

# **Oregon Real Choice Housing Fund:**

*A Report on a Demonstration Project Assisting Mental Health Consumers to  
Obtain and Maintain Integrated Community Housing*

June 2006



Office of Mental Health and Addiction Services

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## Acknowledgements

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## Executive Summary

The Real Choice Housing Fund was established with funding from a grant from the Centers for Medicare and Medicaid Services. The goal of the Real Choice Housing Fund was to provide financial assistance to help persons with severe and persistent mental illness to obtain or retain integrated community housing.

A total of \$266,227 in Real Choice Housing Fund assistance was allocated as grants or loans to consumers throughout Oregon. A total of 651 consumers received assistance averaging \$409 from July 2003 to September 2005. An analysis of data collected included the following findings:

- These small amounts of assistance enabled 36% of recipients to move to more integrated community housing and an additional 63% to retain their existing type of community housing.
- Three months after receiving assistance, 88% of contacted recipients, a total of 462 individuals, were still in their community housing.
- Of the 870 expense items covered by Real Choice Housing Fund assistance, cleaning and security deposits were most common, followed closely by rent payment assistance. The third most common use of funds was for first and last months' rent.
- A total of 133 individuals were homeless prior to receiving assistance; of the 133 individuals, 84% were able to move into a private home or apartment (either alone or with others) as a result of the Real Choice funds.

These findings demonstrate that the Real Choice Housing Fund was successful in providing financial assistance to remove barriers and enable people with severe and persistent mental illness to obtain or retain more integrated community housing.

## INTRODUCTION

In 2001, Oregon's Department of Human Services, through its Office of Mental Health and Addiction Services (OMHAS), was awarded a three-year Real Choice (RC) System Change Grant from the federal Center for Medicare and Medicaid Services. "Real Choice" grants seek to assist states with making infrastructure changes that promote independence, integration and choice, for people with disabilities and implement the federal *New Freedom Initiative*. Oregon's grant provided funding for a variety of system change efforts and demonstration projects with the goal of promoting person-centered services and enhancing integration for people with psychiatric disabilities.

One objective of Oregon's Real Choice Grant was to address housing needs and homelessness. Grant funds were used for two limited duration staff positions and a \$260,000 Real Choice Housing Fund demonstration project.

The idea for the Real Choice Housing Fund arose because some residents of residential treatment facilities and other structured settings faced financial barriers that prevented their move to more integrated housing settings. These barriers arose due to a lack of financial resources to pay for move-in costs such as application fees and security deposits. Some individuals who made it to the top of the waiting list for a Section 8 rent subsidy had to turn back the Section 8 voucher because they could not afford the costs of moving to an apartment. Relatedly, consumers who were living in an integrated setting are sometimes confronted with a one-time expense or misfortune that results in their inability to pay rent or make repairs, and leads to the subsequent loss of housing.

The goal of the Real Choice Housing Fund was to provide financial assistance to help persons with severe and persistent mental illness to obtain or retain integrated community housing. This financial assistance was in the form of grants or loans to address financial barriers that would otherwise prevent access to integrated housing or result in loss of such housing.

## METHODOLOGY

The structure of the Real Choice Housing Fund was created with input from the Real Choice Consumer Advisory Council. In January 2003, Community Mental Health Programs (CMHPs) were invited to apply for a pro-rated share of the Real Choice Housing Fund. Application materials were distributed (see Attachment A)

with a due date of March 7, 2003. Applications were received from all parts of the state except for one county.

A panel including representatives from the Real Choice Consumer Advisory Council and OMHAS reviewed applications. Applications were rated according to established criteria. Funds were awarded to applicants with passing scores. Some of these award decisions were made subject to conditions that would ensure consistency in approach across counties and consumer involvement in the administration of the local funds. Applicants that did not meet the minimum scoring criteria were invited to submit additional information to correct application deficiencies. Eventually, applications were approved to cover all areas of the state for which applications were submitted.

Beginning in April 2003, award letters were distributed. Award letters outlined any conditions that needed to be met prior to the release of Real Choice Housing Funds to CMHPs for distribution to consumers.

Because the Real Choice Housing Fund was a demonstration project, guidelines were developed to assure consistent implementation of the fund across Oregon (see Attachment B). CMHPs were also required to implement an application process, maintain records and track descriptive data on consumers who received financial assistance. Follow up contact with consumers was required for three months to determine whether they remained in the housing for which the financial assistance was provided. This data was submitted in reports to OMHAS on a quarterly basis.

The time period for implementation of the Real Choice Housing Fund was originally planned to be May 2003 through December 2004. However, due to award conditions and contracting difficulties, actual start-up of the Real Choice Housing Fund was delayed and phased in at varying intervals. The first CMHPs began providing Real Choice Housing Fund assistance in the July 2003. The provision of all assistance was completed by the end of September 2005.

## RESULTS

Data from quarterly reports was compiled and analyzed. Findings presented below include descriptive information on consumers assisted by the fund, the distribution and use of funds and outcomes produced.

Descriptive Information on Consumers Assisted by the Fund. A total of 651 consumers were assisted through the Real Choice Housing Fund. Slightly more females than males were assisted. The average age of individuals assisted is 41 years old. The ethnicity of assisted individuals roughly mirrors the ethnic composition of Oregon's population enrolled in mental health services.

**Table A: Descriptive Data on Consumers Assisted with RC Housing Funds (N = 651)**

<b>Sex</b>	
% Female	58%
% Male	42%
<b>Age</b>	
Average	41 years
Range	10 to 73 years
<b>Ethnicity</b>	
White	80.5%
Black or African/American	7.0%
Multi-racial	7.0%
American Indian/Alaskan Native	2.5%
Hispanic/Latino	2.0%
Asian/Pacific Islander	1.0%

Of the 651 individuals assisted, seventeen received assistance more than one time. These individuals experienced additional financial barriers after the initial assistance and were awarded additional funds in order to continue to retain their housing.

Distribution and Use of Real Choice Housing Funds. Participating CMHPs were awarded a total of \$270,400. This included \$260,000 for direct Real Choice Housing Assistance and an additional 4% for administrative expenses. Some CMHPs opted to apply their administrative funds to consumer assistance. A small portion of funds were under-utilized and returned to OMHAS. Table A summarizes these data by county.

- A total of \$266,227 was allocated as grants or loans to consumers.
- A total of 651 consumers received assistance from July 2003 to September 2005.

