



# Partnership Description

Partners4Housing (P4H) helps families of adults with Intellectual and/or Developmental Disabilities (I/DD) create shared living solutions. To that end we have built:

A

### **A Residential Assessment (RA)**

a person-centered, 125 question, online, futures planning tool

- Identify support needs (not diagnoses)
- Maximize benefits
- Articulate family's vision and values
- Reviewed by a Solutions Coordinator
- Actionable advice
- Assesses fit for the Roommate Matching Pool

B

An online **Roommate Matching Pool**, where parents may find compatible roommates and parents with whom to create a shared living home.

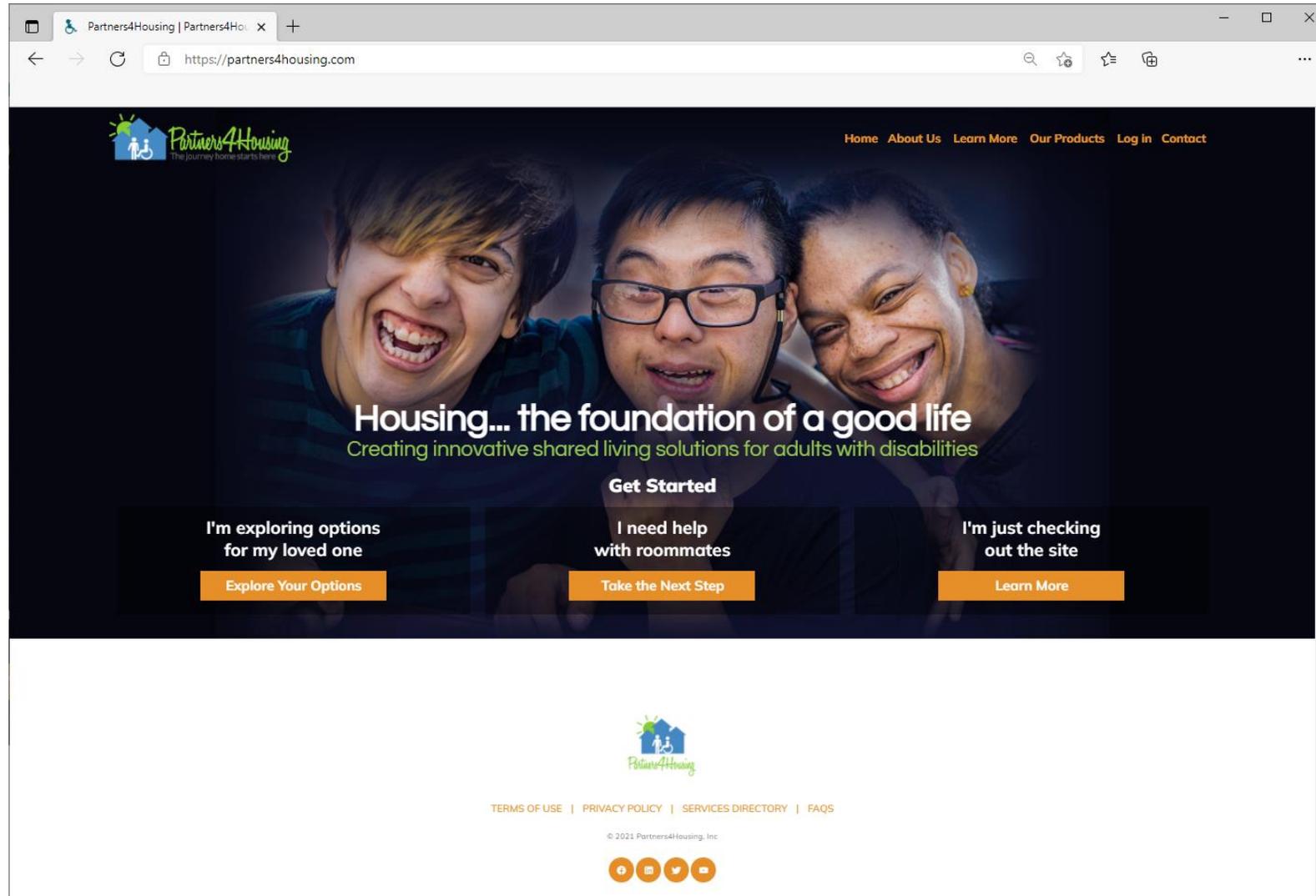
C

**Shared Living Development (SLD)**, a series of actionable steps and agreements that bring the vision of shared living to life in a way that is achievable by families

