



Issue Brief

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How to Develop an Eviction Prevention Plan in Affordable, Supportive, and Integrated Housing for Property Owners and their Partners

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Evictions have a negative, costly and traumatic impact on tenants, owners, property managers, service providers and communities alike. Typically, eviction prevention is introduced as a component of supportive housing to reverse the housing instability plaguing vulnerable populations. Moreover, if the goal is to create housing to help vulnerable people access and maintain housing, eviction should be the last resort. Equally important, many owners and property managers who do both supportive and affordable housing, understand that preventing evictions for tenants is also key to successfully operating their property. In the supportive housing environment, housing and service providers approach evictions with the goal of working together across all parties to proactively alleviate potential lease violations and only pursue eviction as a last resort. Many of the same principles of eviction prevention in supportive housing can be applied to affordable housing.

Recognizing the importance of preventing evictions to reduce the impact of eviction on low-income households, IHCDA added a scoring element in the Qualified Action Plan (QAP). The QAP guides properties for implementing management practices in which eviction

EVICTION PREVENTION COMPONENTS

1. Eviction Prevention Philosophy
2. Resident Engagement Approaches
3. Community Partnerships Connecting Households to Resources
4. Roles and Responsibilities of Property Management Staff and Services Staff and Identify Mechanisms for Coordination and Communication
5. Tenant Knowledge of Roles and Responsibilities
6. Housing Retention Plans
7. Strategies for Mitigating and Responding to Common Lease Violations
8. Eviction Protocols

is a last resort, and committing to report on eviction activities in annual compliance reporting. This scoring category was added in the 2022 QAP and is intended to remain in the QAP indefinitely. While the QAP mandates that developments submitting applications under the Housing First Set-Aside are required to adopt an Eviction Prevention strategy, the additional scoring incentive expands this best practice to the broader affordable housing applicant pool.

Each of the core components of eviction prevention should be in any eviction prevention plan. The components are listed here and then described to the left.

Develop Your Eviction Prevention Philosophy: Eviction prevention starts with a philosophy that everyone involved, including the owner, property manager, service providers and tenants, have the desire for tenants to be successful in their housing. Equally significant is recognizing that the legal eviction process is costly to the property owner involving legal, security, turnover of units, marketing and new tenant screening.

- Engage resource providers and stakeholders, including tenants, in dialogue to inform and design the eviction prevention philosophy and plan.

Develop Resident Engagement Approaches: Adopting practices that include trauma informed care, de-escalation techniques, strengths-based approaches, and good customer service is particularly useful in avoiding lease violations and practicing an eviction prevention approach.

- Tenancy sustaining services are a key part of eviction prevention and include life skills, linkages to education and employment training, and connections to primary, mental, and behavioral health services.
- Property managers and service providers should receive training to implement harm reduction protocols based on the reality that alcohol and substance use can lead to many types of lease violations. Other best practice trainings for property management may include motivational interviewing, active listening, and conflict resolution.
- Peer specialists bring lived expertise that can be effective in reaching tenants at risk of losing their housing for building trust, sharing information, and supporting the tenant in resolution of issues.

Develop Community Partnerships Connecting Households to Resources: Tenancy sustaining services must be a key part of eviction prevention. In supportive housing, property management and service providers develop intentional partnerships. There may be supportive service offices or a resident coordinator position on-site who helps to navigate and build relationships with service partners.

- In affordable, 100% supportive housing or integrated (affordable and supportive housing) there are relationships established through Memorandums of Understanding (MOUs). A strong MOU will outline the types of services, roles and responsibilities, communication protocols, and accountability for outcomes.
- Resources may include rental and utility expense assistance, housing counseling, legal representation, and landlord/tenant guides or handbooks.

