



**FY2021 Continuum of Care
Renewal Project Application**

Agencies that apply for funds through the CoC Funding Process must complete an application for each program in E-snaps. In addition, agencies must complete this Renewal Project Application for each program.

This form is due on **October 4, 2021 at Noon** by e-mail to hsc@cityofmadison.com. **Late or incomplete applications will not be considered. Please do not wait until the deadline to submit the application. No grace period will be granted.** If you have questions, please contact Torrie Kopp Mueller, tkoppmueller@cityofmadison.com or call 608-266-6254.

Agencies with more than one CoC project must submit a separate form for EACH project.

Agency Name	Housing Initiatives, Inc.
Project Name	Permanent Housing for the Chronically Homeless (PHCH)

Project Contact Name	Brad Hinkfuss
Phone Number	608.620.1751
E-Mail	bhinkfuss@housinginitiatives.org

Funding Request	91,000
Proposed # of Units	16
Proposed # of Beds	16

Please answer the following questions:

Project applications will be reviewed based upon adherence to the HUD CoC Program Interim Rule, FY21 CoC NOFA, and FY21 CoC NOFA Policy Priorities, as well as results of the Project Performance Scorecard.

1. Describe the grantee's (and any sub-grantee's) experience in administering this type of program. Describe the qualification of the staff assigned to the proposed program, including their knowledge and experience.

Housing Initiatives, Inc. (HII) has a 28-year history of providing permanent supportive housing (PSH) for persons who are homeless and have severe and persistent mental illnesses. This mission speaks directly to multiple priorities within the Community Plan to Prevent and End Homelessness in Dane County, WI (2016). In short, the funds made available through Rental Assistance directly and exclusively support the homeless and mentally ill. HII achieves this primarily through the 151 units in 33 properties that the agency owns and operates within the City of Madison, scattered throughout the city. Clients are integrated into established neighborhoods at a more personal, non-institutional level. Clients have multiple opportunities to reach and interact with agency staff, who recognize when clients may be experiencing a mental health crisis. This facilitates quick intervention from experienced case worker staff from HII or other partner agencies that provide mental health services.

The cornerstone of HII's success is the staff and its experience administering the program and working with the clients they serve:

Bradley Hinkfuss: Mr. Hinkfuss has led the agency as Executive Director for the past three years. His diverse history includes leading many programs while working at Porchlight, Inc. for 16 years, as well as 2 years at Domestic Abuse Intervention Services, working in urban development in Illinois, and working overseas with the US Peace Corps in the construction of affordable housing. He currently serves as President of the Dane County Homeless Services Consortium.

Gayle Boushon: Ms. Boushon serves as the Director of Finance and Business Operations. She has a long history of working in public and private accounting firms. As a CPA with a long history in accounting, she also has extensive experience with the issues particular to non-profit organizations. The fiscal acumen she brings to the table helps HII manage its grants, finances and internal operations very effectively.

Director of Client Services (Currently hiring): The timing of this application just so happens to coincide with the hiring process for a new Director of Client Services. The person who just departed this position in September 2021 (Loreen Gage – MS, Human Services), built a solid team of case workers over a two-year period. That team is carrying on with supportive services unabated while HII hires a new director.

Mary Carrasco-Schoer: Ms. Carrasco-Schoer very recently joined the HII team as Property Manager. Although she is new to the agency, Ms. Carrasco-Schoer brings considerable experience in managing properties and clients that receive Section 8 and Section 42 tax credits. Her business acumen (MBA, BA, Real Estate) is further bolstered by many years of direct supportive service work with vulnerable and recovery populations.

Additionally, Housing Initiatives has three supportive services staff that collectively serve the Calypso Rd. Housing First project, as well as the broader array of scattered site PSH apartments:

Krishna Reategui-DeWitt (BA, MS – Social Work): Ms. Reategui brings a master's degree in social work, along with significant work with the Veteran's Administration Homeless Program. Additionally, she has worked in the psychiatric unit of local hospitals.

Kevin Scott (BS-Psychology): Mr. Scott comes to HII with several years' experience working in different capacities with Tellurian's Adult Residential Program which focuses on serving clients with co-occurring conditions of mental health and substance abuse.

Kevin McGettigan (MFA, BA): Mr. McGettigan has very extensive experience in working in the local mental health recovery system with the Dane County Care Center and Tellurian. As a Certified Peer Specialist and Recovery Coach, his years of experience add depth, expertise and knowledge of local systems to the HII services team.

The PHCH program fits and operates well under the larger umbrella of Housing Initiatives' programming, particularly the Rental Assistance program and the community-wide Coordinated Entry system. The original application included both acquisition funds for a building, and case management funds for 2 positions. It was instrumental in establishing a new campus of 2 buildings (15 units) with a dedicated case management office on-site. This renewal application is requesting only case management funds.

The program is currently in its fifth operating year, including the original three-year grant. It has proved a very effective model in providing stable housing to formerly homeless people coming directly off the Dane County Continuum of Care Coordinated Entry list. In the most recent reporting year, we had one client that left the program as a transfer to a partnering agency. All clients served at the PHCH project receive a rent subsidy through the Dane County Rental Assistance program.

