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 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

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

**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.

1. P4H trains the .org reviewers.

2. P4H provides tracking link for the .org website.

3. Family purchases and completes Residential Assessment.

4. P4H shares revenue with the .org.

5. .org reviews Residential Assessment with the family, and introduces Shared Living Development and other options.
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

**Day 2**

**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

**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.
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
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

<table>
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<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Email</th>
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<th>Zip</th>
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The new P4H portal allows us to administer our Members and our Partners.
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.
Our products provide benefits for a broad range of family circumstances

<table>
<thead>
<tr>
<th>PRODUCTS</th>
<th>Family’s oversight capability</th>
<th>Family’s ability to pay</th>
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<tbody>
<tr>
<td>Residential Assessment</td>
<td>Low, Medium, High</td>
<td>Low, Medium, High</td>
</tr>
<tr>
<td>Matching pool</td>
<td>Medium, High</td>
<td>Low, Medium, High</td>
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<td>Shared Living Development</td>
<td>Medium, High</td>
<td>If subsidized</td>
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<td>Consulting</td>
<td>Shared vision, Low, Medium, High</td>
<td>Maximizes benefits</td>
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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

1. Funds to build housing capacity
2. P4H trains the Partner and provisions Partner Portal with Residential Assessment coupons
3. Partner distributes RA coupons