- Assistance provided to consumers ranged from a low of \$14 for a small appliance purchase to a high of \$1,500 to cover first and last months' rent.
- The average amount of assistance received was \$409.

**Table B: Financial Data and Number Served Per County**

<b>CMHP</b>	<b>Amount Awarded</b>	<b>Total Assistance Provided</b>	<b>Total Consumers Served</b>	<b>Average Dollar Amount* Spent Per Consumer</b>
Benton	\$ 4,814	\$ 4,814	<b>9</b>	\$ 535
Columbia	\$ 2,958	\$ 2,809	<b>9</b>	\$ 312
Coos	\$ 6,869	\$ 6,886	<b>17</b>	\$ 405
Crook	\$ 2,107	\$ 1,500	<b>5</b>	\$ 300
Curry	\$ 2,008	\$ 1,973	<b>5</b>	\$ 395
Deschutes	\$ 10,965	\$ 11,050	<b>30</b>	\$ 368
Douglas	\$ 8,547	\$ 8,522	<b>24</b>	\$ 355
EOHSC**	\$ 23,371	\$ 22,224	<b>61</b>	\$ 364
Jackson	\$ 11,542	\$ 12,364	<b>38</b>	\$ 325
Jefferson	\$ 1,984	\$ 1,661	<b>8</b>	\$ 208
Josephine	\$ 11,169	\$ 11,275	<b>22</b>	\$ 513
Klamath	\$ 7,082	\$ 6,965	<b>22</b>	\$ 317
Lane	\$ 30,194	\$ 28,901	<b>74</b>	\$ 391
Lincoln	\$ 5,419	\$ 5,418	<b>14</b>	\$ 387
Linn	\$ 8,962	\$ 8,749	<b>27</b>	\$ 324
Marion	\$ 25,049	\$ 24,217	<b>44</b>	\$ 550
Multnomah	\$ 76,560	\$ 75,819	<b>137</b>	\$ 553
Polk	\$ 3,364	\$ 3,235	<b>12</b>	\$ 270
Tillamook	\$ 2,523	\$ 2,822	<b>11</b>	\$ 257
Washington	\$ 18,629	\$ 18,984	<b>61</b>	\$ 311
Yamhill	\$ 6,284	\$ 6,039	<b>21</b>	\$ 288
<b>Totals</b>	<b>\$270,400</b>	<b>\$266,227</b>	<b>651</b>	<b>\$ 409</b>

\* rounded to nearest whole dollar

\*\* EOHSC (Eastern Oregon Human Services Consortium) represented the following counties: Baker, Clatsop, Grant, Harney, Lake, Malheur, Morrow-Wheeler, Umatilla, Union, Wallowa, Gilliam, Hood River, Sherman, and Wasco Counties.

CMHPs reported that 84% of the assistance provided to the consumers was in the form of a grant. The remaining 16% was given as a loan.



Average award amounts varied considerably by county. Figure 1 illustrates the variability in average award amounts by county. Jefferson County had the lowest average amount (\$208). Multnomah County's average was highest (\$553). This variability may be explained by the higher housing costs in urban areas compared to rural areas.

**Figure 1: Average Award Amounts Per Person By County**

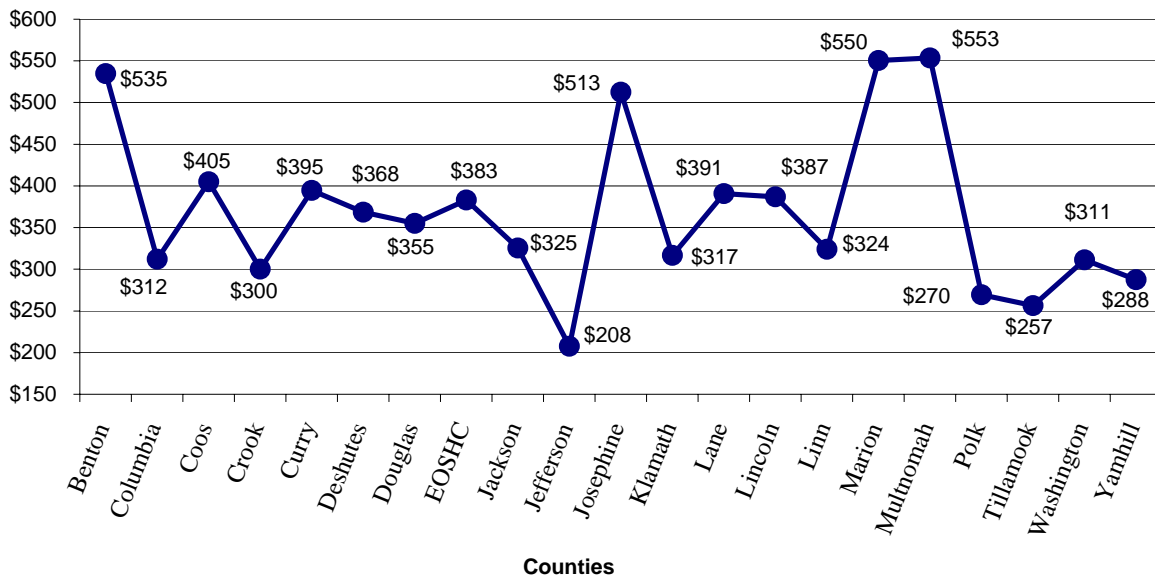
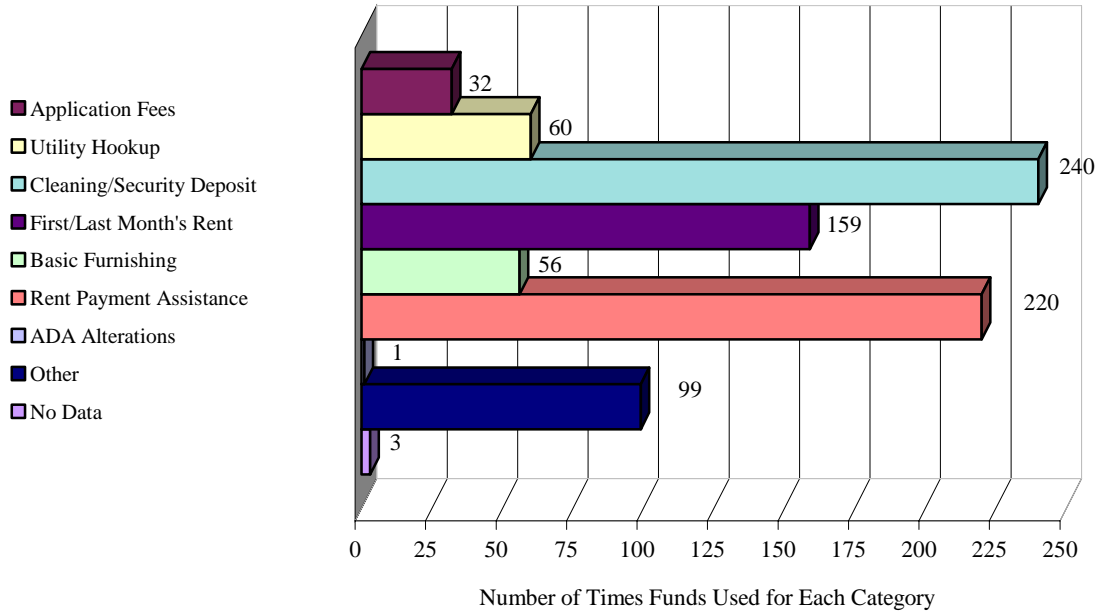


