SHERA Best Practices and Tips from Pilot Owners

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About this Guide

This Subsidized Housing Emergency Rental Assistance Program (SHERA) Best Practices Guide has been developed from the feedback shared by SHERA Pilot participants. There was a "soft launch" (Pilot) of the SHERA program with 10 private and public owner/property manager participants representing geographic and property type diversity. Pilot members have applied to the program through the SHERA Portal system (Portal) and volunteered to be part of an owner working group to make program improvements before the program launching.

This guide represents the best practices, tips and lessons learned from these owners and property managers. We want to thank and acknowledge all the pilot participants who contributed to this document and the SHERA Program:

- Acton Housing Authority
- Beacon Communities
- The Caleb Group
- Chelsea Housing Authority
- East Boston CDC
- Maloney Properties
- Peabody Properties
- POAH Communities

- UHM Properties
- Winn Companies

Getting Organized for SHERA

Plan on at least **two weeks** to get organized and set up the internal processes to support applying to SHERA.

Steps to get Organized

- Review all SHERA Program/Policy materials
- Create a **work plan**
    - Identify and empower key staff person
    - Determine what is centralized/done at the site level
    - Keep a centralized list of properties and ID numbers, as well as staff assigned to SHERA for each property
    - Determine how the application spreadsheet will be populated; some have had a software vendor build a report that can be exported directly from the property management accounting system (in .xls, .xlsx or .csv format)
    - Consider phasing
        - **Registration process** – consider completing a week prior to submitting an application; complete at the corporate/central office level
        - **Application process** – submit property applications weekly as individual tenant claims are completed
        - **Prepare materials** on commonly used property or company letterhead, (e.g., communications to tenants)
        - Schedule **tenant outreach strategy**
            - **First**: Send Outreach Letter and SHERA Tenant Overview Reference Guide to eligible households
            - **Second**: Create and execute a follow-up plan including phone calls (texts), knocking on doors, and/or using social media (Facebook posts)

Implementation Tips

- Develop and deliver staff training on the program, the documents and the Portal
    - DHCD/MH/MHP webinars are available at https://www.mass.gov/info-details/subsidized-housing-emergency-rental-assistance-shera-program-for-owners?n#shera-webinar-/-training-materials-
- Owners and property managers (Owners) are encouraged to explain the relative simplicity of the SHERA program for participating tenants and the faster turnaround time for approval. compared with other emergency rental relief programs. SHERA is not as complicated for the tenant as other programs; there is not as much follow up required by Owner and, in many cases, the tenant does not need to complete a new income certification (unless they have project-based rental subsidy and are recertifying based on ongoing reduced income)
- Plan on two to three weeks to complete tenant outreach and collect all information required for a tenant claim
- Plan to implement all rent arrearage applications over a few months, not all in the first few weeks

Centralizing vs. Decentralizing the Process

Owners may choose to centralize or decentralize the process to apply to SHERA based on size, capacity or workflows.

However, Pilot owners recommended that, if you have the capacity, it's best to centralize certain components of the process. Here are some examples owners have taken to prepare applications to SHERA:

- **Registration** – *centralize* this process. Gather all of the data ahead of time, and keep track of the properties, the property ID and tax IDs, and what staff will register in the system for which properties. One organization had all applications go through a single staff person; others have distributed more of the system interaction to site managers. In all cases, Pilot owners and managers recommend central management of the site list and key identifiers.
- **Applications/Uploads** –*decentralize* this process. While some organizations did uploads centrally and others had site managers complete this task, almost all recommend passing the information by site managers for review, since the site managers are the most intimately familiar with the tenants and their situations. Gathering tenant consent forms almost certainly needs to be done at the site level (although the tenant certification forms are electronically fillable and signable, so remote submission is possible). ***Consider providing internal support and training for site-based teams***.
- **Owner Agreements & Compliance Certifications** – *Mixture of centralized and decentralized*. Third-party managers may need to obtain their clients' approval to sign on their behalf (if such approval is not already authorized through a management agreement). Where property managers are signing on behalf of an owner, you may wish to use this approved format: (*First name last name, authorized management agent for {Owner Name}*) when signing. Again, ***consider providing internal support and training for site-based teams***.

