



# SHERA Best Practices & 18 Month Policy Session

June 29, 2021

Last Updated: June 14, 2021

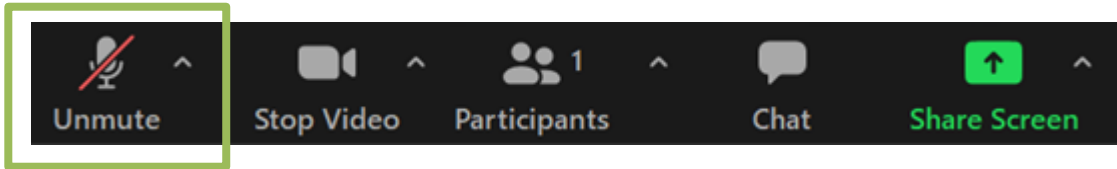


# ENGAGEMENT BEST PRACTICES



## Please Mute

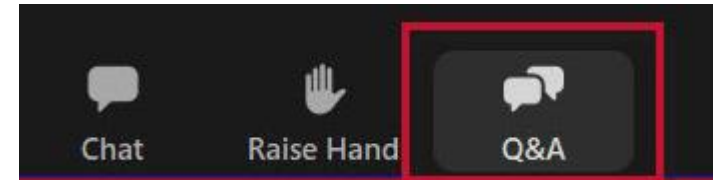
Please join the meeting muted during the session to keep interruptions to a minimum



## Asking Questions

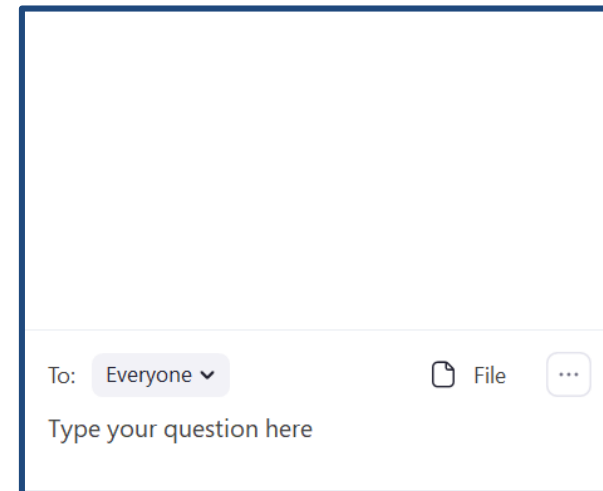
We will be monitoring the Q&A for questions

1



Click “Q&A” to open the chat window

2



Enter your question into the chat

*We will follow up with answers to any questions that we don't get to during the session.*

# THIS CALL IS BEING RECORDED



# MEET YOUR FACILITATORS



**Rob Muollo**  
DHCD

**Robert Ortiz**  
UHM Properties

**Julianna Stuart**  
POAH

**Carrie Moore**  
Dedham Housing  
Authority

**Trevor Samios**  
Winn

**Rosalind Cresswell**  
Massachusetts Office of  
Public Collaboration  
(MOPC), UMASS Boston

## TRAINING & PROGRAM SUPPORT

VIVA & Accenture

# Our Journey Today

75 MINUTES



**Training Goals & Objectives**



**SHERA Program Overview & Accomplishments**



**SHERA Policy Expansion & Terms**



**SHERA Best Practices & Benefits**



**Community Mediation**



**Reminders & Support**



**Questions**

## Purpose



Review the **Subsidized Housing Emergency Rental Assistance (SHERA) 18-month Policy** and provide an understanding of **Best Practices** for the program

## Goal



**Provide guidance to better support property owners** and tenants who are eligible for SHERA

# WE WANT TO HEAR FROM YOU! *MENTI LIVE POLLS*



**What **ROLE** do you play at your property / site?**

**Have you submitted any claims through the **SHERA** portal yet?**

## How to Participate

1. Go to **Menti.com** on your smartphone or computer browser.
2. Enter the code **2309 3644** into the field shown to the right



Please enter the code

12 34 56

Submit

The code is found on the screen in front of you

# SHERA PROGRAM OVERVIEW & BENEFITS



The **Subsidized Housing Emergency Rental Assistance (SHERA) Program** is a federally funded emergency housing assistance program for renters impacted by COVID-19. The Massachusetts affordable housing owner and property management network can help residents pay COVID-related rent arrears from April 1, 2020 to September 30, 2021

## Bulk Uploads

Owner-based, online process to apply on behalf of multiple households in a single application.

## Income Certification

Most owners can document tenant income eligibility through 2020 or 2021 income verifications already required to comply with state or federal programs.

## Response Time

The average time from application submission to approval is 18 days, with direct payment to the owner / authorized agent.

## Eviction Diversion Pledge

Build on pledge of working with households to divert eviction due to rent arrearages and keep residents stably housed. Owners will continue to refer tenants to the RAAs for utility and moving expense assistance.

**DHCD in partnership with MassHousing and Massachusetts Housing Partnership (“MHP”)**





# SHERA PROGRAM BY THE NUMBERS



The program went live on May 20, 2021, as of June 28, 2021, SHERA has....