2. Please describe how your project takes proactive steps to minimize or overcome barriers to housing retention.

HII has four FTE case workers on staff who work directly with any and all clients to support them in whatever it takes to retain their housing. This starts on day one, when clients who were literally homeless the day before meet with the property manager and a case worker to prepare to move in to their new PSH apartment. Identifying

potential issues at the time of move-in helps case workers devise service plans tailored to the unique needs of each individual. Based on individualized plans, HII staff work to build broader support networks around any client in need.

As part of their service approach, HII staff receive training to achieve accreditation to work with clients to register for additional services through Dane County Comprehensive Community Services (CCS). This opens another avenue for service provision by HII staff and many other agencies and service workers utilizing the CCS system.

In 2019, HII increased service worker staffing to four FTE positions for the first time. This staffing increase dramatically improved supportive service provision at all housing locations. The agency adheres to a Housing First approach, and supportive service staff employ a harm reduction model in providing client services. In doing so, they offer multiple options to help clients retain housing and improve their situation. Examples include direct support for emergent needs, personal service plans, flexible repayment plans, payee arrangements, and application to other community resources. The staff also engages in ongoing professional training, and actively collaborate with the broader Dane County and Madison homeless services network.

The extent of collaboration and networking with other supportive services agencies cannot be overstated. In particular, our supportive service staff work to build relationships with other support agencies in a never-ending quest to provide more targeted and effective services for HII clients. These services include supports such as in-home health care needs, AODA treatment, education, mental health care, crisis intervention, elder abuse support, domestic violence survivor support, probation & parole collaboration, and many more. With clients fresh out of homelessness – oftentimes for several years – and compounded with severe mental illness, it truly takes a collective effort to stabilize them and build long-term solutions.

3. In your last operating year:

a. How many households exited the program?

In the last operating year, 7 households left the program

b. Why did the households exit? (i.e. one was terminated from the program & one moved into subsidized housing & one was evicted):

Of the 7 households that left the program in the last operating year:

- ***2 Transferred to other permanent supportive housing options***
- ***2 lost eligibility due to extended incarceration/jail***
- ***1 left the program voluntarily and returned to homelessness***
- ***2 died***

c. If the participant(s) was evicted, please list the reason?

No evictions in the operating year.

d. Did the program attempt an agency transfer for any of the leavers? If so, what was the outcome?

Yes, one client transferred to a supportive institutional setting temporarily. That client eventually was then reaccepted to other permanent supportive housing with HII.

A transfer with a second client was attempted, but the client declined and decided to leave housing altogether by their own decision and returned to homelessness.

e. How many new households entered the program?

There were 3 new households that entered the program.

f. How many transfers were accepted into the program?

There were no transfers accepted during the operating year.

4. Was the program found to be in non-compliance with the Written Standards by the CoC from September 1, 2019-Present? If yes, describe the nature of the issue and how the issue has been addressed.

No, the program was not found to be in non-compliance with the Written Standards at any point from 2019 to the present.

5. Describe your agency's efforts to improve service quality and outcomes for the program. Please include how you solicit and incorporate feedback from program participants.

Over the past two years, HII has engaged in much more assertive outreach with all clients. This is done primarily through the supportive service staff reaching out to all clients to ascertain their well-being and potential need for new or different services. The start of the pandemic created the ideal setting to adopt this approach since our staff were temporarily restricted from meeting directly with clients in person, inside. HII also sent out multiple direct mailings to all clients to communicate information about the pandemic and HII support services. In addition, the Property Manager now sends out much more regular direct correspondence to update clients concerning their compliance standing, upcoming renewals, and any other matter of concern. The agency also maintains regular office hours with ample opportunity for clients to call, drop in, or make an appointment to meet with staff to discuss any issue. Collectively, these multiple avenues for soliciting and receiving feedback have resulted in the agency having much closer relationships with all clients. Ultimately this helps tremendously with service quality and outcomes since HII staff are learning about needs and problems proactively when they can still devise strategies to address them.

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6. What percentage of staff members working for this program identify as Black, Indigenous or a Person of Color? (Info only, to be scored in FY22)

For the last program year, 11% (1 of 9) staff members identified as Black.

7. How does this program work against systematic racism and other structures of oppression? (Info only, to be scored in FY22)

HII takes systemic racism and other forms of oppression very seriously. This is evident on the front end by the adoption and prominent display of policies embodied in the agency Affirmative Marketing and Tenant Selection Plan. This directive is carried out in part with our partner agencies, such as the Institute for Community Alliances that runs the Coordinated Entry program. HII is committed to taking new clients directly from Coordinated Entry or the Veterans Administration irrespective of race, nationality, or other protected classes. The agency is committed to taking new clients as they arrive, irrespective of personal attributes. To some degree the agency relies on the good efforts of its partners in selecting those clients.

