound financial savvy has enabled me to build a more secure future for myself.

Q&A