ASSISTED **130** PROPERTIES



**18-DAY** AVERAGE FROM  
SUBMISSION TO PAYMENT



ASSISTED **607** HOUSEHOLDS



**5 MONTHS** AVERAGE  
RENTAL ARREARS



COMMITTED / PAID  
**\$1,251,738** IN OVERDUE  
RENT



**\$2,062** AVERAGE RENT  
ARRERAGE AMOUNT PER  
HOUSEHOLD



# SHERA POLICY UPDATES

# 18 Month SHERA Eligible Period



- Effective **July 1**, the Subsidized Housing Emergency Rental Assistance (SHERA) Program will extend benefits from 12 to **18 months**
- SHERA will cover tenant-share rent arrearages due between **April 1, 2020** and **September 30, 2021**.
- SHERA will only process claims for a given month **after the first day of the following month**. Current and future months will not be processed.
  - **Example:** claims for July 2021 arrears will be accepted no earlier than August 1st. Claims for August 2021 arrears will be accepted no earlier than September 1st.

# Reapplications for Additional Assistance



- Owners may apply **multiple times** for a single tenant household, provided that the claims are for **different months of assistance**.
- Households that have **already signed a tenant certification** and have consented for the owner to apply to SHERA on their behalf **DO NOT** need to complete a new certification to receive assistance beyond the original April 1, 2020 – March 2021 SHERA eligibility period.
- Households may **OPT-OUT** of additional assistance. If an owner/agent intends on requesting additional assistance for households beyond March 2021, they **must first share an Opt-Out notice with the household of its intent to do so** (language provided). The household should have **at least five (5) days to respond** if it wishes to decline the additional assistance.



## Income Documentation

- Use of monthly, point in time income documentation is only acceptable for a single application of rental arrearage assistance. A yearly certification of income or use of 2020 IRS Form 1040 does not require the tenant to resubmit income documents.



## Frequency of Submission

- Owner/agents have flexibility in how often they submit claims for assistance.
  - *For example, owners may choose to batch and submit claims every three months or submit a single claim each month.*

# SHERA Application Claim Examples (1 of 2)



## CLAIM ALREADY SUBMITTED, PENDING APPROVAL

These claims will be processed for payment. Owners/agents must submit new claim(s) in the SHERA Portal for any new months of assistance requested for each household.

### EXAMPLE

*A claim is submitted in the SHERA Portal for April 2020 thru March 2021 arrears totaling \$5,000 and is pending approval. The tenant household also has rent due for April, May, and June 2021. The owner/agent may submit claim(s) for these additional arrearage amounts starting July 1, 2021.*



## CLAIM ALREADY APPROVED

Households with a SHERA claim that was approved under the initial April 1, 2020 – March 31, 2021 period may apply for additional months through September, 2021.

### EXAMPLE

*A claim is submitted in the SHERA Portal for June 2020 thru February 2021 arrears totaling \$3,000 was approved. The tenant household also has rent due for August 2021. The owner/agent may submit claim(s) for these additional arrearage amounts starting September 1, 2021.*

# SHERA Application Claim Examples (2 of 2)



## CLAIM NOT YET SUBMITTED

Owners are encouraged to review each claim prior to submission to determine if the household is eligible for the additional months of assistance.

### EXAMPLE

*A property manager was preparing to submit tenant claims in the SHERA Portal for April 2020 thru March 2021 arrears. Now that the new policy is effective on July 1, they are reviewing the tenant arrearages from April – June 2021 sending an opt-out notice to each household, and updating the tenant claims accordingly to include arrearages from April 2020 thru June 2021.*



## CLAIM ALREADY DENIED

Households with a SHERA claim that was denied under the initial April 1, 2020 – March 31, 2021 period may re-apply.

### EXAMPLE

*A claim submitted in the SHERA Portal was denied because the household was over 80% AMI. The household circumstances have changed (job loss), the household is now also behind on June 2021 rent. The owner/agent has collected monthly income documents (or a new recertification showing income loss) verifying income eligibility, and may submit claim(s) for the full arrearage amount.*

# Non-Eviction Commitment



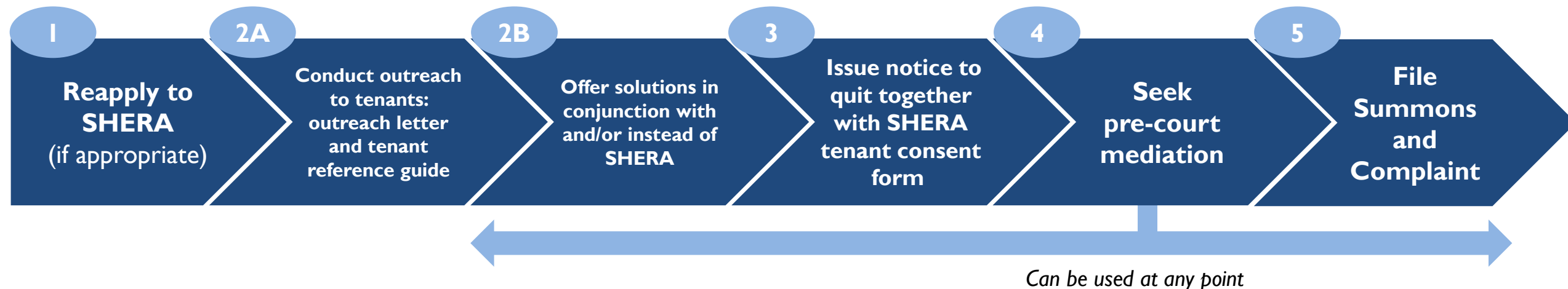
- If a household that **previously** received SHERA funds receives additional assistance for this extended benefit period, the six-month non-eviction commitment period will run for **six months from the date the last month's payment of the additional assistance is applied.**

<i>Examples of the non-eviction commitment for non-payment of rent</i>		
Last Month of Arrearage	SHERA payment applied to tenant account	Expiration of non-eviction commitment
June 2021	July 1, 2021	December 31, 2021
September 2021	October 1, 2021	March 31, 2022



# Resolution Steps for Non-Payment of Rent (All Households)

- As participants in the SHERA program, property owners are expected to attempt the resolution steps outlined below prior to filing a notice to quit (Step 3) or Summons and Complaint (Step 5) against any of their tenants for non-payment of rent. If resolution of the arrearage is achieved at any step, the sequence should not be continued.
- As a component of SHERA Owner Agreement compliance monitoring, DHCD may ask to review documentation demonstrating that owners pursued these resolution steps.