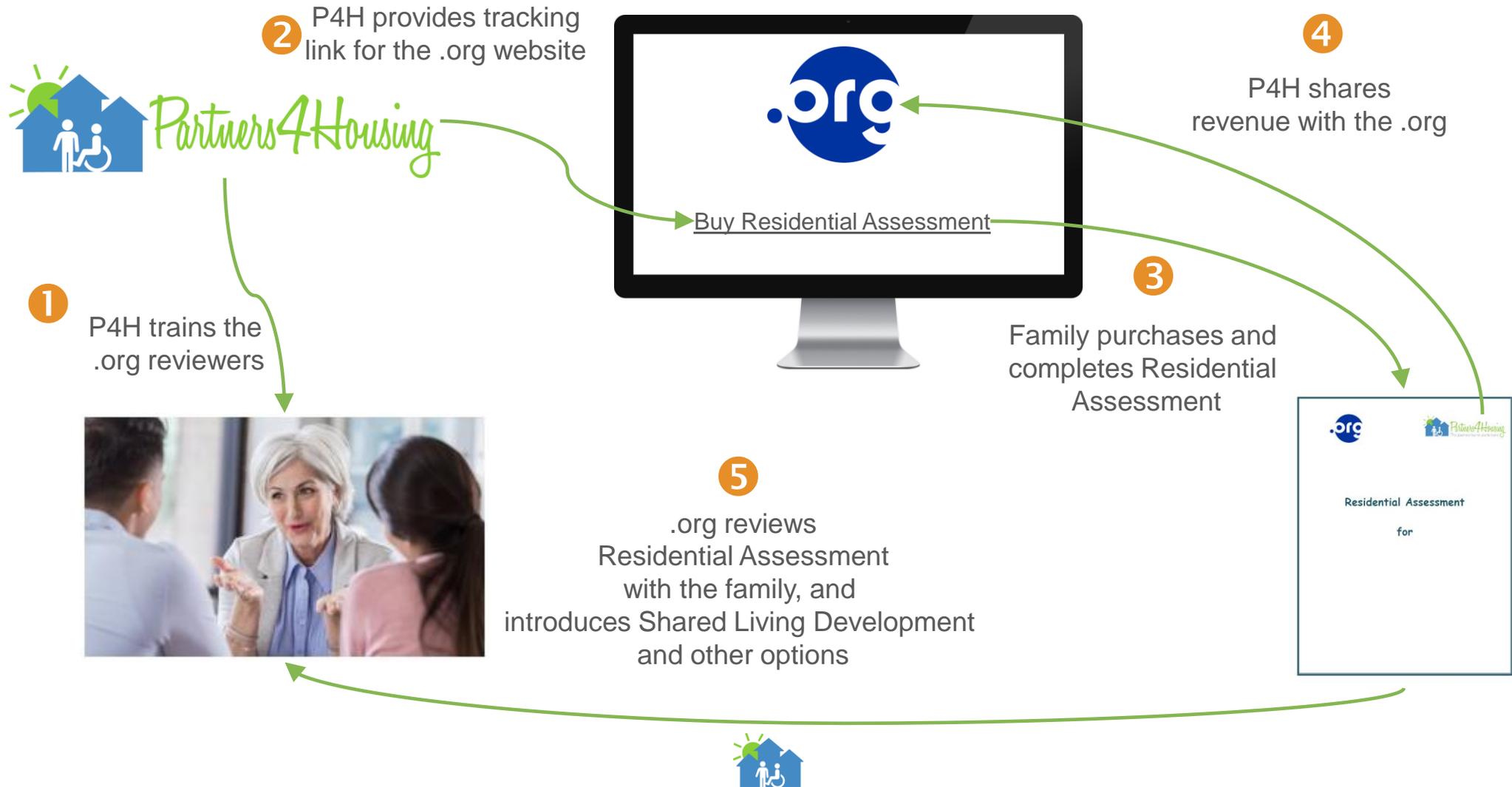
Families find value in the Residential Assessment, by itself; for identifying gaps in benefits, getting “unstuck” from the paralysis of not knowing what they don't know, and as a futures planning tool



After the relaunch of our website, we were approached by several nonprofits who asked if we could train them to perform the residential assessments



We created a partnership model to train Solution Coordinators to conduct Residential Assessment reviews and share revenue with them



# Training consists of a 20-hour curriculum of in-class and action-learning material

## Day 1

**A**  
Prep for Session 1 (2 hrs)

- Watch webinar
- Log in as member
- Complete and submit RA
- Log in as Solutions Coordinator
- Review FAQs on website

**B**  
Session 1 (90 min)

- General Overview
- Our Methodology
- Trainee reads Brett RA
- Walk through of RA review sheet for Brett

**C**  
Prep for session 2 (2 hrs)

- Read RA and complete review sheet for Ann
- Watch consultation video
- Add post-consult notes
- Prepare to discuss in class

**D**  
Session 2 (90 mins)

- Trainee discussion of Ann
- Building trust
- Intro to SLD
- Matching pool walk-thru

