



Housing Plan

Name: _____ Date: _____

Name of Person Completing Plan: _____

Role: _____

Summary of Long-Term Housing Goal

Write a summary in the box below of what an ideal home will look like and include (including who to live with, type of housing, unit size, location, tenure, accessibility features, and other important considerations).

Finding a New Home

This document is a template to assist individuals to create a plan to find a home to rent or buy. Section A includes steps to complete if your goal is to rent or buy a home. Section B will help you finish a plan if your goal is to rent a home. Section C will help you finish a plan if your goal is to own a home.

Section A. Action Steps to Rent or Buy a Home

Some of the same details you will need to complete are the same for both renting and buying a home. Section A will cover these action steps. Using the information collected in the Summary of Housing Needs and Preferences in the *Housing Assessment*, record the personal information for the housing seeker in Phase 1. Then,

carefully work through Phases 2, 3 and 4 to document the short-term, next, and pre-move-in action steps that you will need to do to assist an individual to find and rent or buy a home. Be sure to include the party responsible, target date and completion date for each action step.

Phase 1: Summarize Personal Information:

Using the information in the Summary of Housing Needs and Preferences, summarize the personal information in the chart below to identify what actions are needed to prepare the individual to successfully find and rent an affordable, accessible home.

Documentation	<input type="checkbox"/> All Documentation Available <input type="checkbox"/> Missing Documentation <input type="checkbox"/> What Documentation is missing?
Debt	<input type="checkbox"/> No Outstanding Debts <input type="checkbox"/> Debts to be Settled
Credit History	<input type="checkbox"/> No Credit <input type="checkbox"/> Poor Credit <input type="checkbox"/> Good Credit <input type="checkbox"/> Unknown Credit
Rental History	<input type="checkbox"/> No Past Rental Issues <input type="checkbox"/> Past Rental Issues:
Criminal History	<input type="checkbox"/> No Criminal History Criminal History:
Benefits	<input type="checkbox"/> Needs to Apply For:
Affordability	<input type="checkbox"/> Can Afford Market Rate <input type="checkbox"/> Needs Financial Assistance/Subsidy
Preliminary Eligibility for Housing Assistance	Income is ____% of Annual Median Income (AMI)* <input type="checkbox"/> May be eligible for Housing Choice Voucher (HCV) <input type="checkbox"/> May be eligible for Public Housing <input type="checkbox"/> May be eligible for Low Income Housing Tax Credit <input type="checkbox"/> Specialty population(s) for voucher: *To locate the AMI by county, use the following website: https://www.huduser.gov/portal/datasets/il/il2022/select_Geography.odn

Accessibility	<input type="checkbox"/> No Need <input type="checkbox"/> Needs Formal Assessment <input type="checkbox"/> Needs Accessibility Features: <input type="checkbox"/> Accessibility Features Needed:
Transportation	<input type="checkbox"/> Transportation Available <input type="checkbox"/> Needs Transportation Assistance
Subsidized Housing Waiting Lists	On wait list for: <input type="checkbox"/> Housing Choice Voucher (HCV) <input type="checkbox"/> None <input type="checkbox"/> Other Subsidized Housing <input type="checkbox"/> Public Housing ➤ Which Properties?
Supports	<input type="checkbox"/> Natural Support: <input type="checkbox"/> No Natural Supports Name: Role/Relationship: Contact Information:
Waiver Status	<input type="checkbox"/> Has Waiver <input type="checkbox"/> Ineligible Which Waiver(s)? <input type="checkbox"/> Waiting List
Other:	
Other:	

Phase 2: Determine Short-Term Actions

Using the above personal information, review the list below and place a check mark in front of the short-term actions that are needed to prepare the individual to successfully rent a home. Then for each action checked, designate the specific actions to be taken, the responsible party and the target date for completion. When each action is completed, note the date completed. *Note: Additional resources on the short-term actions are covered in the Housing Options Training (HOT) Module 2 and in the Housing Toolkit User Guide Appendix