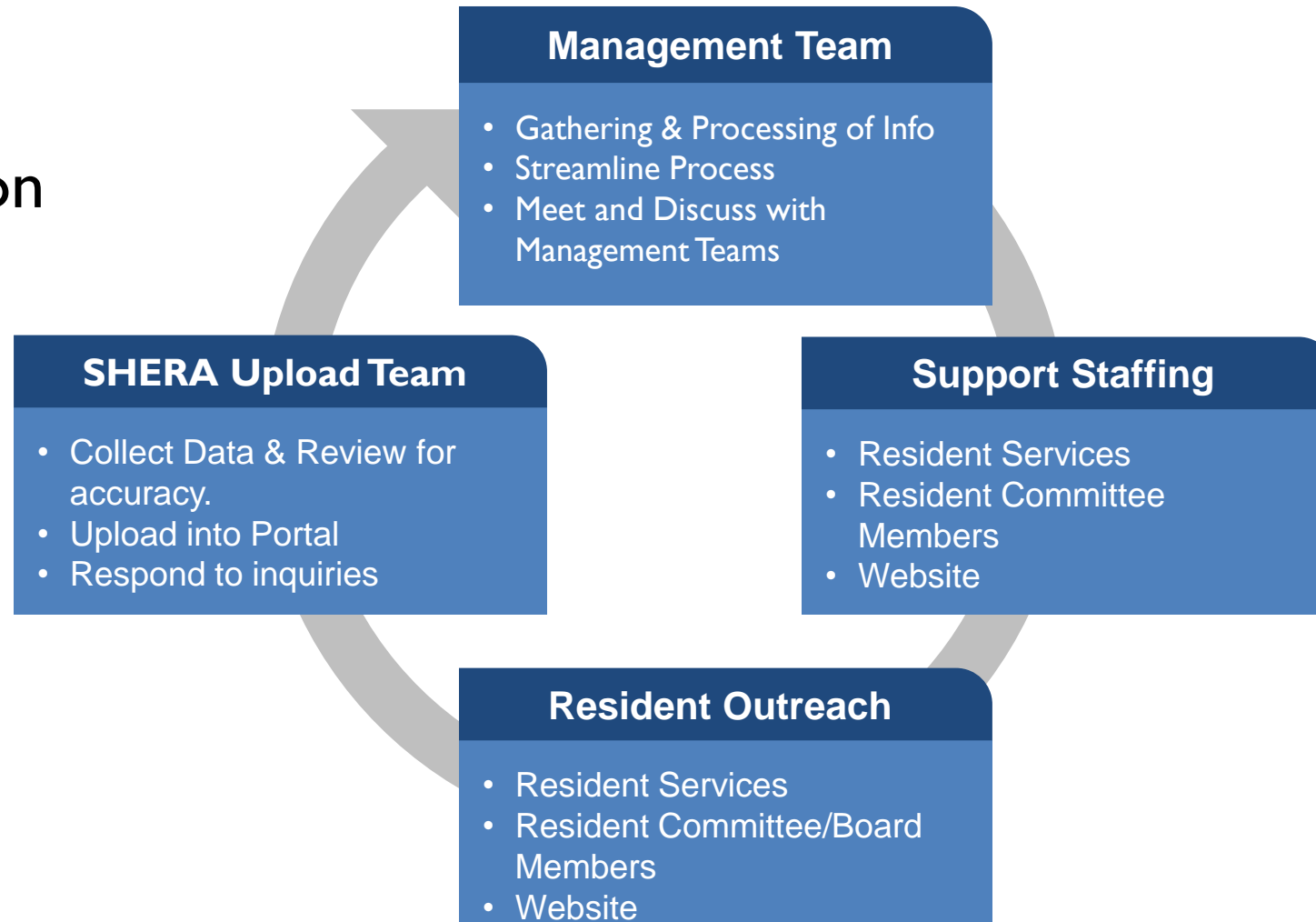
# QUESTIONS



# OWNER BEST PRACTICES AND BENEFITS OF SHERA



## Plan Of Action



*Robert Ortiz, Regional Property Manager  
UHM Properties LLC*

# Tools for Organizing Participation in SHERA



Nominate a Point Person



Maximize Tools like  
OneDrive, Google Docs



Centralize, Centralize, Centralize

- No matter your size!



Talk about the benefits

- To everyone!