**E**  
Prep for Session 3 (1.5 hrs)

- Watch HubSpot videos and take quizzes

**F**  
Session 3 (90 mins)

- CRM
- Admin portal

**G**  
Prep for Session 4 (2 hrs)

- Review RA and complete review sheet for Cam
- Watch consultation
- Add post-consult notes
- Prepare to discuss in class

**H**  
Session 4 (90 mins)

- Trainee discussion of Cam
- Case study
- Wrap up questions

## Day 2

## Shadowing (post-sessions)

**I**  
Shadow 1 (comp friendly)

- SC complete RA review
- P4H comments
- Joint SC/P4H consult
- Postmortem with P4H

**J**  
Shadow 2 (comp friendly)

- SC complete RA review
- P4H comments
- One SC leads consult
- Postmortem with P4H

**K**  
Shadow 3

- SC complete review
- P4H comments
- Other SC leads consult
- Postmortem with P4H

**L**  
Video reviews

- Send P4H review sheets
- P4H reviews next 4 consultations (2 each SC, both participate)



Training includes videos of an introductory webinar and real Residential Assessment reviews

Webinar



“Kit”



“Ann”



“Cam”



# We launched with our first partner in May

<https://mmjccm.org/adults/special-needs/residential-assessment>

We signed our revenue share agreement with MMJCCM on 5/1/21

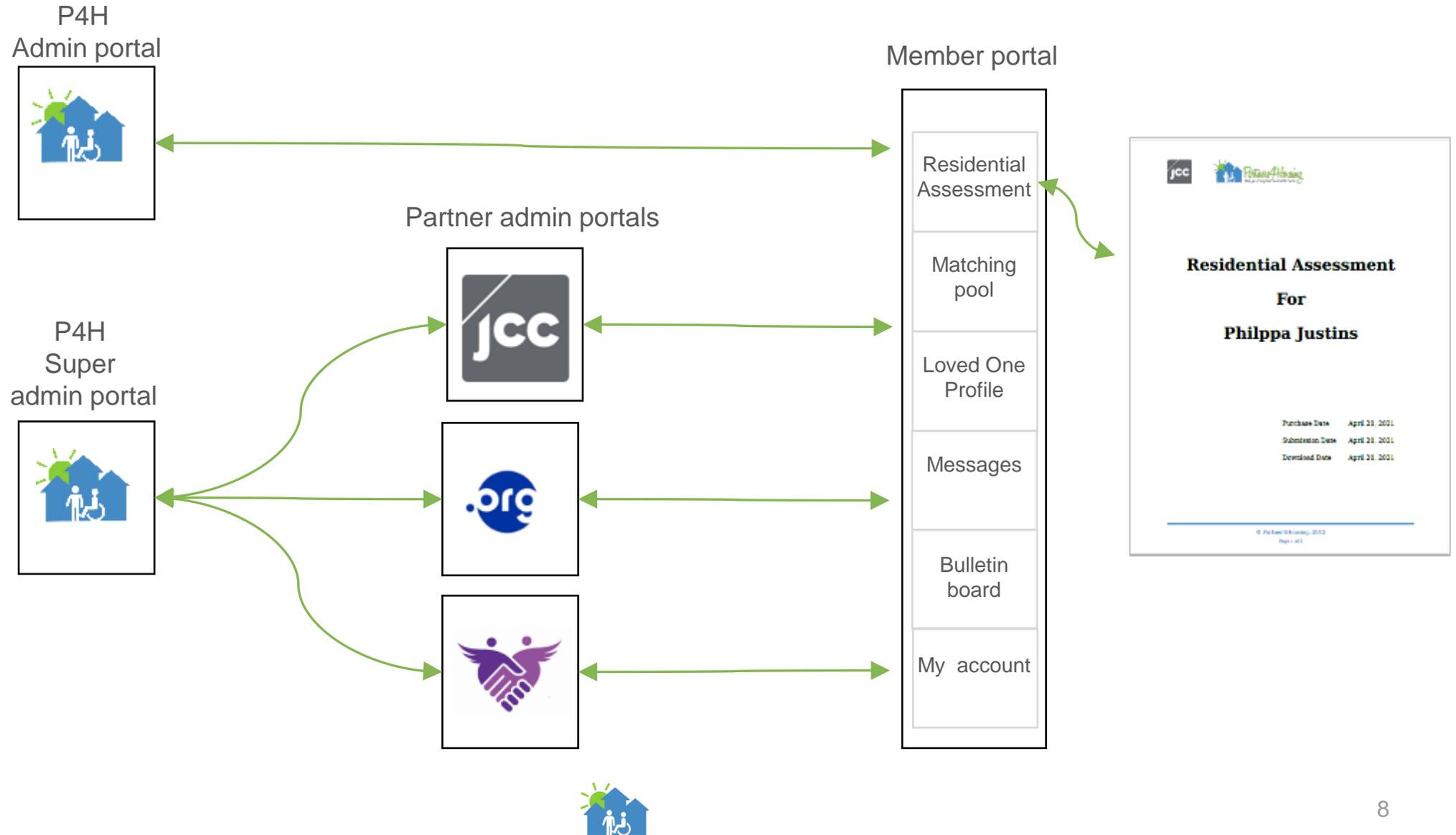
70+ people attended our first two webinars, and 35 have signed up