At a systemic level, HII staff participate within the CoC to identify and address system-wide issues that may be furthering systemic racism, and then working with other partner agencies to meaningfully address those concerns. One such issue became apparent in the past year when a data analysis showed that a disproportionately low number of Black people were being housed relative to the total number of Black

people within the Coordinated Entry system. This resulted in a focused group to explore and adopt a different means of evaluating and making decisions about housing placements.

Internally, HII staff have engaged in all-staff meetings in which the staff discussed ways in which existing practices might have unintended racist effects and implications. Having such open discussions has been helpful in keeping the issue at the forefront of staff perspectives. It has also resulted in staff seeking out specific in-service training to help build best practices and an understanding of how racism potentially impacts clients by virtue of agency policies & practices. This is an ongoing training issue for HII.

8. How is this program and its practices culturally responsive to the population(s) who participate? (Info only, to be scored in FY22)

This program is culturally responsive to the participating populations by taking a highly individualized approach to each client. Since all clients at HII present with histories of chronic homelessness and severe mental health conditions, staff have developed an approach of building service and interaction plans with clients that are relationship-based, and that consider the mental health, physical health, trauma, cultural disposition, and behavioral history of each client. Cultural responsiveness is an integral component of this approach. Even so, staff are committed to making this an issue of ongoing training and policy development. They will continue to seek out training and educational opportunities, and look for ways to better integrate those practices into an approach that already strives to be culturally responsive.

Alignment with Housing First Principles

- 1) Please attach your agency and/or project written policies or procedures that **clearly demonstrate participants are NOT SCREENED OUT based on the following criteria**, and indicate the document and page number where the panel can find each provision.

Please Note: if a policy or procedure applies to all CoC-funded projects or agency-wide, you may submit one copy per agency. If you have different policies or procedures for different projects or project types, submit one copy of each relevant policy and specify to which project or projects each one applies.

	Name of Document/File	Page Number	Name of Project(s) (or "All Projects")
Having too little or no income	Housing Initiatives Handbook for Tenants and Clients (revised 2019)	13	All projects
Active, or history of, substance use or a substance use disorder	Housing initiatives Handbook for Tenants and Clients (revised 2019)	13	All projects
Having a criminal record *	Housing initiatives Handbook for Tenants and Clients (revised 2019)	13	All projects
History of domestic violence (e.g., lack of a protective order, period of separation from abuser, or law enforcement involvement)	Housing initiatives Handbook for Tenants and Clients (revised 2019)	13	All projects

*1A) Please note if there are specific criminal records the program denies for, what they are and the reason for denial.

- 2) Please attach your agency and/or project written policies or procedures that **clearly demonstrate participants are NOT TERMINATED from the program for the following reasons**, and indicate the document and page number where the panel can find each provision.

Please Note: if a policy or procedure applies to all CoC-funded projects or agency-wide, you may submit one copy per agency. If you have different policies or procedures for different projects or project types, submit one copy of each relevant policy and specify which project or projects each one applies to.

	Name of Document/File	Page Number	Name of Project(s) (or "All Projects")
Failure to participate in supportive services	Housing initiatives Handbook for Tenants and Clients (revised 2019)	14	All Projects
Failure to make progress on a service plan	Housing initiatives Handbook for Tenants and Clients (revised 2019)	14	All Projects
Loss of income or failure to improve income	Housing initiatives Handbook for Tenants and Clients (revised 2019)	14	All Projects
Being a victim of domestic violence	Housing initiatives Handbook for Tenants and Clients (revised 2019)	14	All Projects

Please provide any information that will give context to any areas project scored low on for performance.



Housing Initiatives, Inc.

Handbook for Tenants and Clients

June 2019

Housing Initiatives, Inc. 1110 Ruskin St., Madison, WI 53704

Phone: 608-277-8330, Fax: 608-277-1726

www.housinginitiatives.org

MISSION STATEMENT

Housing Initiatives, Inc. exists to provide permanent housing for persons in Dane County who have a severe and persistent mental illness and are experiencing homelessness because of the illness.

Housing Initiatives (HII) provides two services:

1. HII owns and operates rental housing units for qualifying tenants; and
2. HII administrates the Rental Assistance for clients on behalf of Dane County Human Services.

This handbook and the policies detailed within constitute a non-standard lease addendum for both tenants and clients living in an HII unit.

This handbook is intended to clarify Housing Initiatives' policies, as well as the duties and responsibilities of both Housing Initiatives staff and you. We hope you find this helpful.

This handbook is divided into two separate parts:

Part One is for tenants who are living in HII's housing units, who may or may not also be a client in the Rental Assistance Program.

Part Two is for clients who are in the Rental Assistance Program and living either in one of HHI's units or in another landlord's unit.

NOTE: *This is an update to an earlier version of the handbook. This current version contains the policies to be followed.*

IMPORTANT NUMBERS:

Emergency (Fire/Medical): 911

Housing Initiatives Office: 608-277-8330

Housing Initiatives Fax: 608-277-1726

Housing Initiatives After-Hours Maintenance Emergency: 608-334-7886

Revenue Service, Publication 502. If something is listed in this Publication 502, HI will deduct that cost from the rent calculation. If an expense is not listed, it will not be deducted from the rent calculation. The Publication 502 can be found at <https://www.irs.gov/pub/irs-pdf/p502.pdf>.