Figure 2 summarizes the uses of Real Choice Housing Fund assistance. Because a consumer could use the financial assistance to cover more than one category of expense related to obtaining or retaining housing, the chart reflects distribution of 870 expense items covered for the 651 recipients. The nine categories were pre-defined in the Real Choice Housing Fund guidelines and listed on the data tracking materials used by CMHPs.

**Figure 2: Expense Categories Covered by Real Choice Housing Assistance**

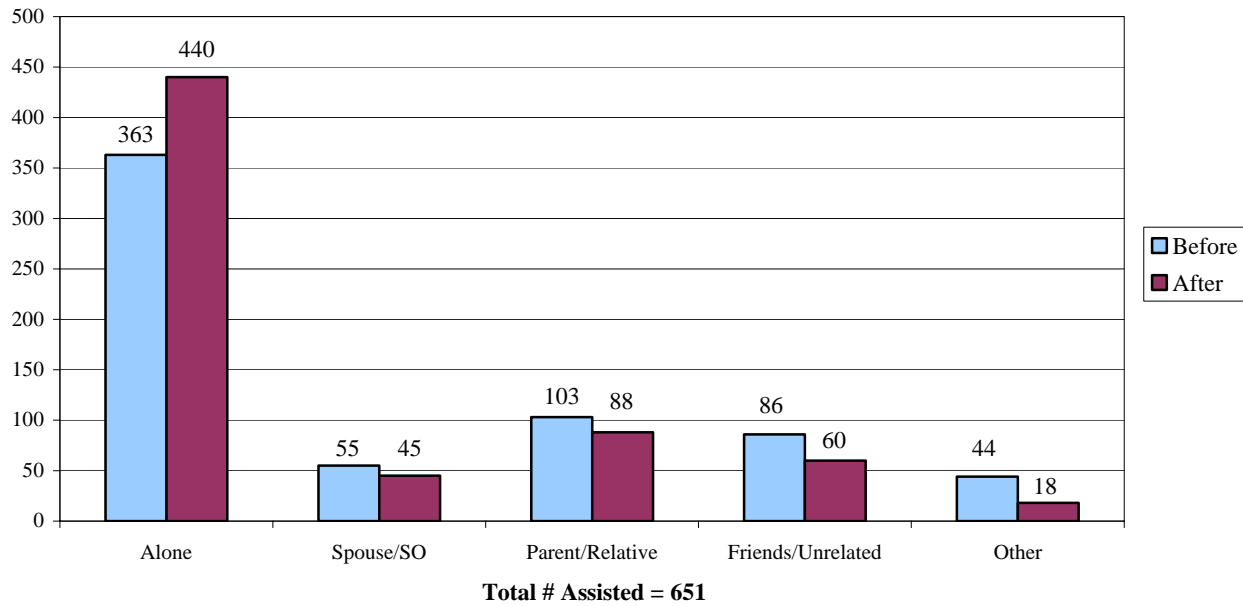


Of the 870 expense items covered by Real Choice Housing Fund assistance, cleaning and security deposits were most common, followed closely by rent payment assistance. The third most common use of funds was for first and last months' rent. Americans with Disabilities Act (ADA) alterations were the most infrequent expense item and were only used once for this purpose.

Outcomes Realized as a result of the Real Choice Housing Fund. As previously stated, the goal of the Real Choice Housing Fund was to provide financial assistance to remove barriers so people with severe and persistent mental illness could obtain or retain more integrated community housing. In order to assess the extent to which this goal was met, data was analyzed in two ways: (1) consumers' living arrangements before and after assistance were compared; and (2) consumers' maintenance of their new living arrangement was assessed.

With respect to consumers' living arrangements, data was collected on whom the recipient was living with and the type of housing they were living in both before and after receiving assistance. Figure 3 summarizes data on who recipients were living with before and after receiving Real Choice assistance. Figure 3 shows that Real Choice assistance enabled many recipients to move to their own independent housing after living with others.

**Figure 3: Living Arrangement Before and After RC Housing Assistance**



A total of 77 consumers transitioned from living with someone else to a more autonomous living situation. Before receiving assistance, 44% of the consumers were living with a spouse, significant other, parents, relatives or others. After receiving assistance, these living arrangements were reduced to 32% of those assisted.