The screenshot shows a webpage for 'Partners4Housing Information Sessions'. At the top is the logo for 'marlene meyersson jcc manhattan' with the tagline 'THE JACK AND SHIRLEY SILVER CENTER FOR SPECIAL NEEDS'. Below the logo is a cityscape image. The main heading is 'PARTNERS4HOUSING INFORMATION SESSIONS'. The text explains that the sessions are for families and professionals to learn about creating a shared living home. It lists three services: Residential Assessment, Roommate Matching Pool, and Shared Living Development Services. It provides dates for sessions on May 12 and 13, and a link to register. A quote from Pam Blanton, founder and CEO, is included. At the bottom, there are social media icons, a 'JOIN' button, and contact information for Marlene Meyerson JCC Manhattan.

The screenshot shows a press release titled 'Partners4Housing to Partner with Marlene Meyerson JCC Manhattan'. The text announces that Partners4Housing has been selected by the Marlene Meyerson JCC Manhattan (MMJCCM) to offer a comprehensive solution for families with loved ones with Intellectual and/or Developmental Disabilities (IDD). It describes the online Residential Assessment process and roommate matching portal. A quote from Allison Kleinman, Director of the Jack and Shirley Silver Center for Special Needs, is included. Another quote from Pam Blanton, founder and CEO of Partners4Housing, is also present. The press release concludes by stating that the DDPC funding allowed Partners4Housing to create training material and train two of the MMJCCM staff to act as Solution Coordinators.



To support the revenue share model, we added backend functionality to scale and co-brand our services



# The new Partner portal allows partners to administer their members

**JCC**

MEMBERS

Members

ADD MEMBER

First Name	Last Name	Email	Phone	Zip	Loved One	Profile	Online	Active	Actions
Johann	Pollich	alf36@example.net	778-619-7491	60034	Dolly Adams	Rowland77	Yes	No	<a href="#">VIEW DETAIL</a>
Catharine	Carroll	cassandra.gislason52@example.com	509-863-4838	64062	Eugene Zieme	Skyla.Keefe73	Yes	No	<a href="#">VIEW DETAIL</a>
Annamae	Roob	ignacio68@example.net	227-643-5852	76804	Adela Schaefer	Alberto_Weissnat	Yes	No	<a href="#">VIEW DETAIL</a>
Rusty	O'Reilly	kenya_berge@example.net	966-493-7904	75201-4435	Hilma Heidenreich	Vicky33	Yes	No	<a href="#">VIEW DETAIL</a>
Lonny	Beier	jamison.kozey@example.com	664-246-2637	25675-6687	Queenie Hartmann	Melyna74	No	No	<a href="#">VIEW DETAIL</a>
Jessika	Ondricka	piiper44@example.net	522-670-6460	47259	Aglae Raynor	Wanda_Schultz	Yes	No	<a href="#">VIEW DETAIL</a>
Rachael	Reynolds	jeffry_dietrich@example.org	432-309-7430	27546-8483	Pattie Reinger	Alessandro.Russet	Yes	No	<a href="#">VIEW DETAIL</a>
Ashleigh	Welch	vallie50@example.net	423-669-3087	64962	Felicita Durgan	Fausto_Kohler	Yes	No	<a href="#">VIEW DETAIL</a>
Marisa	Kuhn	delmer37@example.org	384-678-8645	16081	Dock Stroman	Allie30	No	No	<a href="#">VIEW DETAIL</a>
Erick	Schroeder	donavon.hermann34@example.net	827-960-0049	09724-0093	Salma Hammes	Toni_Marvin	No	No	<a href="#">VIEW DETAIL</a>
Marisa	Kozey	omari77@example.com	969-567-6517	90553	Quinton Abernathy	Rosie_Auer61	Yes	No	<a href="#">VIEW DETAIL</a>
Evert	Bechtelar	amelia.brueen@example.net	616-411-2893	35601	Sabrina Cuska	Araceli.Lind	Yes	No	<a href="#">VIEW DETAIL</a>

MW

DASHBOARD

MEMBERS

LOVED ONES

MATCHING POOL

BULLETIN BOARD

CONVERSATIONS

Partners4Housing  
The journey home starts here.

