

Re-Housing Plan (Monthly)

Through this monthly form, you and your case manager (CM) or housing search worker (HSW) will create a personal, step by step plan for you to find and keep stable housing.

How do you feel about your progress in finding your new home?

☹️

1

○

2

○

3

○

4

○

5

😊

How do you feel about your progress in saving money?

☹️

1

○

2

○

3

○

4

○

5

😊


To support your success, each adult in your family is required to spend 30 hours/week on the activities in this plan.		
Look at last month's plan. What did you accomplish? (*List any incomplete actions with a new completion date*).	What actions will I take this month? (For next meeting, how will you report back on each action, what documents will you bring?)	What resources or referrals do I need? (Include specific referral contacts)
🏠 Finding My New Home	<div><input type="checkbox"/> Update my Housing Search Log and bring it to next month's appointment</div>	
📈 Long Term Success: Saving 30% of Net Income		

Name:

Month/Year:

## Re-Housing Plan (Monthly)

**Other Key Areas:** In this section you will choose other areas to work on that are important to your success finding and keeping stable housing. Examples: Credit Repair, ESOL or other classes, Career Center, Childcare vouchers, CORI sealing/legal services.

Look at last month's plan. What did you accomplish? (*List any incomplete actions with a new completion date*).	What actions will I take this month? (For next meeting how will you report back on each action, what documents will you bring?)	What resources and referrals do I need? (Include specific referral contacts)
 <b>Meet weekly with my Case Worker</b>		(Include name/contact if case is reassigned to a new Case Worker)
<b>Other Goals</b>		

**I will complete the actions I agreed to in this plan. I will complete additional tasks that I agree to in Weekly Meeting Task Sheets this month. I understand each person 18 and older must spend 30 hours per week on the activities in this plan to help find stable housing** (unless I have another amount of time approved by staff for reasonable accommodation of a disability or good cause).

I understand that the Re-Housing Plan is a work in progress and that I must work with staff to update it monthly. I understand that this work on my Re-Housing Plan is required to remain in shelter.

**Date and Time of next Rehousing Plan meeting:** \_\_\_\_\_

**Participant Name:** \_\_\_\_\_ **Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**CM Name:** \_\_\_\_\_ **Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**HSW Name:** \_\_\_\_\_ **Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

Name:

Month/Year:

## Re-Housing Plan (Monthly)

**Examples:** Use the examples below to help brainstorm ideas with your Case Manager or Housing Search Worker of how to meet your goals. These are only examples. Your plan will be unique to you.

Look at last month's plan. What did you accomplish? (*List any incomplete actions with a new completion date*).	What actions will I take this month? (For next meeting how will you report back on each action, what documents will you bring?)	What resources or referrals do I need? (Include specific referral contacts)
<b>🏠 Finding My New Home</b> <ul style="list-style-type: none"> <li>Completed: Submitted CHAMP Application</li> <li>Did not complete: Reaching out to aunt in TX &gt;&gt; This month: Will call aunt on Thursday (2/22) and email progress report.</li> </ul>	<ul style="list-style-type: none"> <li>Complete the CHAMP application. <i>Follow-up: Bring confirmation email*</i></li> <li>Contact 7 landlords and complete a minimum of 4 housing applications. <i>Follow-up: Bring the housing search log to weekly check-in</i></li> </ul>	<ul style="list-style-type: none"> <li>Landlord leads list – names/phone #s</li> <li>Employment Services- name/email</li> </ul>
<b>Long Term Success:</b> <b>💰 Saving 30% of Net Income</b> <ul style="list-style-type: none"> <li>Completed: <ul style="list-style-type: none"> <li>Brainstorming budget items</li> <li>Opened bank account</li> </ul> </li> <li>Did not Complete: Creating budget <ul style="list-style-type: none"> <li>This month: Will send budget by Friday (3/7)– will email for help if needed</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Client will create budget using template <i>Follow-up: Bring completed template</i></li> <li>Client will reduce food/clothing expense <i>Follow-up: Share results from pantry visit</i></li> <li>Client will open passbook savings account and begin weekly deposits in the amount of X\$ starting every Friday this week. <i>Follow-up: Bring account info</i></li> </ul>	<ul style="list-style-type: none"> <li>Budget template provided</li> <li>List of Food Pantries + clothing resources provided</li> <li>Client chose a bank, no referral needed</li> </ul>
<b>Example Other Goal:</b> <b>Get CORI sealed/Work with legal services</b>	<ul style="list-style-type: none"> <li>Client will contact legal services to complete an intake for CORI sealing services. <i>Follow-up: Share progress</i></li> </ul>	<ul style="list-style-type: none"> <li>Legal Services- name/phone #</li> </ul>
<b>Example Other Goal:</b> <b>Find a Job to Increase Income</b>	<ul style="list-style-type: none"> <li>Meet with employment specialist to complete intake <i>Follow-up: Bring any documents given</i></li> </ul>	<ul style="list-style-type: none"> <li>Employment Services- name/ phone # to follow up.</li> </ul>
<b>Example Other Goal:</b> <b>Get Childcare</b>	<ul style="list-style-type: none"> <li>Call DTA to follow up with childcare voucher eligibility. <i>Follow-up: Share about outcome, bring any emails provided.</i></li> </ul>	<ul style="list-style-type: none"> <li>DTA worker – name/phone # to follow up on childcare voucher.</li> </ul>