Distributing roles:

- Property Manager
- Data Manager
- Accounting Manager
- Project Manager



*Julianna Stuart, Vice President, Community Impact  
Preservation of Affordable Housing*



## Importance of Tenant Outreach

- Letter tailored to the HA
- Hand delivered by RSC and/or Maintenance staff
- Website



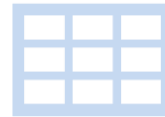
## Follow-up with qualified households who did not respond

- Mail the application to the Tenant
- If still no response, phone calls/emails to the Tenant



## 1 on 1 Tenant Meetings

- Schedule meeting with front desk
- Explain more of the process
- Go over the application
- Questions are answered



## Using the Excel Template (Entering/Uploading)

- Template is easy to use
- Save completed template and upload



*Carrie Moore, Executive Director  
Dedham Housing Authority*

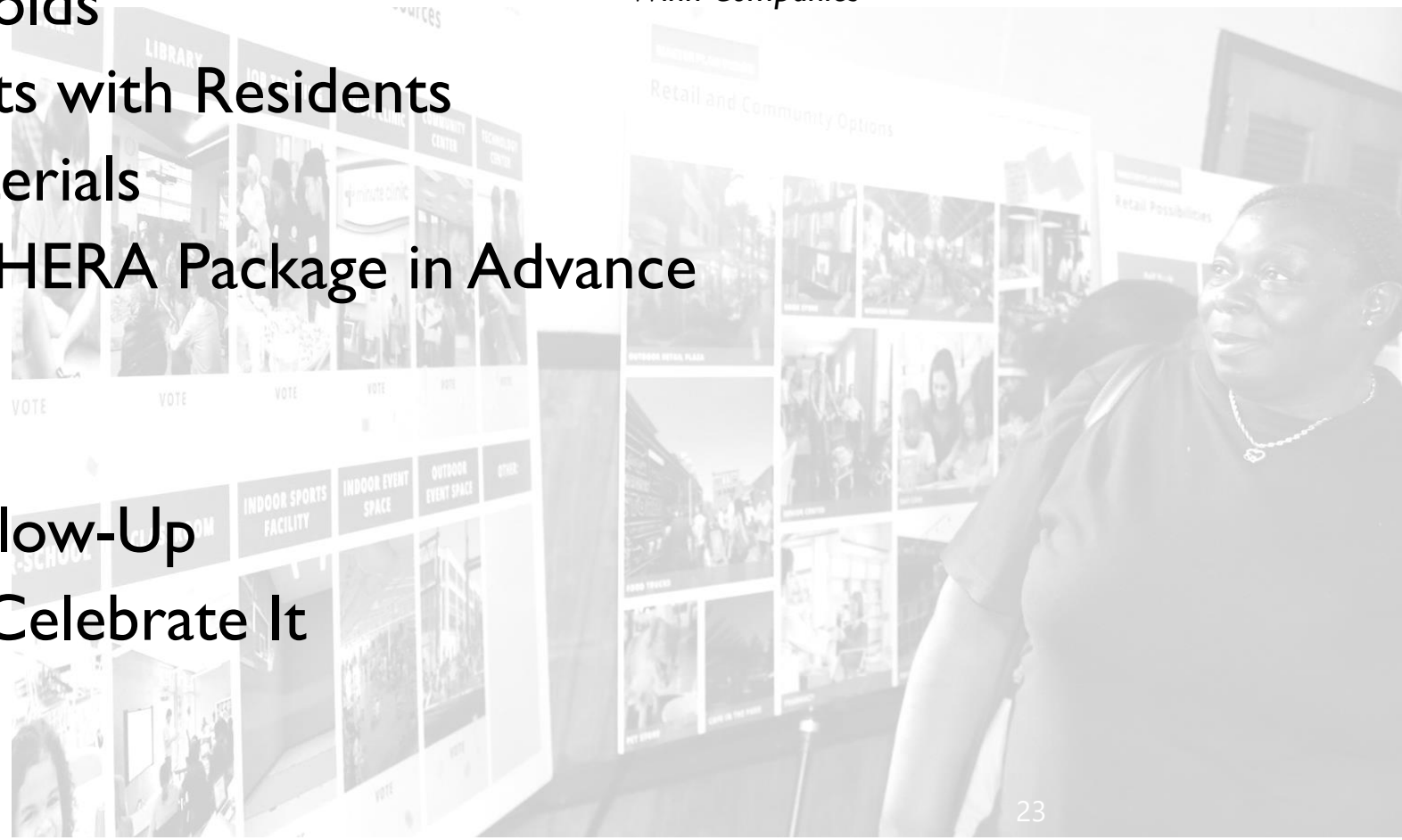
# SHERA: Effective Resident Participation



1. Create a Game Plan and Prep Your Team
2. Train Your Team
3. Focus on Eligible Households
4. Consider Your Touchpoints with Residents
5. Tailor Your Outreach Materials
6. Prepare the Household SHERA Package in Advance
7. Expand Your “TEAM”
8. Launch with Urgency
9. Be Consistent in Your Follow-Up
10. Track Your Progress and Celebrate It



*Trevor Samios,  
VP of Resident Services & Customer Experience  
Winn Companies*



# I. Create a Game Plan



**Create a game plan with each property team. Work to assign responsibilities that fit your property and team members.**






22:44

Request control

Recording has started. This meeting is being recorded. By joining, you are giving consent for this meeting to be recorded. Privacy policy

Dismiss

## 4. Portal Actions

-  **Register your property**  
Complete the W-9 & Direct Deposit
-  **Complete & Sign**
  - Owner Agreement
  - Compliance Certification
-  **Upload Applications**

WinnCompanies  
Development | Residential | Military

10

Meeting chat

9:54 AM Meeting started

Wallace, Brenda 9:57 AM  
love Charlotte, great shopping in the airport

Recording has started

Wright, Rena A. 10:06 AM  
Will the extension be 18 months from 4/1/2020 or 18 months of arrears for the resident balance?

Thank you!

Last read

Wright, Rena A. 10:16 AM  
On the spreadsheet, what information should we put under "Unemployed Member 90 Day Prospect"? This is in column Y or Z.