BH



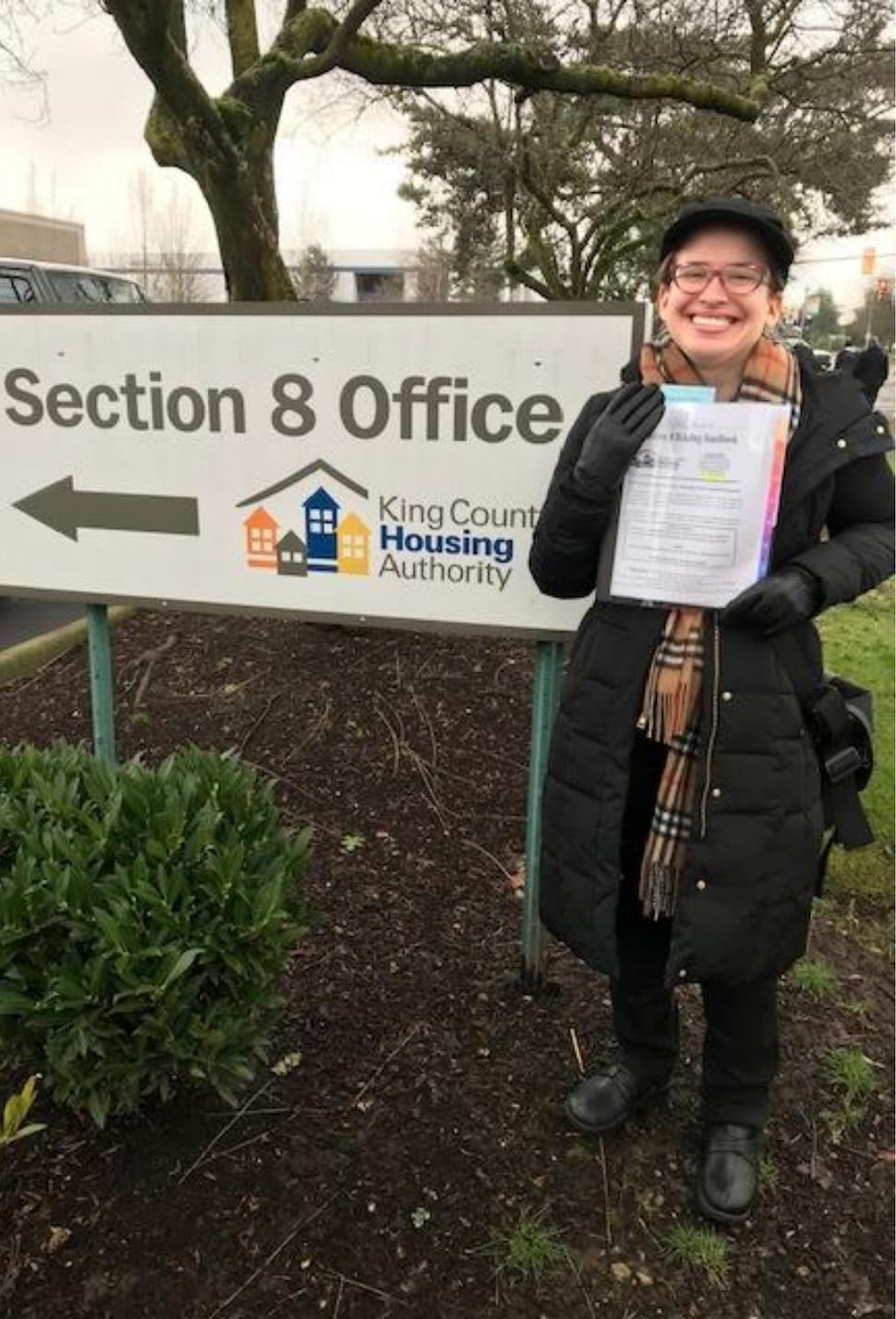
# The new P4H portal allows us to administer our Members and our Partners

The screenshot displays the P4H portal interface. On the left is a dark purple sidebar menu with the P4H logo at the top. The menu items are: DASHBOARD, MEMBERS, LOVED ONES, MATCHING POOL, BULLETIN BOARD, MESSAGES, PARTNER MANAGEMENT, SUMMARY, RA QUESTIONS, WORD DOC CONFIG, and SUPER ADMIN. A red box highlights the 'Admin' section (DASHBOARD through MESSAGES) and the 'Super admin' section (PARTNER MANAGEMENT through SUPER ADMIN). Green boxes on the left label these sections. The main content area is titled 'PARTNERS' and contains a table of partner information. The table has columns for Name, CRM Team, State, Main Contact First Name, Main Contact Last Name, Email, and Actions. There are 7 rows of data. At the bottom right of the table, it says 'Rows per page: 20' and '1-7 of 7'.