- Proof for all medical expenses will be accepted throughout the year, however, they will only be considered at the annual recertification for the upcoming year.
- Rent calculations are determined based on medical expenses from the previous year. For example, expenses incurred in 2016 will be considered to establish the rent amount for 2017.

Rent Calculation:

- Rent calculation is conducted once a year unless the client has a change in income of at least \$100/month. If a client has such a change, the client must notify HI so that a new rent calculation can be completed. If a client incurs a one-time eligible medical expense during the year, the client may choose to discuss this with HI to determine if a rent calculation is necessary. Otherwise, all other eligible medical expenses will be used to determine the next year's rent calculation.
- HI will inform the client, in writing, what the rent calculation is for the upcoming year.

Appeals:

- If a client wishes to appeal the rent calculation, the client needs to provide HI a written appeal within fourteen (14) days of the date of the rent notice from HI. If the appeal is not written or submitted within the specified time frame, it will not be considered. A specific Appeal Form accompanies this policy.
- The client must submit whatever documentation is being appealed at the same time that the appeal is submitted to HI.
- Once an appeal has been submitted as specified, HI will investigate and render a written decision within fourteen (14) days and specifically state the result of the appeal. Once this has been completed, the appeal is considered closed.

Part One –

for tenants living in HII's housing units

(Please refer to Part Two of this handbook if you are in the Rental Assistance Program, as that also applies to you.)

Expectations for living in HII housing:

HII has two expectations of you so that we can continue to provide you with housing and so that you can continue to qualify for rental assistance.

1. **You must pay the rent that is calculated and owed on time and in full.**
2. **You must maintain a healthy and peaceful living environment.**

Each of these expectations is explained further in the following pages.

Violation of these expectations may result in termination of your lease and/or termination from participating in the rental assistance program. Termination and appeals are explained later on in this handbook.

Housing Initiatives' Rental Assistance Calculations Policy

September 2019

1 - You must pay the rent that is calculated and owed on time and in full.

Rent for Section 8 tenants: If you are a tenant in the Section 8 Program, you are living in an HII unit with assistance from the Madison Community Development Authority (CDA). CDA has a set of requirements to assist you with the amount of rent you are expected to pay. Using these, CDA will determine your portion of the rent. You need to pay that amount by the 5th of every month. You should mail your portion of the rent to:

Housing Initiatives, Inc.
1110 Ruskin St.
Madison, WI 53704

Should you get behind in your rental payments, HII will attempt to work with you and your designated case manager/support person to resolve the problem and/or to institute a rental repayment plan to be paid within 12 months. Should you get behind during the course of the repayment plan, you may be asked to obtain a financial payee to prevent any future non-payment of rent. If you refuse to accept a payee or do not pay rent in full, HII will proceed with lease termination.

Rent for Rental Assistance clients: Please refer to Part Two of this handbook.

Purpose

Specific actions, timeframes and responsibility need to be established regarding out-of-pocket medical expenses and which are eligible to be considered in order to accurately calculate the amount of a client's rental assistance.

Per the United States Department of Housing and Urban Development (HUD), clients will pay no more than 30% of income for rent, after the standard deduction of \$400 annually is subtracted. Additionally, clients may be eligible for utilities and childcare deductions, as well.

Procedure:

Eligible Deductions:

- Upon admission into the Rental Assistance Program, and at least annually thereafter, Housing Initiatives (HI) will work with clients to determine their income and the amount of rental assistance for which they are eligible. Clients will be notified sixty (60) days in advance when the annual recertification is due. The goal is to complete the recertification by year's end for the upcoming year. However, as some receipts may not have been received by the client yet, receipts will only be accepted until January 31st for the new year's rent calculation.
- HI will calculate rent based on HUD's established criteria, taking into consideration all possible deductions, such as medical, utility and childcare expenses.
- HI will need to have proof for all expenses, such as receipts for every purchase that specifically state what was purchased and the cost for each item. This is the responsibility of the client to collect and submit to HI. Ideally, receipts will be submitted along with the annual Social Security notice of income.
- Any amount of out-of-pocket medical expenses can be submitted; however, HI will only allow expenses that are solely listed in the most recent version of the Department of the Treasury Internal

HOUSING INITIATIVES, INC.

608-277-8330 -- Email – info@[housinginitiatives.org](mailto:info@housinginitiatives.org)

Rent co-payment calculation for: SAMPLE RENT CALCULATION WORKSHEET

of Adults: _____ # of Children: _____

According to information provided to Housing Initiatives, as of _____, your monthly income sources are:

<u>(Source)</u>	<u>(Amount)</u>
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

A. Monthly income -- total of above \$ _____

B. **Deductions:** 1. Dependent Allowance: Enter \$40 for each dependent \$ _____

2. Child Care Allowance: Enter expenses for care of under-12 children \$ _____

HANDICAPPED ASSISTANCE ALLOWANCE

3a. Enter reasonable expenses for attendant care that enable a household member to work \$ _____