LN  
Nash, Lynette C

JS  
Storozuk, Mich...

Stigliano, Je...

+40

+16172382...



## 2. Train Your Team



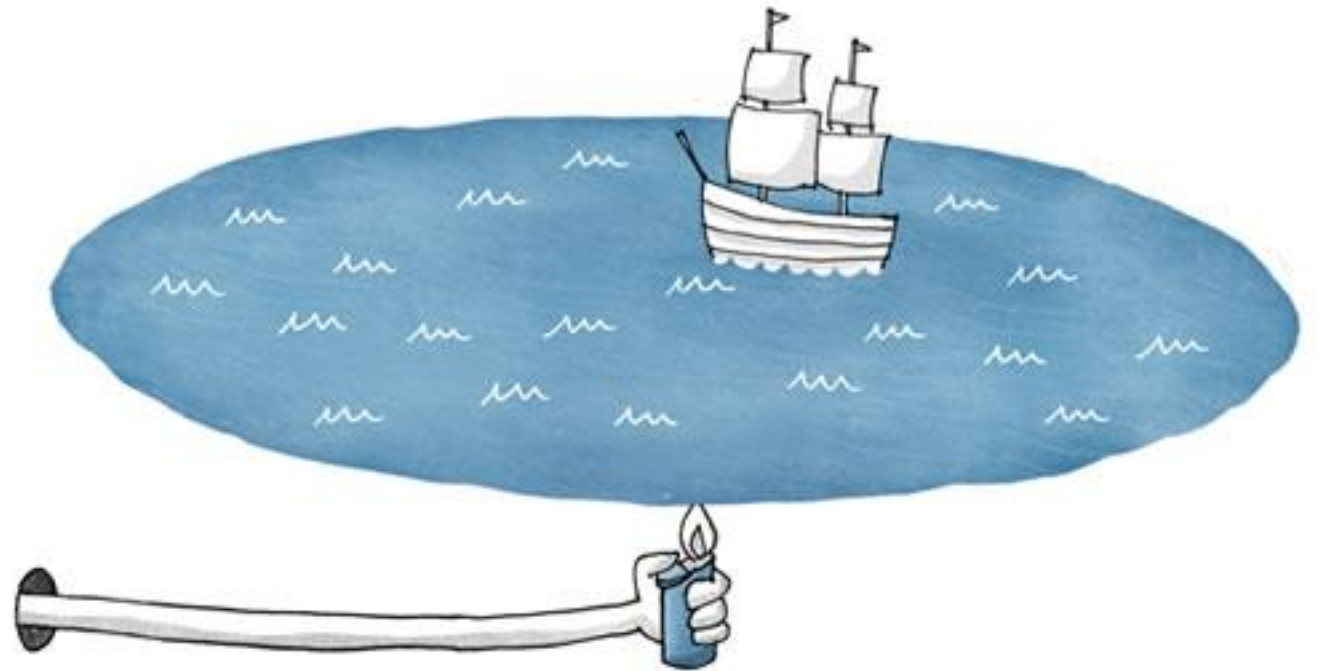
**Record the SHERA submission process using a test property, walking your team members what to do with the systems and tools your team is familiar with.**

A screenshot of a Zoom meeting interface. The main window displays a presentation slide titled "4. Portal Actions" with a green and blue header. The slide lists three actions: "Register your property" (with a registered trademark symbol icon), "Complete &amp; Sign" (with a pen icon), and "Upload Applications" (with a cloud upload icon). The "Complete &amp; Sign" section includes sub-points: "Owner Agreement" and "Compliance Certification". The "WinnCompanies" logo is at the bottom left of the slide. On the right side of the Zoom window, there is a video feed of a man, a list of participants with initials (LN, JS, etc.), and a "Meeting chat" panel showing messages from participants like "Wallace, Tereza" and "Wright, Rima A.". At the top of the Zoom window, there are controls for "Request control", "Recording has started", and "Leave".

### 3. Focus on Eligible Households



**Don't try to boil the ocean.  
Remember you are  
focusing on eligible,  
delinquent households.**





## 4. Consider Your Touchpoints with Residents

Once you've narrowed your focus to eligible households, identify the best way to communicate, reach out, and gather needed documentation. What are your touchpoints with residents? When are you likely to see hard-to-reach residents? How can these instances best be leveraged to support SHERA engagement?

- **Rent Payment**
- **Work Orders**
- **Recertifications**
- **Inspections**
- **Community Programs & Events**
- **Wellness Checks**

**Be Persistent!**



## 5. Tailor Your Outreach Materials



- Once you've identified each eligible household, consider **PERSONALIZING** your outreach, letting the household know **THEY** are eligible for this unique opportunity and support is just a phone call away. Create a **“script”** each team member can use when speaking with residents.

Dear \_\_\_\_\_

We know that many residents have struggled during the COVID-19 crisis, and so we are excited to tell you about a new program that can help. If you have fallen behind on your rent because of COVID, we can apply for emergency aid to pay the rent that you owe. This rent would be paid directly to your landlord or property manager through the Subsidized Housing Emergency Rental Assistance (SHERA) program that is funded by the federal government. We will need your assistance and permission to apply for these funds.

You may be eligible for this rental assistance if:

- Your income is below the program limit;
- You owe rent that was due between April 1, 2020 and March 31, 2021; and
- You have lost income, and/or had a significant increase in expenses, because of COVID-19.

You will need to sign a sworn statement saying that this is true.

As your (landlord or property manager), we will help you figure out whether you are eligible for the program and what documents may be necessary. For example, you may also need to provide proof of your household income.

