Integrating Housing Stability & Homeownership Topics into Your FOC Coaching

January 20th, 2022

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Housekeeping

- All lines have been muted upon entry to reduce background noise
- This session is being recorded and will be posted on our website within a week (FOC-network.org)
- We will distribute the slides and the recording after this session
- Please enter any questions you have into the chat box – we will answer at the end

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Agenda

- Welcome
- The Importance of Integrating Housing Stability
  & Homeownership Topics into Coaching
  - Build Wealth
  - Fannie Mae
- Housing Advisory Committee
- Housing Assessment
- Q&A
- Next Steps

Promoting Housing Stability and Pathways to Homeownership through FOC Integrated Services

Through a new partnership with Fannie Mae, LISC is able to build Financial Opportunity Centers® (FOCs) capacity to incorporate housing stability into FOC coaching conversations and enhance their integration of housing/homeownership services with the FOC core services.

Housing Advisory Committee

The purpose of the committee was to contribute to the refinement of the FFT™ Template to include enhanced housing data tracking – housing stability and pre & post homeownership counseling.

Outcomes:

- Refined Outbound Referrals
- Refined Financial Counseling Service Entries
- New Housing Assessment

FOC Members

ASOCIACIÓN PUERTORRIQUEÑOS EN MARCHA
A health, human services and community development nonprofit working to assist families achieve their greatest potential

the Alliance

POAH CHICAGO

HACE

INLIVIAN HOUSING REDEFINED

CENTER for CHANGING LIVES

CHINESE COMMUNITY CENTER

Housing Assessment Guide

Why is the Housing Assessment important?

- It helps coaches understand a client's housing situation and can serve as a starting point for coaches to incorporate housing goals and topics into their coaching sessions.

What is the role of a Financial Coach?

- Coaches support clients and connect them to available resources - housing program, in-house or through local partners. Depending on housing needs, coaches may set goals and action plans specifically focused on housing.

How frequent should the assessment be updated?

- Every 6 months after the initial assessment.

What is in the Housing Assessment form?

- The assessment consists of 15 questions divided into three sections: Housing Status, Housing Conditions, and Housing Costs.

What else can I find in The Housing Assessment Guide?

- Additional Housing Resources - Help for homeowners, including information about forbearance, legal assistance or submitting a complaint. Help for renters, including information about local rental assistance programs and what to do if your client is facing eviction
- This guide will walk coaches on how to complete the Housing Assessment in FFT-Salesforce

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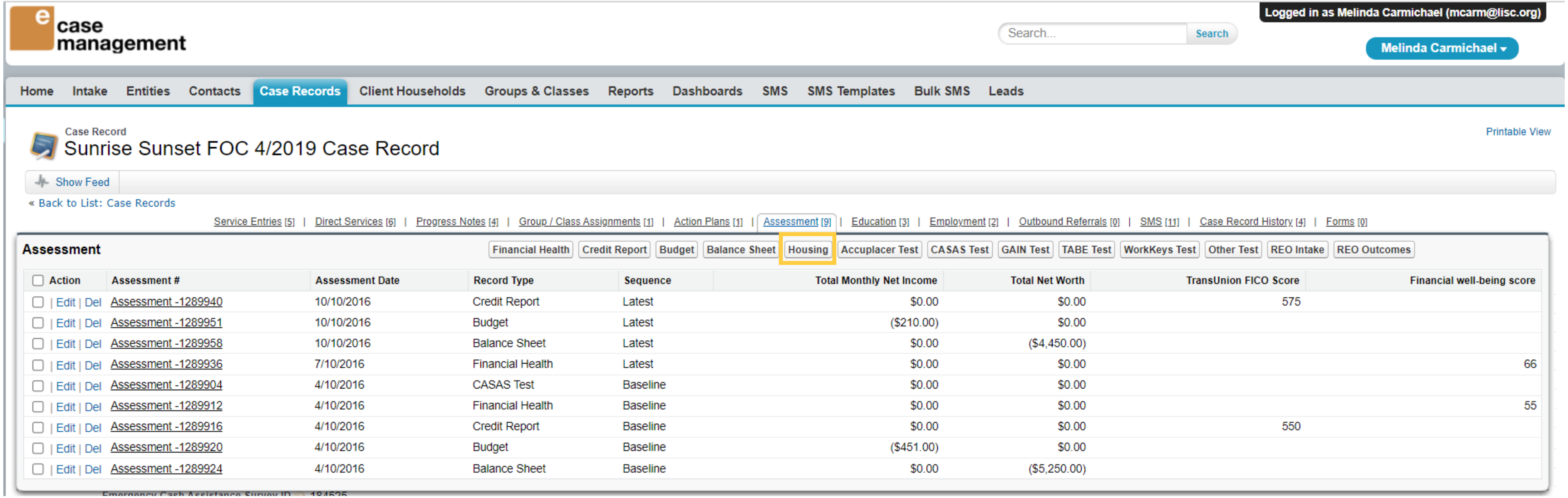
Housing Services Data Tracking in FFT™