Delineate the Roles and Responsibilities of Property Management Staff and Services Staff and Identify Mechanisms for Coordination and Communication: A key component in eviction prevention strategies is to have clearly delineated roles between property management and services while simultaneously identifying how these two parties work together to mitigate or avoid evictions. These roles can be outlined in more detail in an MOU, but an overview should be provided in the eviction prevention plan. Develop tenant “release of information” forms for communication between services staff and property management staff. The “release of information” form should be limited to only sharing information required to help a tenant maintain their housing.

- Property managers and owners have a responsibility to maintain the property, screen tenants, adhere to local, state and federal laws, collect rent, ensure fiscal soundness, and ensure the safety and security of the broader tenant community, as well as be a good neighbor in the community.
- Tenants are responsible for adhering to lease terms, which generally relate to payment of rent in a timely manner, maintenance of the housing unit in good condition, and to conduct themselves, their household members and guests in a manner that respects the tenancy of neighbors.
- Service providers and case managers provide intermediary support to both tenant and property management to identify concerns, explain requirements and mediate solutions when issues arise. Maintaining tenant's privacy while advocating is an important element in the role of the case manager.
- Regular communications and meetings between the case manager or service provider and property management are a valuable vehicle to identify tenant lease compliance concerns and identify the role or person best able to respond to the concern successfully. Maintenance and other staff can be resources to identify tenancy issues before they escalate to a lease violation.

Help the Tenant Understand their Rights and Responsibilities as a Leaseholder: Eviction prevention is often viewed as a series of steps that occur after multiple lease violations occur. However, preventing evictions starts as soon as people move into housing by assisting tenants in understanding their rights and responsibilities as a leaseholder and what they can expect from the property manager or landlord. Although much of the focus may be on the tenant and their responsibilities, there should be equal focus given to what the tenant should expect from the services, property management and maintenance staff.

- The lease defines terms related to payment of rent, utilities, late fees, maintenance of the unit, and ending a lease early.
- When an inspection or entry into a unit is necessary, the landlord is required to provide prior notice related to date, time, and purpose.
- Review procedures for repairs both emergency and regular maintenance. This review may also include who to contact in an emergency and when a 911 call is appropriate.
- Property owners cannot lock out a tenant or change locks, remove doors, or cut off utility services.
- Tenants are responsible for guests' behaviors and compliance with lease terms.
- Tenant handbooks, move-in orientation, regular meetings, and welcome kits are good resources to start the tenancy off on a good foundation. Continuing lease education at intervals throughout the lease term will help a tenant gain a solid understanding of the lease terms.

Develop Housing Retention Plans: If a tenant has struggled in the past to maintain housing, a housing retention plan is a good opportunity for the service provider to share with the tenant the goals, actions and benefits of a housing retention plan. If the tenant is interested, the housing retention plan should be developed by the service provider in collaboration with the tenant and

can identify areas of strength that a tenant can build on as they navigate residing in a new unit. Developing and reviewing a housing retention plan is also an opportune time to review the lease.

- Confirm with the tenant their goals to maintaining housing. Work with tenant to incorporate specific steps or actions to take in specific situations or scenarios.
- Address areas that may result in a warning or a written lease violation. Common areas include not paying rent or utilities, not maintaining the unit, or having overnight guests that either stay beyond what is allowed, or guests whose actions disturb neighbors.
- If needed, the service provider can help coach the tenant in navigating the property manager/tenant relationship.
- If applicable, inform and assist the tenant on reasonable accommodation procedures to address potential lease violations that may be related to tenant disability challenges.
- Identify family or friends that may provide support to a tenant that is facing an eviction.

Develop Strategies for Common Lease Violations: Eviction prevention is a range of strategies that help tenants remain housed. Since people in crisis may feel overwhelmed by the situation, eviction prevention services must help them recover a sense of control and empowerment to proactively overcome challenges. The property manager and service provider should consistently show respect for the tenants' strengths and highlight progress made. Crisis resolution should focus on personal safety and de-escalating the situation. Some clients may only need advice about how to address a tenancy situation. An explanation of tenant rights and responsibilities may resolve a conflict that otherwise would escalate into an eviction. For other, more entrenched or challenging situations, tenants may require more coaching and support from the service provider and the property manager.