**Figure 4: Housing Arrangement Before and After RC Housing Assistance**

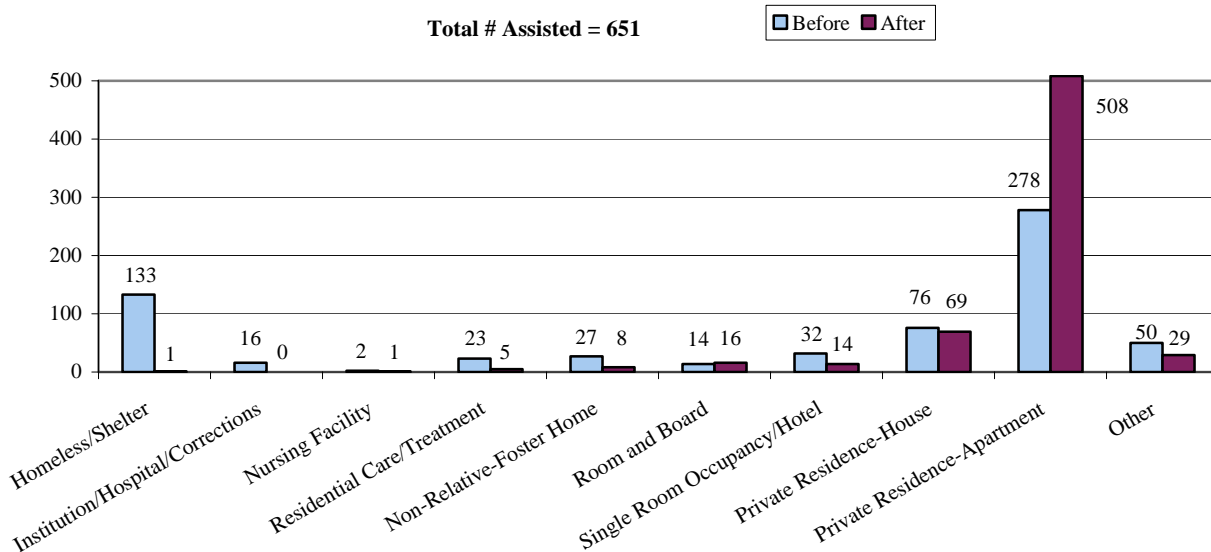


Figure 4 shows Real Choice Housing Fund recipients' type of housing arrangement before and after receiving assistance. While this chart does not fully capture the individual moves experienced by recipients, it illustrates that, by and far, individuals were assisted in moving from more structured settings or homelessness to more integrated community housing.

Attachment C is a chart summarizing movement patterns. It lists housing types in order from least integrated to most integrated and "other". It shows that,

- Over one-third (36%) of recipients moved to more integrated settings.
- An additional 63% were assisted in retaining their same housing or same category of housing. This 63% includes any one who maintained the same housing type before and after assistance and individuals in a "private residence" or "other" category who moved to a "private residence" category after receiving assistance.
- The remaining individuals (only 1%) had unique circumstances that fell in the "other" category or were assisted in obtaining a less integrated housing setting in an attempt to prevent re-institutionalization.

When the Real Choice Housing Assistance Fund was established, it was not anticipated that the number of homeless persons assisted would comprise such a large total of recipients (20%). Many of these individuals were living in homeless shelters at the time of referral. The majority of homeless individuals assisted (84%) were able to move into a private home or apartment (either alone or with others) as a result of the Real Choice funds.

Prior to receiving assistance, fifty individuals were identified as living in housing that did not fit the provided housing categories and was designated "other". Because this was a sizable number, housing in the "other" category was analyzed. When "other" was selected on the data worksheet, the CMHP was asked to describe the housing. However, only one-third provided a description. Based on these descriptions, several were living in some sort of transitional or supportive housing that did not fit the given categories; others were living in a trailer or temporarily with a relative.

**Figure 5: Number of RC Housing Fund Recipients Still in Housing at Follow-up**

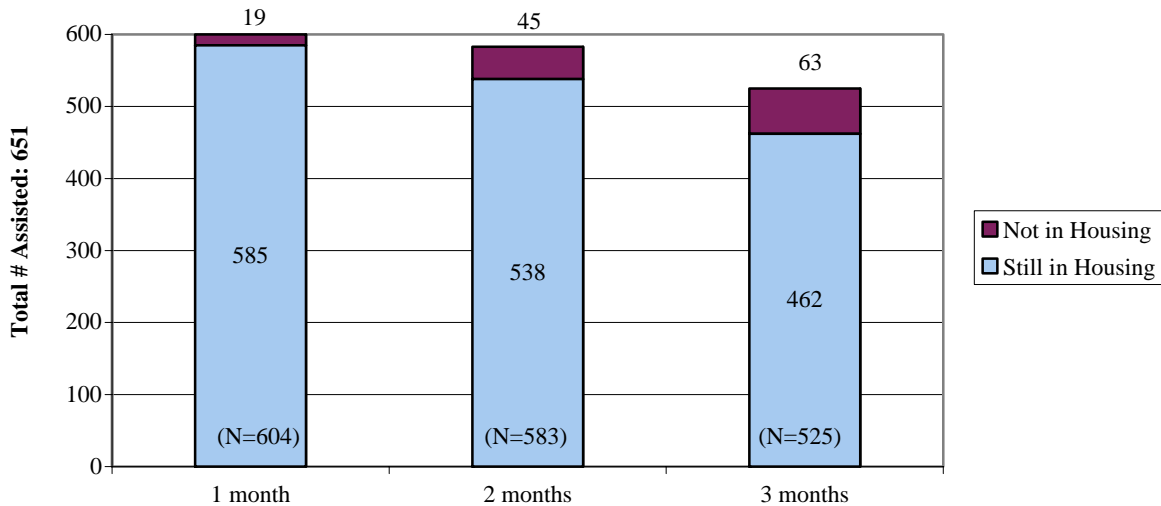


Figure 5 illustrates the number of individuals still in their more integrated housing at one-month, two-month and three-month follow-up contacts. The vast majority of assisted individuals retained their housing. At one month following assistance, 97% of the 604 persons contacted were still in their housing. After two months, 92% of the 583 recipients contacted were still in their housing. After three months, 88% of the recipients contacted were still in their housing. While some recipients did not make it in their more integrated housing, service providers reported that the opportunity to experience a more independent setting was often an important experience for the individual and may lead to a future, more permanent move.

## SUMMARY AND CONCLUSIONS

The Real Choice Housing Fund was successful in providing financial assistance to remove barriers and enable people with severe and persistent mental illness to obtain or retain more integrated community housing. A total of 651 consumers received an average of \$409. This small amount of assistance enabled 36% to move to more integrated community housing and 63% to retain their existing type of community housing.

Three months after receiving assistance, 88% of contacted recipients, a total of 462 individuals, were still in their community housing. For some of those who did not

continue in the more integrated community housing, the experience was still helpful and may lead to a future, more permanent move.

OMHAS is currently exploring ways to offer a "Real Choice Housing Fund" on a more permanent basis. The availability of financial assistance for individuals able to move into more permanent and integrated community housing would help consumers progress in their recovery and independence. This would in turn, open up capacity in more structured residential settings for people on waiting lists.

Office of Mental Health and Addiction Services  
Real Choice Housing Assistance Fund

**APPLICATION MATERIALS FOR  
REAL CHOICE HOUSING ASSISTANCE AWARDS**

Real Choice Housing Assistance funds are available to Community Mental Health Programs (CMHPs) for the purpose of assisting **adults with severe and persistent mental illness** to obtain or retain integrated community living situations of their own choice. These grant funds are being made available in recognition that initial move-in, or other incidental costs can be an obstacle in acquiring and maintaining desired community living situations.