**These are only examples. Your plan will be unique to you.**

Name:

Month/Year:

Page:



## Housing Search Log

Please record your progress searching for a new home here and bring this document to your next meeting. Make copies of this as needed.

Date of Contact	Apartment Address	Outcome of Contact	Landlord Name	Contact #	Next Step
3/7/23	Example: 1 Main St Fall River, MA	Landlord requesting first month, last month and security deposit. Credit score of 620 or better. No evictions on record.	John Smith	555-5555	
3/7/23	Example: 5 Swan Ln. Fall River, MA	Unit is available. Landlord not familiar with HomeBASE, has questions. Wants all to fill out application. Can schedule a viewing if interested. Rent is \$1450 for 2-bedroom hot water included.	Jane Smith	545-5555	Complete application, ask Housing Search Worker to call landlord to explain HB

Name:

Month/Year:



## 30% Saving Calculator

Use this worksheet to calculate your required monthly savings amount while you live in EA Family Shelter. Remember to include income for ALL family members.

1

### Calculate Your Monthly Household Income

Your Family's Net Wages (after taxes)	\$
TAFDC/TANF <sup>1</sup>	\$
Unemployment Benefits	\$
SSI or SSDI <sup>2</sup>	\$
Child Support	\$
EAEDC – Cash Benefit <sup>3</sup>	\$
Pension + Retirement	\$
Other: Child Support, Veterans Benefits, etc.	\$
<b>TOTAL Family Net Income</b>	\$

2

### Calculate Your Family's 30% Saving Amount

#### Why do you have to save 30% of your income?

Our goal is to set you up to be able to pay your rent every month.



$$\underline{\hspace{2cm}} \times 0.3 = \underline{\hspace{2cm}}$$

Total Family Net Income (see section 1)      30% Monthly Savings Amount

<sup>1</sup> Transitional Aid to Families with Dependent Children/ Temporary Assistance for Needy Families

<sup>2</sup> Supplemental Security Income/Social Security Disability Income

<sup>3</sup> Emergency Aid to the Elderly, Disabled and Children

3

### Do you have debt that could stop you from moving?

There is only one type of expense you can deduct from your required savings: payments towards debts that, if you didn't pay them, could stop you from moving into another home. Examples: overdue utilities and back rent.

#### Calculate your monthly payments towards these debts

Monthly Payment on Utility Debt	\$
Monthly Payment on Rent Debt	\$
Monthly Payment on Other Relevant Debt*	\$
<b>TOTAL Monthly Debt Payments</b>	\$

\*All debts must be approved by your Case Worker or Housing Search Worker as preventing you from moving.

4


### Finalize your Family's Monthly Saving Amount

$$\underline{\hspace{2cm}} - \underline{\hspace{2cm}} = \underline{\hspace{2cm}}$$

30% Monthly Savings Amount (see section 2)      Monthly debt payments (see section 3)      **Family's Final Monthly Saving Amount**

Weekly Task Sheet

Use this sheet to capture any additional action items agreed on in your weekly case management meeting.



TO DO:

What I need to do before my next case management meeting on \_\_\_\_\_:


Participant Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

CM Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_