- An important strategy for eviction prevention is to focus on lease violations and not behavior. For example, substance use is not a lease violation; however, it can lead to behaviors that violate the lease. The property manager should focus on the lease violation while supportive services staff assist the tenant in addressing issues that lead to behaviors that resulted in the lease violations.
- Design an assessment tool to identify potential risk factors or activities that may lead to lease violations and eviction; i.e. job or benefits loss or reduction, pattern of late payments, previous evictions or frequent moves, changes in household composition, lack of response to communications, or missed appointments. While not intended to be used as barriers to leasing, awareness of these factors can help property managers and service providers work with tenants in advance of a crisis or backlog of rental payments.
- Include information in rent notices about safety net supports such as unemployment benefits, tax credits, refunds, financial assistance, and connections to resources.
- Steps to resolve common lease violations:
 - *Non-payment of rent:* Work with the tenant to determine the cause for non-payment. It could be lack of resources, other crisis intervention, or they may have a complaint regarding the unit condition. Each reason can generate steps to resolution such as a payment plan, referral to other resources including financial budgeting, a representative payee, or a review of unit condition concerns.

- *Guests and noise levels:* Investigate the complaint and if justified, utilize verbal warnings for complaints from neighbors. If the behaviors continue, the property manager should work with the service provider to help the tenant to understand the seriousness of the violation that is putting their housing at risk, support the tenant to set limitations or gain the tools to better manage the circumstances they struggle to control. Follow-up with the tenant to solidify their confidence and success.
- *Poor upkeep of unit:* Assist tenants to document damage or repairs needed in a unit. Review with tenants their housekeeping strategies, and consequences of causing damage to the housing unit. Investigate flexible subsidy resources that may be available to complete repairs, and/or create a repayment plan with the help of service provider.

Develop Eviction Protocols: The process for implementing an eviction should be detailed in the Property Management or Operating Plan and referenced in the Eviction Prevention Plan. Pursuit of an eviction should require approvals by executive staff of the organizations involved. The tenant should have the opportunity to meet with the executive staff and have an advocate or case manager accompany them. Evictions should be the remedy of last resort after all avenues have been exhausted to help the tenant maintain their housing.

- A detailed appeals process, including template forms, documentation requirements and possible resolutions should be part of the eviction protocols.
- Some properties utilize an evictions prevention committee that reviews protocols followed prior to decisions to proceed with the legal eviction. This review should include details of lease violations as well as documentation of all steps taken to resolve the violations.
- Make sure your protocols incorporate knowledge of local court system, bar association, mediation or arbitration avenues, and legal aid eviction prevention programs, and comply with all mandatory legal requirements and notices. It is important to also ensure your protocols comply with all Fair Housing, VAWA, and related nondiscrimination requirements.
- Consider eviction alternatives that are less damaging for the tenant's future housing options such as cash for keys, lease termination, or the nonrenewal of an expiring lease.
- Make supportive services available to residents such as child care, financial and legal assistance prior to and on the day of eviction proceedings.

EVICTION PREVENTION PLAN

Property Name

The purpose of this plan is to establish a standardized framework through which PROPERTY will address lease violations with the goal of mitigating harm to the tenant and property and employing eviction only as a last resort.

Eviction Prevention Philosophy

Summarize the property's eviction prevention philosophy here, including perspectives and commitments from the owner, property manager, service provider(s), and tenants.

Resident Engagement Approaches and Development of Community Partnerships

Summarize the practices that will be adopted to assist tenants to avoid lease violations and prevent evictions, including but not limited to:

- Tenancy sustaining services that will be offered to residents, including a description of relationships established through Memorandums of Understanding (MOUs), and the types of services and resources offered to residents
- Trainings that property managers and services providers will complete initially or on an ongoing basis to anticipate lease violations and productively work with residents toward resolution
- The role of peer specialists in supporting residents and promoting long-term housing stability

Include description of resident engagement approaches here.