If you are eligible, the program may be able to pay 100% of the rent you owe for the months from April 2020 through March 2021. It is not yet certain if any additional rental assistance will be available through this program, although it is possible. You should plan to continue to pay your rent currently unless you have made specific arrangements with us to do otherwise.

**Please contact your property manager at \_\_\_\_\_ to find out more about whether you are eligible for help through SHERA.**

If you are not eligible for SHERA funding based on the program guidelines, we will discuss other options to help with paying any overdue rent.

Sincerely,

\_\_\_\_\_  
Owner or Property Manager

## 6. Prepare the SHERA Package in Advance

- Prep your upload spreadsheet with all known information. Highlight what's missing!
- Gather all required, known documents **BEFORE** reaching out to households to review their eligible balance, gather outstanding information, and ask for consent/signature.
- Pre-populate the **Tenant Certification** with information you already know about the household and their eligibility.
- Create a **SHERA package** for each eligible household so information is easily filed after review/consent/submission.

### SHERA Resident File Checklist





Site Name / #	
Household Name	
Unit #	


Required Paperwork Prior to Submitting Application via SHERA Portal

- SHERA Tenant Certification of Rental Assistance Eligibility**
  - Review/Complete with Resident
  - Obtain Resident Signature
- Income Verification** (any of the below)
  - Documentation already provided for 2019, 2020, 2021 Recertification
  - Documentation of Benefits
  - Documentation of Monthly Income for 2 months prior to application

Application Tracking	
	Date Application Submitted via SHERA Portal
Approved Denied	Application Decision
	Date Application Approved
	Date Application Funds Received

For a household to be eligible for assistance through SHERA, the following criteria must be met:

-  Rental arrears must be between April 1, 2020 and March 31, 2021
-  The household has experienced a financial hardship due to COVID-19
-  The owner can demonstrate the renter household has eligible rental arrearages
-  The household has income at or below 80% Area Median Income (AMI)



1 of 1

## 7. Expand Your “TEAM”



### WHO CAN BE PART OF YOUR SHERA TEAM?

- **Maintenance Staff**
- **Resident Services**
- **Community Partners**
- **Residents who have already participated**
- **Legal Counsel**
- **RESIDENT LEADERS**

**Get the word out through all channels and make sure your team is informed/engaged!**





## 8. LAUNCH With Urgency



- **SHERA** offers an incredible opportunity for owners, operators and residents alike.
- Make an “event” or “blitz” of your SHERA kick-off. Be Creative.
- Create SHERA posters and advertise the program in common areas, elevators, stairwells, fitness rooms, etc. Let folks know what’s available to them.
- **CREATE URGENCY**
- Be consistent with regular communication through multiple channels for hard-to-reach households.



## 9. Be Consistent in Follow-Up



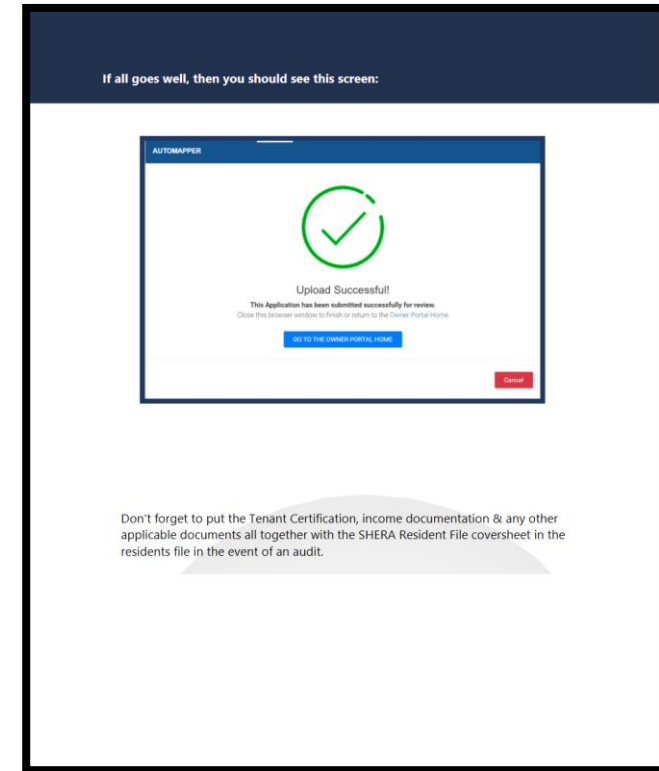
**Create a household follow-up schedule and be consistent with it, tracking each time you reach out.**

	Check All That Apply	Attachment (Check all that Apply)	Date/s of Outreach		
Late Rent Notice (5 <sup>th</sup> of the Month)	<input type="checkbox"/>	<input type="checkbox"/>			
Interim Recertification Offered (If Applicable)	<input type="checkbox"/>	<input type="checkbox"/>			
Hardship Verification Completed	<input type="checkbox"/>	<input type="checkbox"/>			
Payment Agreement Offered	<input type="checkbox"/>	<input type="checkbox"/>			
ERAP Rental Assistance Offered	<input type="checkbox"/>	<input type="checkbox"/>			
Notice to Quit (10 <sup>th</sup> )	<input type="checkbox"/>	<input type="checkbox"/>			
Attorney Letter (25 <sup>th</sup> )	<input type="checkbox"/>	<input type="checkbox"/>			
<b>Additional Outreach:</b>	<input type="checkbox"/>	<input type="checkbox"/>			
Phone Call	<input type="checkbox"/>	<input type="checkbox"/>			
Letter	<input type="checkbox"/>	<input type="checkbox"/>			
Email	<input type="checkbox"/>	<input type="checkbox"/>			
Emergency Contact Notified	<input type="checkbox"/>	<input type="checkbox"/>			
Door Notice	<input type="checkbox"/>	<input type="checkbox"/>			