A. Housing Assessment



Action	Assessment #	Assessment Date	Record Type	Sequence	Total Monthly Net Income	Total Net Worth	TransUnion FICO Score	Financial well-being score
Edit | Del	Assessment -1289940	10/10/2016	Credit Report	Latest	$0.00	$0.00	575	
Edit | Del	Assessment -1289951	10/10/2016	Budget	Latest	($210.00)	$0.00		
Edit | Del	Assessment -1289958	10/10/2016	Balance Sheet	Latest	$0.00	($4,450.00)		
Edit | Del	Assessment -1289936	7/10/2016	Financial Health	Latest	$0.00	$0.00		66
Edit | Del	Assessment -1289904	4/10/2016	CASAS Test	Baseline	$0.00	$0.00		
Edit | Del	Assessment -1289912	4/10/2016	Financial Health	Baseline	$0.00	$0.00		55
Edit | Del	Assessment -1289916	4/10/2016	Credit Report	Baseline	$0.00	$0.00	550	
Edit | Del	Assessment -1289920	4/10/2016	Budget	Baseline	($451.00)	$0.00		
Edit | Del	Assessment -1289924	4/10/2016	Balance Sheet	Baseline	$0.00	($5,250.00)		

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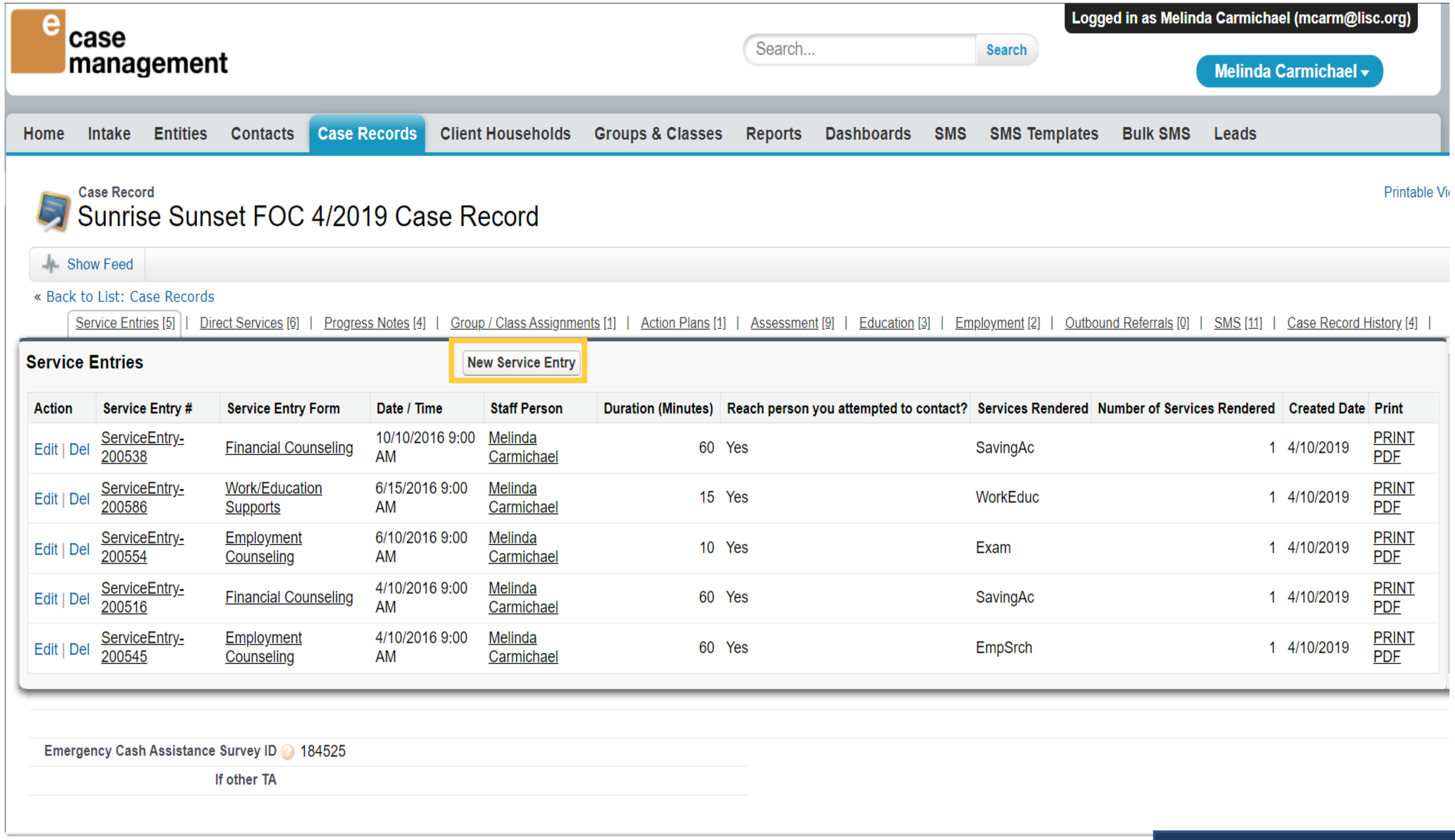
Refer to the **Housing Assessment Guide and Frequently Asked Questions** for more information

Housing Services Data Tracking in FFT™

B. Financial Counseling Service Entries



Action	Service Entry #	Service Entry Form	Date / Time	Staff Person	Duration (Minutes)	Reach person you attempted to contact?	Services Rendered	Number of Services Rendered	Created Date	Print
Edit | Del	ServiceEntry-200538	Financial Counseling	10/10/2016 9:00 AM	Melinda Carmichael	60	Yes	SavingAc	1	4/10/2019	PRINT PDF
Edit | Del	ServiceEntry-200586	Work/Education Supports	6/15/2016 9:00 AM	Melinda Carmichael	15	Yes	WorkEduc	1	4/10/2019	PRINT PDF
Edit | Del	ServiceEntry-200554	Employment Counseling	6/10/2016 9:00 AM	Melinda Carmichael	10	Yes	Exam	1	4/10/2019	PRINT PDF
Edit | Del	ServiceEntry-200516	Financial Counseling	4/10/2016 9:00 AM	Melinda Carmichael	60	Yes	SavingAc	1	4/10/2019	PRINT PDF
Edit | Del	ServiceEntry-200545	Employment Counseling	4/10/2016 9:00 AM	Melinda Carmichael	60	Yes	EmpSrch	1	4/10/2019	PRINT PDF

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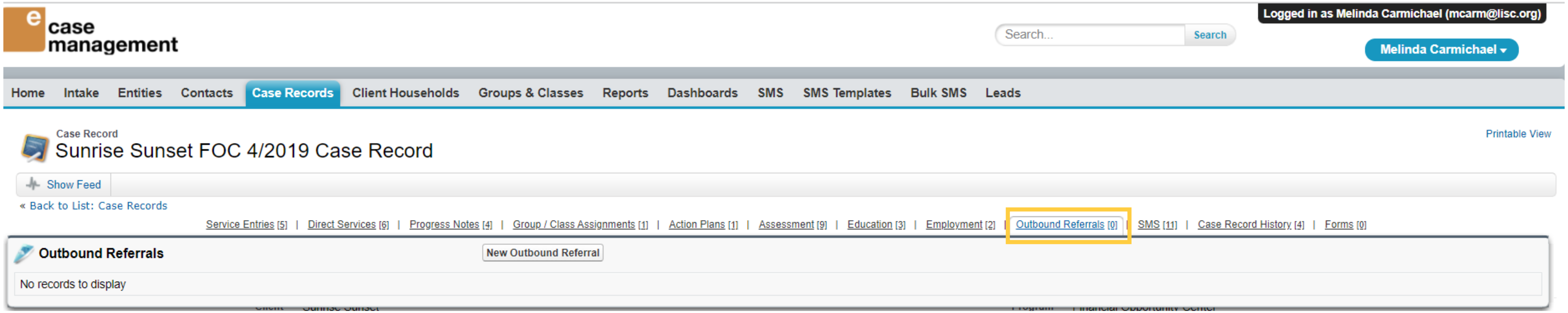
Refer to the **Housing Assessment Guide and Frequently Asked Questions** for more information

Housing Services Data Tracking in FFT™

C. Outbound Referral

First search for the client's Case Record. Once you are there, hover over **Outbound Referrals** and click on **New Outbound Referral**



Refer to the **Housing Assessment Guide and Frequently Asked Questions** for more information

Support and Technical Assistance

- Connect with LISC local Program Officer for support
- Utilize the resources of the FOC Network website, including Salesforce General Guidelines
- Drop-in during the Salesforce Support Hour on the 1st and 3rd Monday of every month at 1:00 PM CST
- For additional questions contact the support desk at fftfocsupport@lisc.org

FAQ

Next Steps

- Start using Housing Assessment
- Housing Advisory Committee
- Leverage FOC resources on the FOC-Network Website

Upcoming Events

- National Savings Campaign: What Financial Products are Right for Your Clients?
  Thursday, Jan 27 | 1:00 PM CST
- Tax Time: What Omicron, Child Tax Credits and New Changes Mean for 2021 Taxes
  Thursday, Feb 03 | 1:00 PM CST

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Family Income & Wealth Building

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