Roles and Responsibilities of Property Management and Services Staff

Provide an overview of the roles that property management staff and services staff will have in promoting resident housing stability and preventing evictions, clearly describing the implementation and scope of applicable releases of information (ROIs) and methods and frequency of communication between the parties.

Include description of resident engagement approaches here.

Leaseholder Education Practices

Describe any efforts or practices that will be implemented at the property to provide residents with education regarding their rights and responsibilities as leaseholders, noting the nature and frequency of the prevention practice. Additionally, describe how and when information about what



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the tenant should expect from the services, property management, and maintenance staff will be communicated.

Include description of leaseholder education practices here.

Role of the Housing Retention Plan

Summarize the role of the housing retention plan as a tool to prevent eviction, describing specifically when the housing retention plan will be offered to the resident, what will be the roles of the property manager and service provider, and the types of documentation that should be collected.

Include description of the role of housing retention plan in preventing evictions.

Strategies for Mitigating and Responding to Common Lease Violations

Describe specific strategies that property and case management will employ to prevent and address lease violations.

Include description of strategies for mitigating and responding to common lease violations.

Eviction Prevention Protocol

Describe the property's policies and procedures for implementing an eviction, including but not limited to:

- Detailed description of the formal eviction process, only to be used in very limited instances as a last resort,
- Description of the role and composition of the Eviction Prevention Committee, if applicable
- A detailed description of the appeals process, template forms, documentation requirements, and possible resolutions
- Description of any informal eviction processes that will be pursued if a tenant must leave the property (e.g., nonrenewal of lease, mediation, arbitration, etc.)

Include description of policies and procedures here.



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Sample PSH Eviction Prevention Plan

The purpose of this plan is to establish a standardized framework through which {fill in Property Name} will address lease violations with the goal of mitigating harm to the tenant and property and employing eviction only as a last resort.

Eviction Prevention Philosophy

{PROPERTY MANAGEMENT-FILL IN YOUR NAME} and {SERVICE PROVIDER-FILL IN YOUR NAME} are working together to provide quality affordable housing and tenant services at this property to help tenants achieve the best possible quality of life. SERVICE PROVIDER-FILL IN YOUR NAME and {PROPERTY MANAGEMENT-FILL IN YOUR NAME} have come together to promote innovative practices in this permanent supportive housing program to prevent eviction and educate residents in the role of being a good neighbor and tenant. SERVICE PROVIDER-FILL IN YOUR NAME as a trained supportive services provider, will provide engagement and supportive services to all tenants. These tailored services will connect tenants with the support they need to meet their individual goals. The focus of the services will be on housing retention and improved quality of life.

While eviction is sometimes inevitable, SERVICE PROVIDER-FILL IN YOUR NAME and PROPERTY MANAGEMENT PROVIDER will provide intensive services and support so that tenants will have every opportunity to remain housed. Evicting tenants is not consistent with SERVICE PROVIDER-FILL IN YOUR NAME or PROPERTY MANAGEMENT PROVIDER's strategic vision of ending tenants' homelessness.

Resident Engagement Approaches and Development of Community Partnerships

SERVICE PROVIDER-FILL IN YOUR NAME has a history of providing services to the most vulnerable tenants in our community. Case management is a key component of the supportive services that are provided, with a focus on housing stability, health, recovery, and individual growth. Tenants will develop an Individualized Housing Plan that empowers them to identify their individual goals that tie to housing stability and self-sufficiency.

SERVICE PROVIDER-FILL IN YOUR NAME does not require participation in services to be eligible for housing assistance or ongoing tenancy. Case managers routinely use motivational interviewing and assertive engagement techniques to build trusting relationships with tenants and introduce them to the services available.