Templates

- Create one template for uploading data to the Portal and utilize the same template across properties. Some owners have chosen to cut and paste information into the Excel template provided for upload (found on the SHERA Program Information Page); others have created reports from their accounting system and uploaded those reports directly. In either case, be sure to use the exact field names from the Excel template for easiest upload.
    - Pre-populate the template with as much data as possible from your Property Management software. That way, property staff are only responsible for spot checking, rather than uploading all resident information. Have all of the columns listed as they are on the Portal so the mapping would be smooth
    - If creating reports from a different system, be on the lookout for subtle differences between fields as represented in that system and in the SHERA template. For example, one pilot owner's system extracted DOB as Month/Year instead of Month/Day/Year.
    - Be sure that the data you upload in the Portal follows the application format requirements and does not include any embedded fields; for example, do not include any formulas in the template. This will result in an "error" when attempting an upload.

- Some owners created their own forms to keep track of tenant applications, which resident consent forms have been collected, and when each tenant claim is submitted through the portal.
- Some may choose to include additional central locations to store important documents that would be needed. For instance, some owners and managers have used SharePoint, OneNote or other document management systems to enable property managers to access W-9's and direct deposit information.

Assign One Uploader

Some groups have designated one central person or team to be responsible for completing the upload in the SHERA portal for all applications. This helped to ensure that any data issues could be addressed and edited on subsequent submissions and empowered one or two contacts to troubleshoot issues.

Use Document Sharing Tools

Utilize document sharing tools like OneDrive, SharePoint, and/or Google docs to have one shared submission template per property. This allows staff to view the same document, and make updates and edits in real time to data that is shared centrally.

Tenant Support

A key element of the SHERA Program's design is for owners to seek and offer tenants potential solutions for rental arrearage beyond just SHERA. This section contains tips from SHERA pilot owners and partners for providing this broad tenant support.

Note: These are recommendations, not requirements. Certain minimal requirements for tenant outreach and support that owners must attempt before issuing a notice to quit or summons and complaint for non-payment are detailed in the Non-Eviction Commitment section of the SHERA Policy and Program Overview.

Support Strategy

The two components of tenant support described by pilot owners are **outreach/education** about resources and direct **intervention** to facilitate tenants' access to resources. Best practice tips for each are summarized below:

Component	Overall Goal	Tips
Outreach/ Education	Each household **knows** their rights, responsibilities, and resources	• Keep up-to-date on the different resources available to tenants (e.g. SHERA, ERAP, local sources of rental assistance) • Use multiple techniques to reach tenants (letters, phone calls, knocks on doors, after hours/weekend meetings) • Use multiple staff to reach tenants (a team approach between property management and resident services) • Frame messaging positively, e.g.: "While your outstanding rent is your obligation, we may be able

		to help; you may be eligible for rental arrearage relief" • Notices to Quit may have limited effect, with tenants perceiving or treating them equivalently to the monthly rent bill • If, after engaging in appropriate tenant outreach and support, it becomes necessary to file for eviction, inform eviction attorneys about SHERA and ask that they refer tenants to their property manager or service coordinator for more information. ○ Attorneys should be informed of SHERA Non-Eviction Commitment policies, including the 6-month protection from eviction for eligible households which received SHERA
Intervention	Each household has efficient and expedient **access** to resources	• Partner with Housing Consumer Education Centers, voucher administrators, etc. to facilitate tenants' access to resources • Assist tenants with applications for assistance • Offer internal assistance such as retroactive interim recertifications, affordable payment agreements, etc. • Integrate financial coaching into the resources available to tenants

Another tip from the pilot group is that the following two core principles can help make all forms of tenant support more effective:

1. Conduct outreach and offer resources as **upstream** as possible, before problems grow
2. **Set specific goals** each year for tenant support activities and outcomes to focus the organization's housing stability efforts and build rapport and trust with tenants

Pre-Court Mediation

A key resource among upstream interventions is pre-court mediation. In the mediation process, a neutral third party helps the property owner and the tenant identify flexible solutions that work for everyone. Advantages of mediation include:

- High rate of success in reaching agreements
- Agreements reached through the collaborative mediation process have better rates of compliance
- Allows for flexible solutions
- Can help with ongoing communication or relationship issues

Mediation is most effective when begun early: it is recommended to seek mediation before "issues" become "problems," so to speak.

Through the Eviction Diversion Initiative, the Housing Mediation Program offers **free** community mediation for landlords and tenants statewide. There are no income eligibility limits. For more information about the program, see resolutionma.org/housing, or to find your local Housing Mediation Program provider, visit hedfuel.azurewebsites.net.