3b. Multiply A. (Monthly income) by 0.03 \$ _____

3c. Subtract 3b from 3a (enter "0" if <0) \$ _____

3d. Enter amount earned by family members which was dependent upon the handicapped assistance allowance \$ _____

3e. Enter the lesser of lines 3c and 3d. This is the HANDICAPPED ASSISTANCE ALLOWANCE \$ _____

4. Medical Expenses (Attach Exhibits A & B) \$ _____

5. If line 3c is >0, enter the amount from #4; otherwise, add lines 3a. and 4 and subtract from that the amount in line 3b and enter here \$ _____

6. Elderly and Disabled Family Allowance – Enter \$33.33 for every household member who is disabled or over the age of 62. \$ _____

7. Add lines 1, 2, 3e, 5 and 6 \$ _____

8. Subtract B7 from A, this is the ADJUSTED MONTHLY INCOME \$ _____

C. **Rent Calculation** 1. Multiply B8 (Adjusted Monthly Income) by .30 \$ _____

2. Multiply A (Monthly income) by .10 \$ _____

3. Resident rent – enter larger of C1. or C2. \$ _____

4. Deduction for utilities paid by tenant (if any) \$ _____

5. Final resident monthly rent – subtract 4 from 3. \$ _____

Please send this amount \$ _____ on the first of each month to:

**Housing Initiatives
1110 Ruskin
Madison WI 53704**

Should your income change in the future, or should your household situation change, please let us know at the phone/address at the top of the page and we will adjust your co-payment accordingly.

2 - You must maintain a healthy and peaceful living environment.

All tenants in HII properties are eligible for supportive service programs. As such, we understand that all of our tenants have unique challenges to living independently. Our policies are designed to help you maintain independent living and coexist with neighbors who are also clients in supportive service programs.

Leasing and Inspections: HII’s housing leases are the basis of the legal relationship between you and HII. All units must be occupied pursuant to a dwelling lease agreement that complies with HUD’s regulations. HUD rules also require HII to inspect each dwelling unit prior to move-in, annually during occupancy and at move-out. HII may require additional inspections.

Lease Orientation: After unit acceptance, but prior to occupancy, an HII representative will provide you with a lease orientation. The head of household or spouse is required to attend, as well as all family household members age 18 or older.

Move-In Inspections: The lease requires HII and you to inspect the dwelling unit prior to occupancy in order to document the condition of the unit and equipment in the unit. A copy of the initial inspection, signed by you and HII staff, will be provided to you and HII will keep a copy in your tenant file.

Move-Out Inspections: HII will inspect your unit at the time you vacate the unit. You may participate in the inspection if you wish, unless you vacate without notice to HII. The difference between the condition of the unit at move-in and move-out establishes the basis for any charges against the security deposit so long as the work needed exceeds that of normal wear and tear. HII will provide you a statement of any charges to be made for maintenance and damage beyond normal wear and tear within 21 days of tenant move-out.

RESIDENT RENT CALCULATION WORKSHEET

Maintenance and Damage Charges: If HII charges you for maintenance and repair beyond normal wear and tear, HII will specify the reason and cost for the charges. Schedules of special charges for services and repairs are required to be incorporated in the lease and will be explained to you as well. HII will arrange a payment plan for any such charges with you. When applicable, work will be charged based on HII's actual costs of parts and labor.

Annual Inspections: HII is required to inspect all occupied units annually using HUD's Housing Quality Standards form 9602.

Scheduling of Inspections: Inspections will be conducted during normal business hours. You do not have to be home for HII to conduct its annual inspection. HII will notify you of the inspection with at least 24 hours prior to the inspection. If you need to reschedule, due to a medical situation, you must notify HII at least 24 hours prior to the scheduled inspection or as soon as possible. If the delay was requested because of a medical reason, HII will reschedule, but you must produce verifiable medical documentation. HII will reschedule the inspection only once. HII staff will be present for all inspections.

Emergency Entries: HII may enter the dwelling unit at any time without advance notice when there is reasonable cause to believe that an emergency exists. If no adult household member is present at the time of an emergency entry, we will leave a written statement showing the date, time and purpose of the entry prior to leaving the dwelling unit.

Participant:

Address:

Effective Start Date:

Part I TOTAL ADJUSTED INCOME DETERMINATION		
ANNUAL GROSS INCOME		
A. Income	Type Income Reported	Amount
		\$0.00
		\$0.00
		\$ -
		\$
		\$
Total A:		\$0.00
B. Income Exclusions	Type of Exclusions	Amount
		\$
		\$
Total B:		\$
C. Annual Gross Income		Amount
Subtract the total amount of income exclusions from the total amount of eligible income		\$
Total A-B:		\$0.00
ADJUSTMENTS TO INCOME		
D. Dependent Allowance	Number of Dependents	Amount
Multiply the number of dependents by \$480	0	\$0.00
E. Childcare Allowance	Description	Amount
Expenses for care of children under age 12		0
F. Disabled Assistance Allowance	Description	Amount
F1. Disabled assistance expense: Reasonable expenses for attendant care to enable a household member to work		0
F2. Adjusted amount of disabled assistance expense	F1 x .03 =	0
F3. Adjusted disabled assistance expense	F1 - F2 =	0
F4. Family members' earnings dependent on attendant care: Enter lesser of adjusted disabled assistance (F3) expense of family member earnings (F4)	Total:	0
G. Medical Expenses Allowance	Description	Amount
G1. Medical expenses not covered by insurance or unreimbursed		0
G2. 3% of total income		\$0.00
G3. Adjusted Medical Allowances		
If Adjusted Disabled Assistance Expense (F3) is greater than zero, enter Medical Expenses to the right. If not, add Disabled Assistance Expense (F1) and Medical Expenses (G1) lines and enter to the right	G1 Total:	\$0.00
H. Elderly or Disabled Family Allowance		Amount
Multiply number of elderly (62 years or older) or disabled family members who are the head of household, spouse, or sole member of household by \$400	1	\$400.00
	Total:	\$400.00
I. Total Allowance		Amount
Sum of Totals in Sections D through H	Total:	\$400.00
J. Total Adjusted Income		
ENTER ANNUAL GROSS INCOME (Line C)		\$0.00
ENTER TOTAL ALLOWANCES (Line I)		\$400.00
TOTAL ADJUSTED INCOME (Subtract Total Allowances from Annual Gross Income)		(\$400.00)
Part II RESIDENT RENT DETERMINATION		
K. Divide TOTAL ADJUSTED INCOME	(Line J/12 months) x .30 =	(\$10.00)
L. Divide ANNUAL GROSS INCOME	(Line C/12 months) x .10 =	\$0.00
M. Amount of WELFARE RENT, if applicable		
N. MAXIMUM RENTAL AMOUNT PER MONTH	Largest of K, L, and M =	\$0.00
	Rounded to nearest \$	\$0.00
RESIDENT RENT WHEN UTILITIES ARE NOT INCLUDED IN RENT		
O. Utility Allowance	Description	Amount
Enter total amount of utility allowance		\$0.00
P. ADJUSTED RESIDENT RENT WITHOUT UTILITIES	Line N - Line O =	\$0.00
Q. RESIDENT RENT DUE		\$0.00
Q. Rent Start Date		

Participant Signature _____ Date _____

Staff Person Title & Signature (who completes worksheet) _____ Date _____

Violations of Leases: Housing Initiatives urges you to carefully read over leases before you sign them as you are expected to follow any and all clauses in them.

If you violate a lease clause, you may be subject to notice-to-cure actions by the landlord. Repeated violations may result in non-renewal of leases or evictions from housing. **Evictions from housing are subject to termination from the Rental Assistance program.**

Grievances with landlords: HII urges you to be proactive about resolving disputes with your landlord. In the event a dispute cannot be mutually resolved, HII recommends you contact the Tenant Resource Center for assistance with your legal rights as a tenant. The Tenant Resource Center may be reached at 608-257-0006 or ww.tenantresourcecenter.org.

Grievances with Housing Initiatives: If you have a complaint about the HII Staff or its contractors, please contact the Executive Director at (608)277-8330.

Any complaints you may have with the Executive Director or HII Staff in the application of the Rental Assistance Program, may be directed to the Dane County Department of Human Services. The Adult Community Services Manager can be reached at (608)242-6484.

Appeals: Any appeals of notices to cure, lease non-renewal or lease termination need to be made in writing to HII's Executive Director within 10 days of receipt of any notice. A meeting will be held and the Executive Director will make a final decision on any notice.

Housekeeping: HII considers proper housekeeping and cleanliness important factors in being able to maintain independent living. HII will post a list of expected housekeeping duties on your refrigerator. You are expected to complete these duties, keeping your unit safe and sanitary.

If HII finds that your housekeeping habits pose a health or safety risk, encourage insect or rodent infestation, or cause damage to the unit, this will be considered a lease violation and you will be served with a 5 day notice-to-cure.

A re-inspection will be conducted at the end of the notice-to-cure to confirm that you have complied with correcting the problem. Failure to abate the problem or allow for a re-inspection is considered a violation of the lease and may result in termination of your lease.

Continued violations of keeping your unit safe and sanitary, will result in non-renewal or termination of your lease.

Reporting Maintenance Issues: It is very important that you inform HII should any maintenance issues arise with your home as soon as possible. In the event something in your home requires attention (e.g., light switch not working), call maintenance at 608-277-8330. In the event of a maintenance emergency after hours 5 PM or on weekends (e.g., burst pipe with running water, a fire, etc.), contact the emergency number at 608-334-7886.

Maintenance issues are logged at the office and will be addressed as soon as possible with emergency issues receiving top priority.

Guests: A guest is defined as a person temporarily staying in the unit with your consent, or the consent of another member of your household, who has express or implied authority to consent on your behalf. You, and the members of your household, have the right to exclusive use and occupancy of your leased unit, in accordance with the lease, including reasonable accommodation of your guests. You are responsible for the conduct of visitors and guests, inside the unit as well as anywhere on or near the premises.