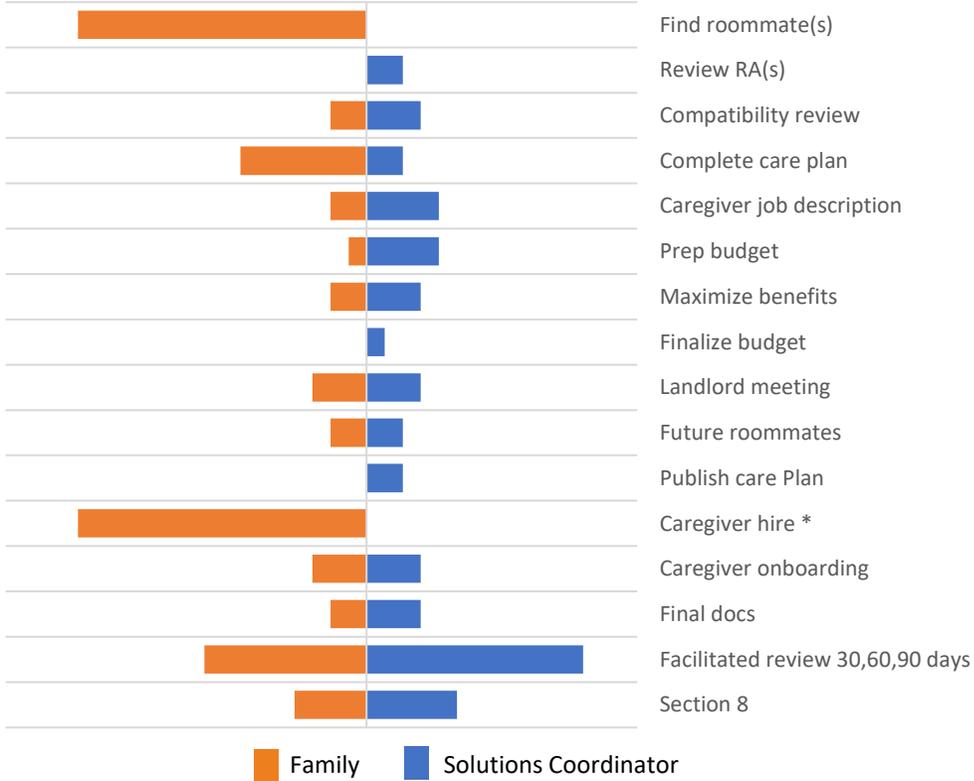
Name	CRM Team	State	Main Contact First Name	Main Contact Last Name	Email	Actions
JCC	MMJCCM	NY	Caitlin	McInerney	cmcinerney@mmjccm.org	<input type="button" value="🔍"/> <input type="button" value="🗑️"/>
MJW	Alsace	WA	Max_test	Wells	partnerp4hstest@gmail.com	<input type="button" value="🔍"/> <input type="button" value="🗑️"/>
NES	Alsace	WA	Vanessa	Reinhardt	vanessa@partners4housing.com	<input type="button" value="🔍"/> <input type="button" value="🗑️"/>
WDS	Alsace	NC	Carol	Pearson	caroljeanpearson@gmail.com	<input type="button" value="🔍"/> <input type="button" value="🗑️"/>
PAM	alsace	WA	Pam	Blanton	pam@partners4housing.com	<input type="button" value="🔍"/> <input type="button" value="🗑️"/>
DTM	DTM	WA	test_demo	Coordinator	testdemocoordinator@hotmail.com	<input type="button" value="🔍"/> <input type="button" value="🗑️"/>
PCE	PEACE	WA	Daria	Heit	dariah@peacenw.org	<input type="button" value="🔍"/> <input type="button" value="🗑️"/>