The standard protocol for eviction prevention for residents in vulnerable populations includes the following procedures to proactively establish goals and expectations to avoid issues that could result in eviction:

1. All tenants will receive a copy of their lease before move-in to the property. The supportive housing team will revisit lease provisions with tenants throughout their tenancy to support understanding and housing stability.
2. The supportive housing team will work on specific programming for the new tenants as the tenant moves into the Property. The team will develop this programming with the goal of assisting tenants during the first six months to adjust to housing and avoid the pitfalls that many tenants face when first moving into a property. Within the first 90 days, the case

manager will develop an Individual Housing Plan with the tenant which will incorporate specific and measurable goals that may include but not limited to:

- a. Maintaining housing
 - b. Issues of income, employment and money management
 - c. Independent living skills
 - d. Social and relationship skills
 - e. Improved physical health, mental health and/or substance use
3. Property Management will host quarterly sessions focused on educating tenants on the lease and what their obligations are thereunder.
 4. Supportive services staff will engage with all tenants not less than once per week to focus on residential stability and reinforce lease compliance.
 5. Service staff will provide a variety of on-site tenancy sustaining services, including case management, skills training, and referrals to community-based services and organizations (see below for complete list of services and referrals)
 6. The property has built the following relationships with these local community organizations to support the needs of tenants. {List partners or planned partners and be specific. Examples include food pantries, banks, educational institutions, Work One or other employment resources, faith-based orgs, community centers, service sororities or similar service orgs, libraries, NA/NA and other self- help support groups, etc.}

Roles and Responsibilities of Property Management and Services Staff

PROPERTY MANAGEMENT PROVIDER and SERVICE PROVIDER-FILL IN YOUR NAME staff will work collaboratively as a team to proactively mitigate potential and actual lease violations with the common goal of eviction being the last resort. The team will share relevant information early and often to support the success of residents and each other.

All property management and services staff will receive training in the following: {these are highly recommended-also add any addition training here} Supportive Housing/Housing First 101; eviction prevention planning; trauma-informed care; motivational interviewing; de-escalation/crisis intervention

1. Property Management Staff responsibilities include: {this is a possible list-add in your own}
 - New tenant orientation and educating residents at move in on their lease obligations.
 - Clearly communicate how to reach staff for questions/concerns they may have throughout their residency and be readily available to residents.
 - Complete all required compliance documentation in a timely manner to maintain ongoing rental subsidies and affordability components for the property and residents.
 - Encourage involvement in services to address issues as quickly as possible and identify all potential resources to assist in avoiding eviction.
 - Meet with services staff weekly to review any current residents at risk of eviction and the progress/success of housing retention plans in progress.
2. Support Services Staff responsibilities include: {this is a possible list-add in your own}
 - Regular engagement with all residents to build relationships that support tenancy and encourage participation in services.

- Provide on-site support services including: {fill in what you will provide-this is just a possible list}
 - peer support services, case management, daily living skills support and training, new tenant orientation, employment services, access to food, clothing, hygiene, and cleaning supplies, crisis intervention, support groups, life skills education, conflict resolution and mediation, recovery readiness services, harm reduction services, , counseling, entitlement programs assistance, legal assistance, transportation, tenant rights education.
- Supportive services will also provide tenants with resources on and referrals to {fill in what you plan to provide-this is just a possible list}
 - employment and educational opportunities, transportation, nutrition and food services/pantries, emergency assistance programs and financial budgeting resources, legal services, primary care and physical health care, pain management, mental health services, dental care, substance abuse counseling, medication assisted treatment, childcare.
- Provide crisis and de-escalation interventions
- Meet with property management staff weekly to review any current residents at risk of eviction and the progress/success of housing retention plan in progress.

Leaseholder Education Practices

The property management team will educate residents at lease signing and provide a quarterly course explaining the residents' obligations within the lease and answering any questions in an open forum for residents to attend.

{Optional—a possible opportunity with local legal aid orgs} Through partnership with the [fill in legal aid organization] the property hosts monthly legal education workshops with topics focusing on tenants' rights and responsibilities, among other topics.