Guest Policies:

- Dwelling units are specifically for you and the individuals specifically listed on the lease.
- Your housing arrangement and structure of the family household composition is established by the lease. Therefore, you cannot take in boarders, roommates or permit visitors/guests to reside in your unit in a “doubling-up” type of situation.
- You must notify HII when you have overnight guests who will be staying in your unit for more than 2 days. A guest can remain up to 7 consecutive days or a total of 14 cumulative calendar days during any 12-month period.
- You may request an exception to this Guest policy for valid reasons (e.g., care of a relative recovering from a medical procedure expected to last 20 consecutive days). An exception will not be made unless you can provide verifiable documentation in writing for the need and provide verifiable documentation that the guest has a home to which the guest can return.
- Children who are subject to a joint custody arrangement or for whom a family has visitation privileges, that are not included as a family member because they live outside of the housing unit more than 50 percent of the time, are not subject to the time limitations of guests as described above.

A copy of your signed current lease will be in your file at HII. It is your responsibility to provide HII with any addendums signed with the lease and all lease renewals.

HUD rules require HII to inspect your dwelling unit annually during occupancy.

Maintenance and Damage Charges: All maintenance and damage charges you accrue, and charged by Housing Initiatives, Inc or a private landlord, are your responsibility. All disputes with private landlords regarding these charges are between you and the landlord. HII urges you to seek assistance from support staff to help mitigate these issues.

In the event that you have maintenance issues with your apartment unit, should you not be renting from HII, you should contact your landlord to have them repaired. Please also contact HII to report maintenance issues so that we may be able to follow up to verify your issues are addressed.

Housekeeping: HII considers proper housekeeping and cleanliness important factors in being able to maintain independent living.

In the event that a landlord informs HII that your housekeeping habits pose a health or safety risk, encourage insect or rodent infestation, or cause damage to the unit, HII will contact your support staff to work with you to mitigate any of these conditions.

If your housekeeping habits are not mitigated, it may result in lease violations that may put your housing in jeopardy.

Medical Expenses for Rent Calculation Credit: Out-of-pocket medical expenses may qualify for credit for your rent calculation. HII uses the Department of the Treasury Internal Revenue Service, Publication 502, Medical and Dental Expenses to determine which medical expenses are eligible for a rent deduction. Receipts for medical expenses from the previous year will be used to calculate your rent amount each year.

In order for HII to consider your medical expenses, you need to provide HII's Program Director with receipts that you paid from the previous year's expenses. HII will determine whether or not these expenses qualify. Expenses have to exclusively be used for your health benefit in order to be deemed eligible for deduction. Prescription documentation from your medical provider may be required. All of your medical expenses will be reviewed for eligibility. You will be provided with a written explanation as to why something did or did not qualify for an eligible medical deduction towards your rent calculation. If you dispute the Program Director's denial of medical expenses, you may appeal the decision to HII's Executive Director. A September, 2017 memo detailing the policy is attached on Page 19 of this handbook.

2 - You must maintain a healthy and peaceful living environment.

We understand that you are working with specific clinical issue that may result in specific challenges to your living environment. Our policies are designed to help you maintain your independent living.

Leasing and Inspections: You are required to have a signed lease for your dwelling unit. However, HII must approve all leases, even those with private landlords, prior to your signing it and moving in. HII will discuss conditions and expectations of the lease with you.

- HII may prohibit any guest from visiting, temporarily staying, or living in your unit, or on HII property, for a stated period of time if the guest:
 - has engaged in negative behavior or criminal activity; or
 - has engaged in or threatened violent or abusive behavior toward HII staff, contractors, or other tenants.
- HII will notify guests that they are prohibited from HII property by issuing a no trespassing notice with you and the guest, if possible.
- Former tenants, who have been terminated, are not permitted on Housing Initiatives, Inc property.
- Guests who represent the unit address as their residence address for receipt of benefits or other purposes will be considered unauthorized occupants. Guests may not receive mail. Guests who remain in the unit beyond the allowable time limit will be considered unauthorized occupants. The presence of unauthorized occupants constitutes a violation of the lease.

Drug Crime On or Off the Premises: Drug-related criminal activity is defined by HUD as the illegal manufacture, sale, distribution, or use of a drug, or the possession of a drug with intent to manufacture, sell, distribute or use the drug. Drug means a controlled substance as defined in section 102 of the Controlled Substances Act.

Drug related criminal activity engaged in, on or off the premises by you, a member of your household, a guest, or any other person under your control is grounds for termination. You will not be given a second chance and HII will terminate your lease.

HII may also terminate your lease for drug related civil activity engaged in, on or off the premises by you, a member of your household, a guest, or any other person under your control.

Alcohol or Drug Abuse: If you, a member of your household, a guest, or any other person under your control engages in abuse or pattern of abuse of alcohol or drugs that threatens the health, safety, or the right to peaceful enjoyment of the premises by others, HII may terminate your lease.