# 10. Track Your Progress and Celebrate It

- **Create a tracking tool your teams can use to monitor which households have been submitted to SHERA and which remain outstanding.**
- **Track submissions, approvals and payments.**
- **Celebrate your teams and their hard work in helping to promote housing stability.**



Resident_Portion_Rental_Arrears_Due_November_2020	Resident_Portion_Rental_Arrears_Due_December_2020	Resident_Portion_Rental_Arrears_Due_January_2021	Resident_Portion_Rental_Arrears_Due_February_2021	Resident	Confirm Resident has signed the required document	Total Submitted	Date Submitted	Status: Approved, Denied or Canceled
100	100	100	100	100	100			
928	1283	1283	1283	1293	1283	yes	\$6,070.00	5/10/2021 approved
0	0	0	0	0	870	Yes - will be submitting today		
0	0	0	0	124	670	Yes - will be submitting today		
0	0	0	0	48	112	Resident will pay balance-Doesnt want to sign		
0	116	238	238	238	238	resident coming in to sign paperwork		
0	0	0	0	77	304	Yes - will be submitting today		
0	0	0	0	0	590	Yes - will be submitting today		

# Best Practices to Submit an Application on SHERA Portal (Importing unit / tenants and using Excel File Template)

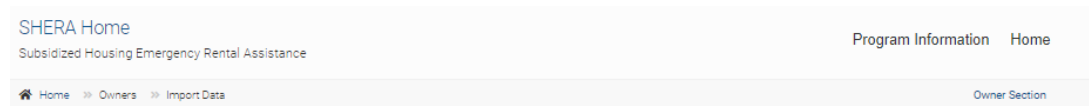


## When registering your property(ies),

- Enter the **Project ID number** you receive with the invitation to participate. Enter the owner's Tax ID. **BE SURE TO USE THE DASHES WHEN ENTERING BOTH.**
- Direct deposit information must match your **bank records**
- Your **W-9** information must match your **Federal Tax Classification** with the IRS

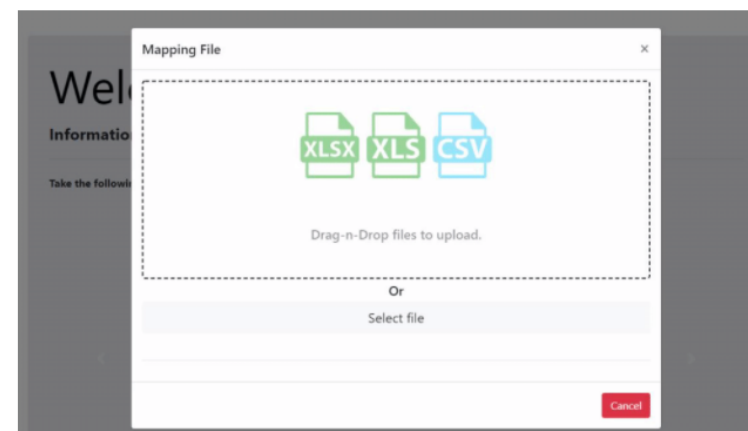
## When submitting an application

- Download the Excel template from the main Import Data screen and complete required information for each tenant. **OR** you can design a report from your property management software and import that report directly. (.xls, .xlsx or .csv files).
- **Note:** Import is easiest if you match the data field names exactly and follow data field formatting instructions, e.g., do not use any formulas, make sure date fields are correct.



### Import Data into the Owner Portal

Follow these steps to upload your tenants information. For this process, you can use your own template or excel file. You can also use [this Excel File Template](#) for your convenience.



1. UPLOAD FROM YOUR COMPUTER A .CSV, .XLS OR .XLSX (SPREAD SHEET) DOCUMENT.

START MAPPING

**NOTE:** The [Excel file Template \(SHERA Application Data Fields\)](#) is also available for download on the SHERA Program Information Page. Users should reference the [Instructions SHERA Application Data Fields Reference Guide](#) for full instructions on completing the template.



# COMMUNITY MEDIATION

# What is Community Mediation? (and what it isn't)



*Trained mediators can help landlords and their tenants find a workable solution for everyone*

Mediation is a **voluntary** and **confidential** process facilitated by a **neutral** third party (the mediator) who prioritizes self determination and informed consent of the parties to reach a mutually agreeable outcome or progress towards one.

## ***It is not:***

- Adjudicatory: the mediator does not take sides, make recommendations or direct the parties
- A reluctant compromise: parties find out what is most important to them and how best to achieve it

# Why Should I Choose Community Mediation?



**Free** and faster alternative to court action

- 100% of participants surveyed thought the process was fair
- 388 cases handled (November '20 - April '21)

High rate of success

- Settlement rate 79.8% of closed cases

No tenant income eligibility limit for services

- Available to all community members and at any stage in process

Allows for flexible and creative outcomes

- 95.35% satisfied with how their problem was handled.

Can help with ongoing communication or relationship issues

- Mediation participant – *"I have other summary process matters pending with the Court and will advise the clients to pursue mediation to resolve the dispute."*

# How to Access the Housing Mediation Program



**Mediations can be held by phone, online via Zoom or in-person at some Centers**

Visit [www.resolutionma.org/housing](http://www.resolutionma.org/housing) to learn more.