Role of the Housing Retention Plan

Property management and services staff use their weekly meetings to review tenants identified by property management to have lease violations or those behind on rent/utility bills. The Housing Retention plan will be utilized when a resident has not met an obligation within the lease and supportive interventions are needed to assist with eliminating future lease violations. Resident, property manager, and services staff come together to identify the lease issue and what is required to remedy the issue. Then services staff and tenant identify steps and create a retention plan. All parties will meet at agreed upon timelines to determine if the plan is working, if it needs to be updated, and if resident has met required lease obligations. The goal is resolution of any lease violations or past due payments to ensure housing stability.

Strategies for Mitigating and Responding to Common Lease Violations

Property management and service provider will employ the following strategies to prevent and address lease violations:

1. Education at lease signing and on an ongoing basis will help avoid lease violations through clear communication of obligations to remain in compliance with the lease agreement.

2. If a tenant has violated a material lease provision or engaged in nonpayment of rent, property management will provide the tenant with a lease violation and share the violation with the services staff.
3. The first step in addressing the lease violation will be verbal contact with the resident to address the concern and invite them to meet with management and support services (if they desire). Some issues can be quickly addressed through verbal communication and do not require an in-person meeting or an immediate housing retention plan.
4. During the in-person meeting, property management will clarify the current lease compliance issue(s) with the tenant and with the support of supportive services help the tenant understand what issue or action led them to receive the notice. Supportive Services and Property management identify options for the tenant based on the situation and possibly move towards implementing a housing retention plan.
5. When an issue is more complicated or persists, housing retention plans will be used to clearly track communication, improvements, and future plans to avoid repeat violations. Create retention plans with residents to address lease violations that may include {add your own examples}:
 - a. Rent related violations: payeeship, repayment plans, resource list for residents to request rent relief, waiving of late fees and additional costs when a plan is followed successfully, provide financial and budget education
 - b. Housekeeping Issues: property management can set up a unit inspection schedule to assist with accountability; services staff will engage with tenants to address housekeeping issues and teach skills; partner with other organizations that will teach residents housekeeping skills and life skills to maintain a clean and healthy environment.
 - c. Noise/Nuisance issues: property management and services staff will meet with residents to ask questions to understand the root cause of the issue that resulted in a violation. Include outside partners who can assist with the root cause (i.e. child care for children who are legally able to be at home alone but are causing too much noise; Smoking cessation programs available); harm reduction interventions (self-identified quiet times and guest policies)
 - d. Pet Violations: Provide education on companion/support animal rules and provide resources; Partner with an organization that offers free/low cost pet training, supplies, vaccines; create dog walk and waste area on property; provide waste collection bags
6. Property management and supportive services staff will staff tenant at weekly {fill in your frequency} team meeting to ensure all efforts are being made to maintain housing.
7. All parties will meet at agreed upon timelines to determine if the housing retention plan is working, if it needs to be updated, and/or if resident has remedied the lease violation(s).
8. When lease violations continue, despite all attempts through housing retention plans and supports, and the team feels resident vacating the unit is the final option, then the team will execute the following Eviction Protocol.

Eviction Protocol & Steps:

The eviction protocol process will only be used when all other eviction prevention interventions have been utilized and all partners agree that exiting the property is the only option. When possible, the

property will work with the tenant to allow them to vacate without a formal eviction and the service provider will work with them to find alternative housing to avoid a return to homelessness.