It is the intent of OMHAS that the funds be made available to consumers no later than **May 1, 2003** and an amount equal to the total dollar award be fully disbursed by **December 31, 2004**.

Background. The Real Choice Housing Assistance Fund was initiated in 2002 as a result of the Oregon Department of Human Services receiving a Real Choice Systems Change Grant from the federal Department of Health and Human Services, Center for Medicaid and Medicare Services. The grant provides \$260,000 in federal funds, for direct small loans or grants to enable consumers to live independently in housing situations of their own choice. OMHAS is soliciting applications from CMHPs to administer these funds on a regional basis throughout the state.

Goal. To increase consumers' access to affordable community housing of their own choice through direct loans or grants.

Application Criteria. To be eligible for funding, applicants must meet the following criteria:

1. Eligible Applicants. Applications will be accepted from (a) an Oregon County which is an approved CMHP, (b) a group of Oregon Counties, all of which are approved CMHPs, or (c) a federally recognized tribe, or group of tribes in Oregon which are approved as CMHPs. No proposal will be accepted except from a county or tribe or group of counties or tribes. Entities other than counties or tribes that wish to develop projects must do so in collaboration with counties or tribes.

2. Applicant Capacity. CMHPs proposing to administer Real Choice Housing Assistance Funds must demonstrate the background and experience necessary to allocate the funds in a fair, equitable and financially responsible manner.
3. Geographic Distribution. Applicants must ensure that funds awarded to their geographic region will be accessible to individuals throughout the region and be willing to work with partners to ensure access to consumers throughout their geographic areas of operation.
4. Need. Documentation must describe how these funds will address housing access barriers for persons with severe and persistent mental illness in the local geographic area.
5. Leverage. Preference is given to applications that demonstrate matching cash source(s) or in kind contribution(s) that will work with Real Choice funds to assist consumers with obtaining integrated community housing.
6. Fund Administration. Applicants must agree to distribute funds in accordance with permitted uses and limitations and articulate procedures incorporating forms and guidelines established by the Office of Mental Health and Addiction Services.

A. Uses. The funds must be used for direct, non-recurring costs associated with housing. Some examples of allowable uses are:

- |                                     |                              |
|-------------------------------------|------------------------------|
| ◆ Deposits for cleaning or security | ◆ application fees.          |
| ◆ first/last month's rent           | ◆ basic furnishings          |
| ◆ rent payment assistance           | ◆ utility service connection |
|                                     | ◆ ADA modifications          |

B. Limitations. The funds may not be used for building of new housing units or capital improvements with the exception of ADA alterations.

C. Administration Costs. The Administering CMHP will receive an amount not to exceed 4% of the regional award to offset administrative costs.



**D. Implementation Timeline.** The Administering CMHP must implement the program no later than May of 2003. The Real Choice funds must be fully disbursed by December of 2004. In the case of ongoing programs an amount equal to the initial award must have been disbursed prior to December of 2004.

7. **Subcontractor Relationships.** The selected CMHP may pass some or all of the funds to another governmental, or not-for-profit entity, with which it has an existing contractual relationship. Prior to doing so, the CMHP must:

- ◆ Gain approval of the proposed subcontractor from OMHAS prior to funding.
- ◆ Ensure that the designated subcontractor complies with all grant requirements.
- ◆ Ensure that all funds, with the exception of the 4% administration allowance are spent for the direct benefit of individual consumers as articulated in the grant.

Please note that the sub-contracting agency must meet all of the criteria and conditions as outlined in this application, as deemed appropriate by the Administrator of the Office of Mental Health and Addiction Services.

8. **Consumer Involvement.** Applicants must provide evidence of consumer involvement in activities relating to Real Choice Housing Assistance funds.

9. **Service Availability.** The availability of services that support consumer self-determination in choice of housing for Real Choice Housing Fund recipients must be demonstrated.

10. **Data and Reporting.** Applicants must agree to complete tracking forms and expenditure reports in the format prescribed by OMHAS. See Attachment C for draft report format.)

11. Eligible Recipients of Housing Assistance. To be eligible for Real Choice Housing Assistance Funds, a recipient must have a psychiatric disability defined as:

- a. currently receiving Social Security Disability income (SSDI) or Supplemental Security Income (SSI) because of a mental health disability; and/or
- b. be a person eligible for housing assistance on the basis of income, and have a diagnosis of a severe and persistent mental illness such as bipolar disorder, major depression, schizophrenia; and/or
- c. be a person with a history of severe and persistent mental illness who is at risk of losing her or his community housing due to an inability to pay a one-time, housing related expense or payment.

The administering agency must use a screening form provided by OMHAS to make determinations of eligibility.

Award Limits. Due to the limited amount of funding available, requests are limited to the sum of the total funds per county as outlined in Attachment B. Upon review of all applications, requests may be adjusted in order to ensure a reasonably fair geographic distribution. In the event that funds for some geographic areas remain unapplied for, these remaining funds will be distributed to other applicants. Requests may also be adjusted to aid communities or individuals where residential service availability is reduced as a result of state budget reductions.

Review Criteria. A rating sheet that will be used to rate your application according to the criteria listed above is included as Attachment D.

In applying for a Real Choice Housing Fund award:

- \* Be sure to use the application provided as Attachment A;
- \* Make your application as brief and concise as possible;
- \* Do not put the application in a binder or report folder;

- \* Include a letter of support from each local Community Mental Health Program Director in the region you plan to serve;
- \* Include all required attachments; and

Submit your application no later than **March 7, 2003** to

Real Choice Housing Fund Coordinator  
Office of Mental Health and Addiction Services  
2575 Bittern St. NE  
PO Box 14250  
Salem, Oregon 97309-0740

**No applications will be accepted via the FAX machine, e-mail, or other Internet means.**

This application will be posted on the web site for the Office of Mental Health and Addiction Services at <http://omhs.mhd.hr.state.or.us>  
If you have questions or need additional information, please contact Steve Borcharding at (503) 945-9263 (email: [steve.borcharding@state.or.us](mailto:steve.borcharding@state.or.us)) or Vicki Skryha at (503) 945-9722 (email: [vicki.skryha@state.or.us](mailto:vicki.skryha@state.or.us)).

Attachment A: Real Choice Housing Fund Application Materials

Attachment A

Real Choice Housing Assistance Fund

APPLICATION FORM

\*\*\*\*\*

Name of Applicant: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_ Zip \_\_\_\_\_

Contact Person: \_\_\_\_\_ Phone No: \_\_\_\_\_

Email \_\_\_\_\_

Geographic Area (counties): \_\_\_\_\_

Real Choice Housing Fund Amount Requested: \$ \_\_\_\_\_

*(Note: Be sure this amount was computed using instructions on Attachment B.)*

\*\*\*\*\*

Summary of Request (Briefly describe the amount requested, geographic area, anticipated number of recipients and anticipated outcomes):

## Attachment A: Real Choice Housing Fund Application Materials

### Attachment A (continued)

Attach narrative and other materials in response to the following items. Limit your responses to a total of **no more than 10 pages**. Label responses to correspond with the numbered items below.

1. Applicant Capacity. Describe your background and experience relating to administration of programs of a similar type or scope. Briefly outline how you will administer funds to ensure a fair and financially responsible distribution.
2. Geographic Distribution. Describe how you will ensure equitable access to funds for consumers in all regions of your geographic area of operations. Describe how you will work cooperatively with other CMHPs, if applicable, and partners to accomplish this goal. How will you market availability of these funds?
3. Documentation of Need. Identify obstacles to housing for consumers in your community and describe how the Real Choice Housing Fund will be used to increase consumer's access to housing of their choice. Provide an outline of proposed award guidelines for consumers such as income requirements or other qualifications you would implement in compliance with the grant requirements.
4. Leverage. Describe any matching or leveraged cash sources or in-kind donations that will increase the impact of the funds. Describe other programs of similar nature you operate, if any, and how they will complement Real Choice Housing Funds to increase housing opportunities.
5. Fund Administration. Indicate agreement to administer the funds in accordance with permitted uses and limitations as prescribed by OMHAS. (See number 6 of the application materials for Real Choice Housing Assistance Awards.)
6. Consumer Involvement. Describe how consumers are currently involved within your agency beyond service participation. Provide a detailed plan describing how you propose to include consumers in the process of program design, implementation, and oversight.

Attachment A (continued)

7. Service Availability. Describe what services will be provided to consumers receiving Real Choice Housing Funds and how they will ensure long term housing stability.
8. Data and Reporting. Indicate your willingness to complete tracking forms and expenditure reports in a timely manner according to the format prescribed by OMHAS. (See Attachment B, draft report)
9. Written Statement. Provide a written statement indicating that you understand that the Real Choice Housing Fund funding award is subject to the Implementation of the project by May 1, 2003. If the project has not implemented by June 30, 2003 your award may be revoked. Further, the Real Choice Housing Funds must be fully disbursed by the administering agency no later than **December 31, of 2004**.

# Attachment A: Real Choice Housing Fund Application Materials

## Attachment B

County	Real Choice Housing Assistance
Baker	\$2,035
Benton	\$4,403
Clackamas	\$12,670
Clatsop	\$4,356
Columbia	\$2,705
Coos	\$6,283
Crook	\$1,927
Curry	\$1,837
Deschutes	\$10,030
Douglas	\$7,817
Gilliam/Hood River, Sherman, Wasco	\$3,617 (Mid-Columbia)
Grant	\$648
Harney	\$856
Jackson	\$10,557
Jefferson	\$1,383
Josephine	\$10,216
Klamath	\$6,478
Lake	\$354
Lane	\$27,618
Lincoln	\$4,957
Linn	\$8,198
Malheur	\$2,528
Marion	\$22,912
Morrow/Wheeler	\$614
Multnomah	\$70,028
Polk	\$3,077
Tillamook	\$2,308
Umatilla	\$3,137
Union	\$2,545
Wallowa	\$687
Warm Springs	\$432
Washington	\$17,039
Yamhill	\$5,747

Real Choice Housing Assistance Funds will be made available to applicants according to the matrix above. In applying for funds, total the sum for each county in your proposed service region and add four percent. This will be the maximum you can request.





Attachment A: Real Choice Housing Fund Application Materials

Attachment D

Real Choice Housing Assistance Fund  
Proposal Rating Criteria

Criteria	Rating Scale	Score
1. Eligible Applicant? CMHP (county, group of counties, tribe)	Yes          No	N/A
2. Applicant Capacity	Low – Medium – High (0 – 10 points)	
3. Geographic Distribution – accessibility throughout region.	Low – Medium – High (0 – 10 points)	
4. Need – description of how funds address housing barriers	Low – Medium – High (0 – 10 points)	
5. Leverage – degree to which other funds are leveraged	Low – Medium – High (0 – 10 points)	
6. Fund Administration – will use funds within guidelines provided	Low – Medium – High (0 – 20 points)	
7. Subcontractor Relationships – if subcontractor to be used, complies with pass-through requirements?	Yes          No	N/A
8. Consumer Involvement	Low – Medium – High (0 – 20 points)	
9. Service Availability – support for consumer self-determination	Low – Medium – High (0 – 20 points)	
10. Data and Reporting – Agree to requirements	Yes          No	N/A
11. Recipient Eligibility – Demonstrates understanding of criteria	Yes          No	N/A

Threshold Criteria: Applicant must receive “Yes” rating to 1, 7, 10 and 11.

Score: Total points (maximum of 100 points). Applicants must score at least 65 points in order to be approved for funding.

## Attachment B: Real Choice Housing Fund Implementation Guidelines

Date: July 22, 2003  
To: Real Choice Housing Assistance Funds Recipients  
From: Bob Dieter, Real Choice Homeless Services Coordinator  
Re: Guidelines for Implementation of Real Choice Housing Assistance Funds

The Office of Mental Health and Addiction Services is currently in the process of contracting the Real Choice Housing Assistance Funds. Because these funds are made available through a grant from the Federal Center for Medicare and Medicaid Services, it is important to carefully track use of the funds and report the outcomes achieved. The following materials were developed to provide instruction and consistency in the implementation of the Real Choice Housing Assistance. The enclosed packet contains four documents:

1. The Real Choice Housing Assistance Fund Guidelines gives an overview of eligibility, uses, record keeping, and reporting requirements related to use of the funds.
2. The Consumer Request for Real Choice Housing Assistance Funds is required for the application process. It requests specific information from the applicant, determines eligibility, amount requested, how the fund will be used.
3. Instructions and codes for Real Choice Housing Funds Consumer Data Worksheet provide instructions and coding for completion of all the data fields in the worksheet.
4. Real Choice Housing Assistance Funds Data Worksheet has numerous data fields and is required to be submitted to the OMHAS RC Housing Coordinator on a quarterly basis as indicated in the Guidelines.

These materials are included for your review and use. They are also available in electronic version if you need additional copies, or would like to submit the Consumer Data Worksheet via e-mail.

If you have questions or need additional information, please do not hesitate to contact Bob Dieter, RC Homeless Services Coordinator, at 503.945.9733 ([Robert.Dieter@state.or.us](mailto:Robert.Dieter@state.or.us)) or Vicki Skryha, OMHAS Housing Development Coordinator, at 503.945.9722 ([Vicki.Skryha@state.or.us](mailto:Vicki.Skryha@state.or.us)).

We look forward to your successful implementation of the Real Choice Housing Assistance Funds Program.

Attachments

## **REAL CHOICE HOUSING ASSISTANCE FUNDS**

### **GUIDELINES**

The Real Choice Housing Assistance Funds provide financial assistance to help persons with severe and persistent mental illness obtain or retain more integrated housing through individual grants or loans that address financial barriers. These Federal Funds enable these individuals to:

- Live in the most integrated community settings appropriate to their individual requirements and preferences;
- Exercise meaningful choices about their living environments; and
- Obtain quality services in a manner as consistent as possible with their community living preferences and priorities

### **Eligibility**

To be eligible for Real Choice Housing Assistance Funds, a recipient must have a psychiatric disability defined as:

1. Currently receiving Supplemental Security Income (SSI) or Social Security Disability Income (SSDI) because of a mental health disability; and /or
2. Be a person eligible for housing assistance on the basis of income, and have a diagnosis of a severe and persistent mental illness such as bipolar disorder, major depression, schizophrenia; and/or
3. Be a person with a history of severe and persistent mental illness who is at risk of losing her or his community housing due to an inability to pay a one-time, housing related expense or payment.

### **Uses**

The Real Choice Housing Assistance Funds are intended to cover expenses such as the following:

- Application Fees
- First/last month's rent
- Cleaning/security deposit
- Utility hookup
- Rent payment assistance
- Basic furnishings
- ADA alterations

The Funds are *not* to be used for emergency shelter, motel vouchers or other homeless shelter assistance.

**Record-keeping and reporting**

An application form that includes all of the information on the attached example (Consumer Request for Real Choice Housing Assistance Funds) must be completed by all consumer applicants. The example form may be used or can be adapted. Completed application forms must be retained on file for a period of 7 years. Information from these forms will be used to complete the Consumer Data Worksheets.

**Reporting Requirements**

A copy of the Consumer Data Worksheet must be submitted to OMHAS on a quarterly basis according to the following schedule:

<b>For the period:</b>	<b>Report due by:</b>
July 1, 2003 to September 30, 2003	October 31, 2003
October 1, 2003 thru December 31, 2003	February 2, 2004
January 1, 2004 thru March 31, 2004	April 30, 2004
April 1, 2004 thru June 30, 2004	August 2, 2004
July 1, 2004 thru September 30, 2004	November 1, 2004
October 1, 2004 thru December 31, 2004	January 31, 2005

**For More Information**

If you have questions or need more information, please contact Bob Dieter at 503.945.9733 or [Robert.dieter@state.or.us](mailto:Robert.dieter@state.or.us) or Vicki Skryha at 503.945.9722 or [Vicki.skryha@state.or.us](mailto:Vicki.skryha@state.or.us).

Submit these reports to :  
RC Housing Coordinator  
OMHAS  
PO Box 14250  
Salem, Oregon 97309-0740

**Consumer Request for  
Real Choice Housing Assistance Funds**

**Name of consumer:** \_\_\_\_\_ **Age:** \_\_\_\_\_ **Sex:**  M  F

**Ethnicity:**  American Indian or Alaska Native  Hispanic or Latino  
 Asian or Pacific Islander  White  
 Black or African-American  Multi-racial/Other

**Eligibility category:** (check all that apply)

- Currently receiving Supplemental Security Income (SSI) or Social Security Disability Income (SSDI) because of a mental health disability; and /or
- Be a person eligible for housing assistance on the basis of income, and have a diagnosis of a severe and persistent mental illness such as bipolar disorder, major depression, schizophrenia; and/or
- Be a person with a history of severe and persistent mental illness who is at risk of losing her or his community housing due to an inability to pay a one-time, housing related expense or payment.

**Amount requested:** \$ \_\_\_\_\_ (Circle one: Grant or Loan)

**How will the request be consistent with Real Choice goals:**

- Will help to **obtain** more integrated housing
- Will help to **retain** more integrated housing
- Will help in **transition from homelessness** to permanent housing

**Describe specific request:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**What will the Real Choice Housing Funds be used for: (check all that apply)**

- Application fees  Rent payment assistance
- First/last month's rent  Basic furnishing
- Cleaning/security deposit  ADA alterations
- Utility hookup  Other (specify: \_\_\_\_\_)

**Consumer Applicant Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Staff Completing Form:** \_\_\_\_\_ **Date:** \_\_\_\_\_

Attachment B: Real Choice Housing Fund Implementation Guidelines

**Consumer/applicant currently lives: (check one in each box)**

Homeless or Shelter  
 Institution /Hospital/Corrections  
 Nursing Facility  
 Residential Care/Treatment  
 Non Relative –Foster Home  
 Room and Board  
 Private Residence - House  
 Private Residence - Apartment  
 Single Room Occupancy/ Hotel  
 Other: describe: \_\_\_\_\_

Alone  
 Spouse/Significant Other  
 Parent/Family/Other Relative(s)  
 Friends/Unrelated Persons  
 Other: describe: \_\_\_\_\_

**As a result of Real Choice Housing Assistance Funds, consumer/applicant will live: (check one in each box)**

Nursing Facility  
 Residential Care/Treatment  
 Non Relative –Foster Home  
 Room and Board  
 Private Residence - House  
 Private Residence - Apartment  
 Single Room Occupancy/ Hotel  
 Other: describe: \_\_\_\_\_

Alone  
 Spouse/Significant Other  
 Parent/Family/Other Relative(s)  
 Friends/Unrelated Persons  
 Other: describe: \_\_\_\_\_

**Decision-making Process:**

Decision Date: \_\_\_\_\_  Approved: Grant or Loan  Not Approved (explain)

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Follow-up:**

**One month:** Date of contact/confirmation: \_\_\_\_\_ by (name): \_\_\_\_\_

Is the consumer still in housing?  Yes  No (explain): \_\_\_\_\_

Comments: \_\_\_\_\_  
\_\_\_\_\_

**Two month:** Date of contact/confirmation: \_\_\_\_\_ by (name): \_\_\_\_\_

Is the consumer still in housing?  Yes  No (explain): \_\_\_\_\_

Comments: \_\_\_\_\_  
\_\_\_\_\_

**Three month:** Date of contact/confirmation: \_\_\_\_\_ by (name): \_\_\_\_\_

Is the consumer still in housing?  Yes  No (explain): \_\_\_\_\_

Comments: \_\_\_\_\_  
\_\_\_\_\_

**NOTE:** This information will be used to complete the Consumer Data Worksheet, submitted to OMHAS on a quarterly basis.

# Attachment B: Real Choice Housing Fund Implementation Guidelines

## Instructions and Codes for RC Housing Funds Consumer Data Worksheet

Use the following instructions and codes to fill out the worksheet.

1. **Provider:**  
Name of the CMHP or agency.
2. **From \_\_\_\_\_ To \_\_\_\_\_**  
Start with initial date and continue until the sheet is completed. Copy and use additional sheets as needed.
3. **Consumer Identifier**  
Please provide the consumer's identifier. To ensure confidentiality and HIPAA compliance, use an identifier (e.g. a number or letter code) that would not reveal the consumer's identity. Maintain a key (listing names and corresponding identifiers) separate from applications and worksheet.
4. **Age**  
Please indicate the consumer's age.
5. **Sex**  
Please indicate the consumer's gender. Enter appropriate letter for gender. Use (F) for Female and (M) for Male.
6. **Ethnicity/Race**  
Enter appropriate letter.
 

American Indian or Alaska Native	<b>A</b>
Asian or Pacific Islander	<b>B</b>
Black or African-American	<b>C</b>
Hispanic or Latino	<b>D</b>
White	<b>E</b>
Multi-racial/ Other	<b>F</b>
7. **Date**  
Please enter the date the request was approved.
8. **Amount**  
Please enter the amount of Real Choice Housing Funds provided.
9. **Grant/Loan**  
Please indicate if the funds were used as a grant (G) or a loan (L).

**10a. From: Type of Housing (Hsg.)**

Please indicate what the last housing arrangement was with the following codes:

Hsg. type	code
Homeless or Shelter	<b>A</b>
Institution / Hospital / Corrections	<b>B</b>
Nursing Facility	<b>C</b>
Residential Care /Treatment	<b>D</b>
Non-Relative- Foster Home	<b>E</b>
Room and Board	<b>F</b>
Private Residence-House	<b>G</b>
Private Residence- Apartment	<b>H</b>
Single Room Occupancy/Hotel	<b>I</b>
Other: describe:	<b>J</b>

## Attachment B: Real Choice Housing Fund Implementation Guidelines

**10b.** Please indicate whether individuals live by themselves (alone) or with others by using these codes:

Hsg. Sub category	code
Alone	0
Spouse/Significant Other	1
Parent/Family/Other Relative(s)	2
Friends/Unrelated Persons	3
Other	4

**11a. To: Type of Housing (Hsg.)**

Please indicate what housing the consumer obtained. (Ex.: SRO; Studio, Apartment)

Hsg. Type	code
Homeless or Shelter	A
Institution / Hospital / Corrections	B
Nursing Facility	C
Residential Care /Treatment	D
Non-Relative- Foster Home	E
Room and Board	F
Private Residence-House	G
Private Residence- Apartment	H
Single Room Occupancy/Hotel	I
Other: describe:	J

**11b.** Please indicate whether individuals live by themselves (alone) or with others by using these codes:

Hsg. Sub category	code
Alone	0
Spouse/Significant Other	1
Parent/Family/Other Relative(s)	2
Friends/Unrelated Persons	3
Other	4

**12. Fund Use**

Please indicate the type with the following codes:

Type of Fund Usage	code
Application fees	AF
First/last month's rent	FLR
Cleaning/security deposit	CSD
Utility hookup	UTL
Rent payment assistance	RPA
Basic furnishing	FRN
ADA alterations	ADA
Other (specify)	OTH

If you indicated "other", please specify use in comments column.

**13. Follow-up**

Please indicate if the consumer is still in housing (Yes/No) during each of the next 3 months.

**14. Comments**

Please make any comments here.



# Attachment B: Real Choice Housing Fund Implementation Guidelines

## REAL CHOICE HOUSING ASSISTANCE FUNDS

CONSUMER DATA WORKSHEET Submit to OMHAS on quarterly basis

2. From \_\_\_\_\_ To: \_\_\_\_\_  
(Date) (Date)

1. Provider: \_\_\_\_\_

3.	4.	5.	6.	7.	8.	9.	10a.	10b.	11a.	11b.	12.	13.			14.
												Consumer Group	Family Type	Comments	
1															
2															
3															
4															
5															
6															
7															
8															
9															
10															
11															
12															
13															
14															
15															
16															
17															
18															

Page \_\_\_\_\_ of \_\_\_\_\_

\* Duplicate this page as necessary for additional clients served.

Attachment C: Real Choice Housing Movement Chart: Housing Before and After Assistance

		TO										
FROM	Type of Housing	Homeless or Shelter	Institution / Hospital / Corrections	Nursing Facility	Residential Care /Treatment	Non-Relative-Foster Home	Room and Board	Single Room Occupancy/Hotel	Private Residence-Apartment	Private Residence-House	Other:	TOTAL
	Homeless or Shelter	1				2	6	6	107	5	6	133
	Institution / Hospital / Corrections				2	1	1		11	1		16
	Nursing Facility								2			2
	Residential Care /Treatment				1				21	1		23
	Non-Relative-Foster Home			1		3	2		17	2	2	27
	Room and Board						6		8		1	15
	Single Room Occupancy /Hotel				2			6	21	2		31
	Private Residence-Apartment							1	270	4	3	278
	Private Residence-House					1			22	52	1	76
Other:					1	1	1	30	1	16	50	
<b>TOTAL</b>	<b>1</b>	<b>0</b>	<b>1</b>	<b>5</b>	<b>8</b>	<b>16</b>	<b>14</b>	<b>509</b>	<b>68</b>	<b>29</b>	<b>651</b>	

Key: **Bold outlining** indicates same housing retained; no fill indicates more integrated; shading indicates less integrated