# QUESTIONS



# RESOURCES & SUPPORT





# Registering for SHERA



If you have received an invitation for your property(ies) with a project ID for said property, **you can register and submit claims** on the SHERA Portal!



If you have **not** received an invitation for your property(ies) with a project ID...

- Be on the lookout for an **invitation to pre-screen your property(ies)** for SHERA eligibility
- Once approved, you will receive **property ID** and YOU can register and submit claims on the SHERA portal!

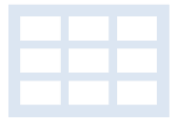


After you submit your eligible claim(s) you can expect emergency payment / relief within approximately **3 weeks!**

# SHERA PROGRAM OVERVIEW & BENEFITS



The **Subsidized Housing Emergency Rental Assistance (SHERA) Program** is a federally funded emergency housing assistance program for renters impacted by COVID-19. The Massachusetts affordable housing owner and property management network can help residents pay COVID-related rent arrears from April 1, 2020 to September 30, 2021.



## BULK UPLOADS



## RESPONSE RATE



## INCOME CERTIFICATION



## EVICTON DIVERSION PLEDGE

**DHCD in partnership with MassHousing and Massachusetts Housing Partnership (“MHP”)**



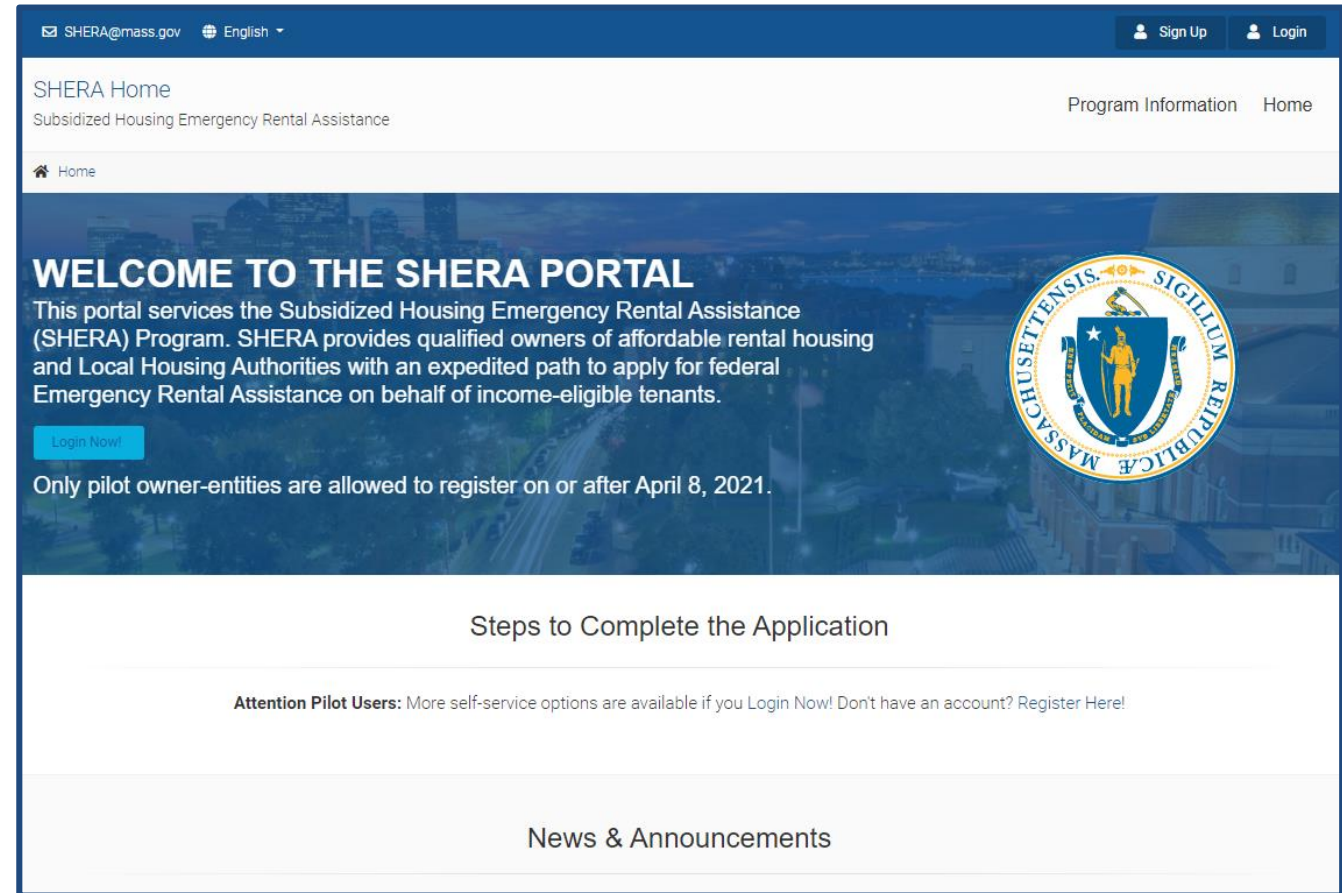
## RESOURCES

- Review materials on the SHERA Portal Program Information tab <https://sherafunding.mass.gov/>
  - SHERA Policy Guidance
  - SHERA Notification to Tenant Instructions and Form Letters



## SUPPORT & QUESTIONS

- After reviewing the materials, if you have questions related to SHERA, please [submit a support ticket](#) on the Portal.





# THANK YOU!