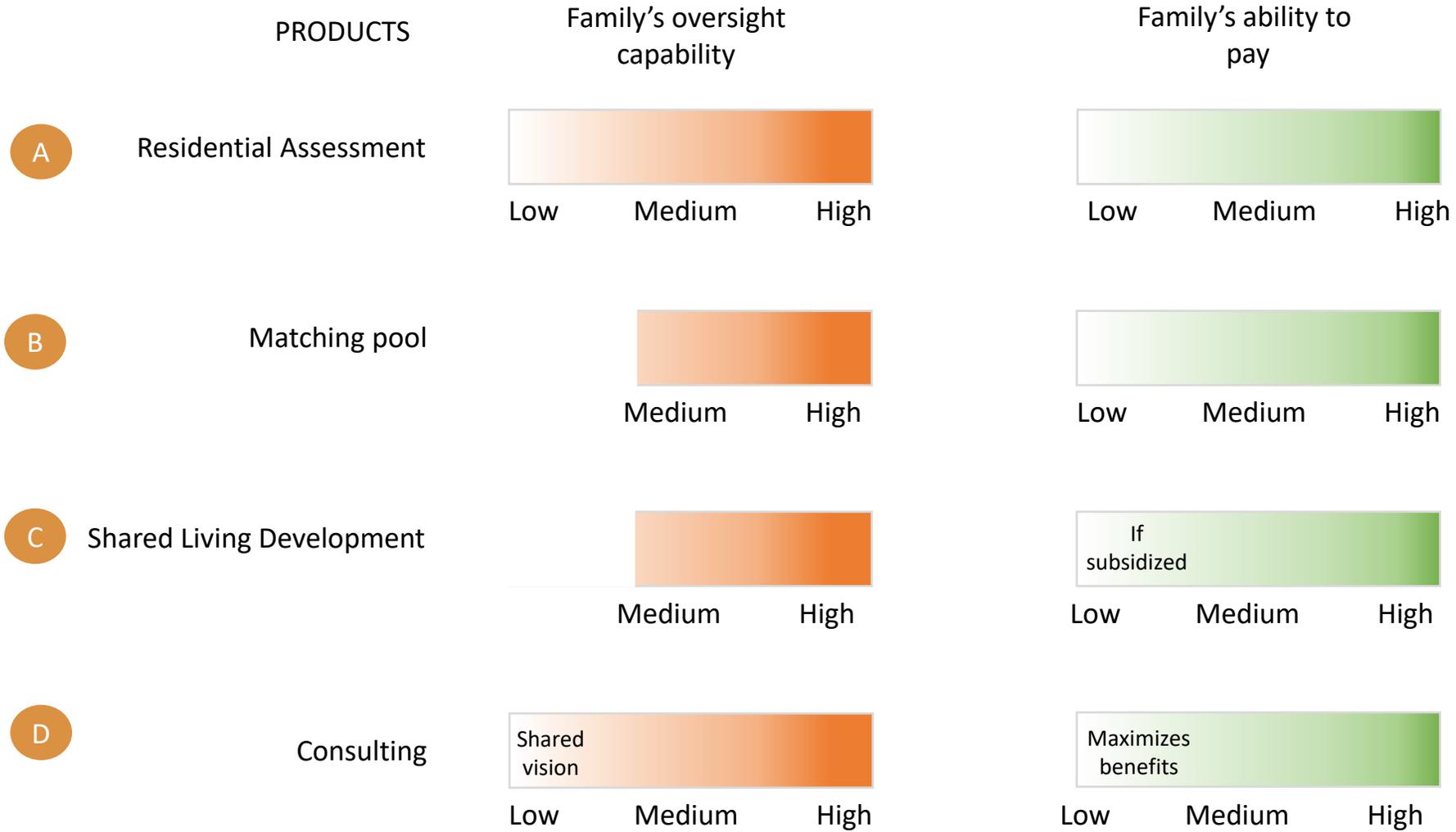
Shared Living Development is a scalable, proven process to set up a viable shared living home. It relies on the parents being active participants in the process.



Shared Living Development tasks and relative effort



# Our products provide benefits for a broad range of family circumstances



# Requirements and Product Description

## Requirements

1. We require partners to have some domain knowledge for their State, including housing options, I/DD support services (how to access and maximize), and other support services
2. Partners don't have to have all the answers. You will be trained on the benefits review. Over time you'll expand your knowledge of housing and support services, and your contact list of referral resources.
3. Partners must have empathy and the ability to establish trust. Also, the capacity to identify actionable steps and explore housing visions and leave families feeling hopeful for the future.
4. Training fee – We charge \$5,000 to cover our time and connectivity costs. Some of our partners have obtained this through grants. (DD council grants, Autism Speaks etc. 9/15.)

## Product Description

- 20 hours of training – remote, up to 8 people/class (\$5k/class)
- IT connectivity
  - HubSpot CRM – place to track interactions with your people and automate some of the processes. We pay for an Enterprise version; you get to use it for free.
  - Member portal – where the people you sign up go to complete the RA, and when invited, to access the matching pool, message other families etc.
  - Admin portal – a web-based view of the backend of the member portal, so you can view the RA, turn people on and off, and perform other administrative tasks.
- Comprehensive agreement describing the responsibilities, expectations and contingencies for each party

## Other Resources

- Website – for description of products  
<https://partners4housing.com/products>
- Product terms of use  
<https://partners4housing.com/terms-of-use>
- Demo matching pool (users must complete a Residential Assessment and be invited before joining our actual Roommate Matching Pool)  
<https://demo.partners4housing.com/>