1. The Eviction Prevention Committee {The Eviction Prevention Committee includes members from Property management company and services provider who are not working with the resident at the property level-fill in the staff titles/positions that will comprise the EP committee} will review information in the tenant's file, including all eviction prevention efforts, and talk with involved parties, to determine if tenant will be required to vacate the unit.
2. If vacating the unit is determined, A Notice to Vacate or a Notice of Eviction will be served to the resident. At that time staff will work with them to identify ways to avoid formal eviction and a timeline, such as referrals to other housing in the area, early lease termination, non-renewal of their lease, and settling the eviction outside of court.
3. At the same time, staff will inform tenant of their right to appeal the decision, and that they have {10 days-fill in your timeline} to appeal and instructions on how to do so.
4. Appeals for non-formal and formal evictions will be reviewed by {fill in which staff positions from your agencies—i.e. Property management Regional Manager, Regional Vice President, service provider Chief Operating Officer}. Property management will coordinate with service provider to provide a response in writing to the resident within 10 days.
5. If the resident doesn't file an appeal or vacate through informal means within the established timeline the property can file for a court ordered eviction.
 - i. The final decision to file for eviction with the court will come from {must be a member(s) of executive leadership from either the PM or services agency-fill in the title of staff who will be making the final eviction determination} after evaluating the written recommendation from the Committee. All recommendations must have a written justification which should include the following:
 - The lease violation(s) that occurred by the tenant
 - Eviction prevention and mitigation efforts that were used
 - Why the eviction is the only/final option

*Emergency eviction procedures: Any resident who has demonstrated actions that are an imminent threat to other residents or associates of {enter Property management and service provider}, or the property will be evicted immediately upon approval from the Committee and other required parties and may not be given the opportunity to move informally. This will only exist in situations when all parties agree the resident needs to vacate the property immediately.

Individualized Housing Retention Plan

Information Coversheet

Tenant Name: _____
 Lease Term: _____

Identifier/Address: _____

History of Notifications:

Ref #	Date of Lease Violation	Violation	Action Taken
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			

Include here a standardized summary of the role of housing retention plans in the property's eviction prevention efforts. This summary may be used to describe the purpose of the housing retention plan as a tool to address lease violations when meeting with tenants.

Housing Retention Meeting and Strategy Worksheet

A new workflow should be completed for each lease violation. For lease violations where multiple meetings/violations are involved, the staff member(s) conducting the meeting and date of meeting must be noted and documented for the corresponding workflows.

- **Lease Violation:** Clearly describe the lease violation, focusing on the violation as the central issue being addressed in this meeting. Include the reference number assigned to the lease violation in Section 1.
- **Education:** If necessary, review the section of the lease that was violated. Review the tenant's rights and responsibilities in terms of receiving notice, correcting the issue, participating in, or failing to participate in, a housing retention plan, etc.
- **Actions:** Share with the tenant what actions the property requires the tenant to take to correct the issue and discuss whether the tenant anticipates that they will need additional supports to make these changes. Additional supports may include being connected to a cleaning service; engagement with a community partner for assistance with medical, mental, or behavioral health needs; support from the property for enforcement of security/trespass policies; receipt of a payment plan and coaching for the payment system, etc. Clearly describe who will complete each action and the expected timeline for completion.
- **Follow-up:** Determine whether any follow-up is needed, and if so, when/where/how it will occur, what actions should be taken by the time of the follow-up, and by whom.

Name of Staff Member(s): Date of Meeting:

Lease Violation (Ref #)	Education	Actions	Follow-Up

Name of Staff Member(s): Date of Meeting:

Lease Violation (Ref #)	Education	Actions	Follow-Up

Name of Staff Member(s): Date of Meeting:

Lease Violation (Ref #)	Education	Actions	Follow-Up

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Lease Violation (Ref #)	Education	Actions	Follow-Up

Name of Staff Member(s): Date of Meeting:

Lease Violation (Ref #)	Education	Actions	Follow-Up

Individualized Housing Retention Plan: Check-in Worksheet

Tenant Name:		Identifier/Address:	
Staff Member:		Date:	

Action Item Report-Out:

Is the issue resolved? Yes No

If not resolved, clearly describe the actions required to resolve the lease violation, the date by which the resolution must occur, and supports to be provided, if applicable:

If resolved, describe any additional actions that the tenant, property, or partners intend to pursue individually or jointly to prevent future lease violations, if applicable:

Follow-up Meeting Scheduled: No Yes Date of Next Meeting:

Other comments: