

Integrating Housing Stability & Homeownership Topics into Your FOC Coaching

January 20th, 2022

LISC



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

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*



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

Housing Services Data Tracking in FFT™


A. Housing Assessment

The screenshot displays the FFT Case Management interface. At the top, the user is logged in as Melinda Carmichael (mcarm@lisc.org). The navigation menu includes Home, Intake, Entities, Contacts, Case Records, Client Households, Groups & Classes, Reports, Dashboards, SMS, SMS Templates, Bulk SMS, and Leads. The current view is for a Case Record titled "Sunrise Sunset FOC 4/2019 Case Record". Below the title, there are buttons for "Show Feed" and "Back to List: Case Records". A breadcrumb trail shows the user is in the "Assessment" section, with a count of 9 items. The "Assessment" section includes a filter bar with tabs for Financial Health, Credit Report, Budget, Balance Sheet, Housing (selected), Accuplacer Test, CASAS Test, GAIN Test, TABE Test, WorkKeys Test, Other Test, REO Intake, and REO Outcomes. The main table lists assessment records with columns for Action, Assessment #, Assessment Date, Record Type, Sequence, Total Monthly Net Income, Total Net Worth, TransUnion FICO Score, and Financial well-being score.

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


Housing Services Data Tracking in FFT™

B. Financial Counseling Service Entries


Logged in as Melinda Carmichael (mcar@lisc.org)

Melinda Carmichael ▾

[Home](#) [Intake](#) [Entities](#) [Contacts](#) **[Case Records](#)** [Client Households](#) [Groups & Classes](#) [Reports](#) [Dashboards](#) [SMS](#) [SMS Templates](#) [Bulk SMS](#) [Leads](#)

 Case Record Printable View
Sunrise Sunset FOC 4/2019 Case Record

[« Back to List: Case Records](#)

[Service Entries \(5\)](#) | [Direct Services \(6\)](#) | [Progress Notes \(4\)](#) | [Group / Class Assignments \(1\)](#) | [Action Plans \(1\)](#) | [Assessment \(9\)](#) | [Education \(3\)](#) | [Employment \(2\)](#) | [Outbound Referrals \(0\)](#) | [SMS \(11\)](#) | [Case Record History \(4\)](#)

Service Entries											New Service Entry
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	

Emergency Cash Assistance Survey ID

If other TA

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**

The screenshot displays the FFT Case Management web application interface. At the top left is the 'e case management' logo. A search bar is located at the top right, with the text 'Logged in as Melinda Carmichael (mcarm@lisc.org)' and a user profile dropdown for 'Melinda Carmichael'. A navigation menu below the search bar includes links for Home, Intake, Entities, Contacts, Case Records (highlighted), Client Households, Groups & Classes, Reports, Dashboards, SMS, SMS Templates, Bulk SMS, and Leads. The main content area shows the 'Case Record' for 'Sunrise Sunset FOC 4/2019 Case Record' with a 'Printable View' link. Below the case title is a 'Show Feed' button and a 'Back to List: Case Records' link. A horizontal menu of filters is visible, including 'Service Entries (5)', 'Direct Services (6)', 'Progress Notes (4)', 'Group / Class Assignments (1)', 'Action Plans (1)', 'Assessment (9)', 'Education (3)', 'Employment (2)', 'Outbound Referrals (0)' (highlighted with a yellow box), 'SMS (11)', 'Case Record History (4)', and 'Forms (0)'. Below this menu is a section titled 'Outbound Referrals' with a 'New Outbound Referral' button and the text 'No records to display'.

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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