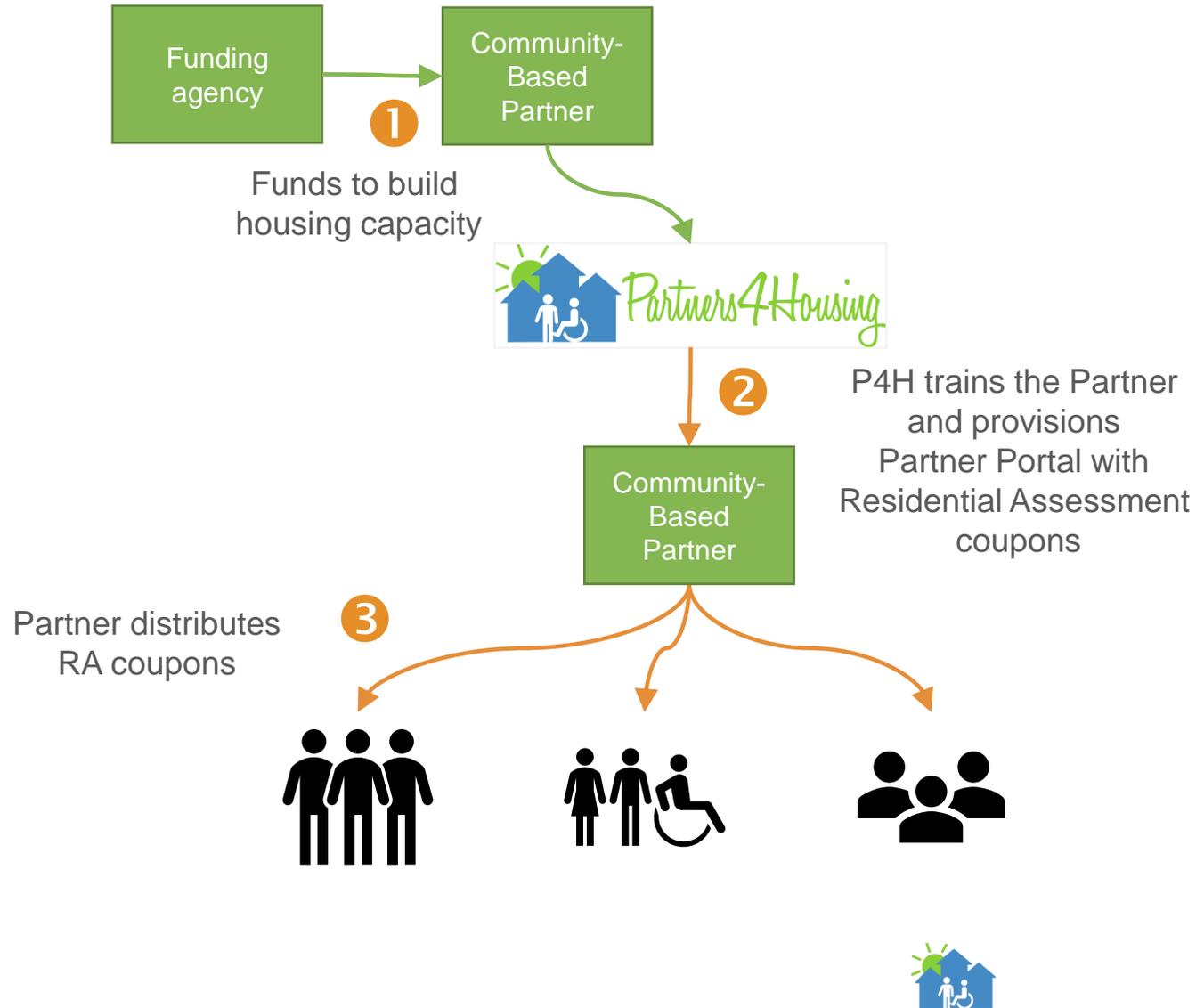
An additional benefit of building increased housing capacity is a source of continually updated, standardized and comprehensive data on the housing needs of individuals with I/DD

### Data made possible by the Housing Support and Data Infrastructure (HSDI)

1. Relationship of person providing information
2. Relationship to person with disability
3. Gender
4. Age
5. Current zip
6. Desired zip
7. Employed
8. Hrs worked /week
9. Participates in day program
10. Amount paid in rent
11. Job coach (y/n)
12. SS benefits
13. Gross income
14. Medicaid
15. Food benefits
16. Eligible for state services
17. State services sufficient to meet needs?
18. Other services (mental health, DVR, services for the blind etc.)
19. Section 8
20. Level of support required
21. Ability to communicate verbally/other means of communication
22. How support needs are currently being met
23. Wheelchair accessibility required
24. Mode of transportation
25. Type of housing desired
26. Interested in purchasing
27. Interested in long term lease
28. Desired geographical location
29. When ready to move
30. Estate plan
31. Worked with financial planner
32. Special needs trust
33. ABLE account
34. Family financial resources
35. Race
36. Ethnicity
37. Language spoken at home



# Building community-based housing capacity by partnering with Partners4Housing



## Benefits of increased capacity

- More community-based organizations trained to support families with housing
- Alternatives to core waivers as a means of housing individuals with I/DD
- More families in the matching pool, encourages more families in the matching pool
- Decreased incidence of costly crisis-mode interventions