In making the decision to terminate the lease or not to terminate it, HII will consult with your support services and clinical staff. HII will consider all credible evidence, including but not limited to, treatment plans, record of conviction(s), arrest(s), police contact (s), civil ordinance violation(s) and other pertinent factors. **Upon consideration of such alternatives and factors, HII may, on a case-by-case basis, choose not to terminate the lease.**

When you enter the program, and once a year thereafter, HII will meet with you, if you need and request it, and complete necessary paperwork for you to continue to qualify for the Rental Assistance Program. At this time, you must provide us with written documentation of income and medical expenses for yourself and any others in your household and identified within your lease. HII will calculate your rent amount based on HUD's established criteria. A copy of the form that we use for rent calculation is included at the end of this handbook.

You should mail your portion of the rent by the 5th or the month to:

Housing Initiatives, Inc.
1110 Ruskin St.
Madison, WI 53704

If you have a change in income, you need to inform HII within 10 days so that we may recalculate your rent. Withholding changes in income can result in program termination.

Should you get behind in your rental payments, HII will attempt to work with you and your designated case manager/support person to resolve the problem and/or to institute a rental repayment plan to be paid within 12 months.

Should you get behind during the course of the repayment plan, you may be asked to obtain a financial payee to prevent any future non-payment of rent. If you refuse to accept a payee or do not pay rent in full, HII will proceed with lease termination.

2. Failure to make progress on a service plan;
3. Loss of income or failure to improve income; and
4. Being a victim of domestic violence.

Expectations for Rental Assistance clients: HII has two expectations of you so that we can continue to provide you with rental assistance.

1. **You must pay the rent that is calculated and owed on time and in full;**
2. **You must maintain a healthy and peaceful living environment.**

These expectations are explained further in the following pages.

Violation of these expectations may result in termination of your lease and/or termination from participating in the rental assistance program. Termination and appeals are explained in the following pages.

1 - You must pay the rent that is calculated and owed on time and in full.

Income: Income is not a requirement for participating in the Rental Assistance Program. Income that you receive needs to be reported to Housing Initiatives as part of the application and recertification processes.

Rent for Rental Assistance Clients: You are in this program with assistance from the U.S. Department of Housing and Urban Development. They have a set of requirements for us to provide you with a rent subsidy. The rent amount that you are required to pay primarily depends upon your income and medical expenses. Some of your medical expenses will be eligible to be used for a rent deduction.

Assistance Animals: Assistance animals are animals that assist, support, or provide service to a person with a disability, or that provide emotional support that alleviates one or more identified symptoms or effects of a person's disability. Assistance animals that are needed as a reasonable accommodation for persons with disabilities are not considered pets, and thus, are not subject to HII's pet policies.

For an animal to be excluded from the pet policy and be considered an assistance animal, there must be someone with a disability in the household. You must request a reasonable accommodation for the assistance animal. HII will review and approve in accordance with HII policies. You must supply documentation from a clinical service provider stating that ownership and maintenance of the animal will positively aid you with your mental health needs prior to bringing the animal home.

HUD regulations do not affect any authority HII may have to regulate assistance animals under federal, state, and local law. You must care for assistance animals in a manner that complies with state and local laws, including anti-cruelty laws. You must follow all City Ordinances about the care and handling of the assistance animal and immediate disposal of all animal waste.

You must ensure that assistance animals do not pose a direct threat to the health or safety of others, or cause substantial physical damage to the development, dwelling unit, or property of other tenants. When your care or handling of an assistance animal violates these policies, HII will consider whether the violation can be reduced or eliminated by a reasonable accommodation. If HII determines that no such accommodation can be made, HII may withdraw the approval of the particular assistance animal.

Grievances: If you have a complaint with another tenant or a tenant's guest, you should try to resolve it with that person. If you cannot, notify the Property Manager. The Property Manager may meet with everyone involved or come up with an alternative plan. Complaints that are unable to be resolved by the Property Manager may be appealed to the Executive Director.

If you have a complaint about any HII staff, or its contractors, contact the Executive Director at 608-277-8330.

Appeals: Any appeals of notice-to-cure, lease non-renewal or lease termination need to be made in writing to HII's Executive Director within 10 days of receipt of any notice. A meeting will be held and the Executive Director will make a final decision on any notice.

Part Two –

For clients who are in the Rental Assistance Program and living either in one of HII's units or in another landlord's unit.

Please read Part One of this handbook if you are living in a property owned and managed by HII, as that also applies to you.

The Rental Assistance Program: The U.S. Department of Housing and Urban Development enacted the Rental Assistance program in 1992. The program is designed to provide permanent rental assistance for homeless persons with severe mental illnesses. HII has administered the program since 1995 and currently administers the program on behalf of Dane County's Department of Human Services.

Housing First Principles:

The Rental Assistance Program follows the principles of Housing First, as directed to our local Continuum of Care by HUD and outlined in the Madison/Dane County Written Standards. Per these standards, potential clients may not be denied admittance into the program for the following reasons:

1. Having too little or no income;
2. Active, or history of, substance use or a substance use disorder;
3. Having a criminal record; or
4. History of domestic violence (e.g., lack of a protective order, period of separation from abuser, or law enforcement involvement)

Additionally, clients in the Rental Assistance Program may not be terminated from the program for the following reasons:

1. Failure to participate in supportive services;