Step	Actions	Responsible Party	Target Date	Date Completed
<input type="checkbox"/> Arrange for PREP Training				
<input type="checkbox"/> Compile Missing Documents				
<input type="checkbox"/> Settle Past Debts				
<input type="checkbox"/> Repair Credit				
<input type="checkbox"/> Prepare explanations for rental, credit, and/or criminal history				
<input type="checkbox"/> Arrange for formal evaluation of accessibility needs				
<input type="checkbox"/> Arrange for transportation assistance				
<input type="checkbox"/> Determine eligibility for housing assistance.				
<input type="checkbox"/> Follow up on waiting lists				
<input type="checkbox"/> Apply for housing				
<input type="checkbox"/> Identify personal supports				
<input type="checkbox"/> Follow up on waiver				
<input type="checkbox"/> Assist in finding a housemate				
<input type="checkbox"/> Apply for benefits				
<input type="checkbox"/> Other:				
<input type="checkbox"/> Other:				

Phase 3: Next Step Actions

Based on the information collected in Phase 2, now move to Phase 3 Describe action steps to be taken, including the responsible party and the timeline. Examples may include some of the following: continue following-up on pending housing applications; submit additional housing applications; assist in negotiating lease terms; rental unit inspection; arrange meetings with potential housemates; arrange for interim supports until waiver comes through.

[illegible]

Phase 4: Pre-Move-In Actions

Place a check mark in front of the pre-move-in actions that are needed to prepare the individual to successfully move to his or her new home. Then for each step checked, designate the actions to be taken, the responsible party and the target date for completion. When each action is completed, note the date completed.

Step	Actions	Responsible Party	Target Date	Date Completed
<input type="checkbox"/> Home Modification				
<input type="checkbox"/> Agreement with Roommate				
<input type="checkbox"/> Roommate Orientation				
<input type="checkbox"/> Utility Hook-Ups				
<input type="checkbox"/> Telephone Service				
<input type="checkbox"/> Furniture Moving				
<input type="checkbox"/> Household Setup (Kitchen, cleaning supplies, etc.)				
<input type="checkbox"/> Emergency Contact List				
<input type="checkbox"/> Crisis Plan				
<input type="checkbox"/> Case Management Service or Support Coordination				
<input type="checkbox"/> Housing Support (assistance with ongoing needs)				
<input type="checkbox"/> Certified Peer Specialist				
<input type="checkbox"/> Behavioral Health Supports				
<input type="checkbox"/> Other				
<input type="checkbox"/> Other				

Section B: Action Steps to Rent a Home

The Action Steps in Section B are specified to finishing your plan to rent a home.

Step	Actions	Responsible Party	Target Date	Date Completed
<input type="checkbox"/> Final Walk Through				
<input type="checkbox"/> Signing of Lease				
<input type="checkbox"/> Documentation and Pictures from Walk Through				
<input type="checkbox"/> Orientation to the apartment and building/amenities				
<input type="checkbox"/> Other:				
<input type="checkbox"/> Other:				

Section C: Action Steps to Buy a Home

Purchasing a home is a complex transaction that requires a significant level of expertise and resources. If the individual has stated a preference to buy a home, the following steps should be followed:

➤ Step 1: Identify and Understand Your Financial Resources

To help determine whether the housing seeker understands and is prepared to undertake the responsibilities of homeownership, including the financial responsibilities, check-yes or no for each item below based on the income information provided previously. *Note: Additional information on the action steps to buy a home are covered in the Housing Options Training (HOT) Module 2 and in the Housing Toolkit User Guide Appendix.

Financial Resource:	Yes	No
Down Payment and Closing Costs	<input type="checkbox"/>	<input type="checkbox"/>
Stable Monthly Income for Principal, Interest, Taxes, and Insurance (PITI)	<input type="checkbox"/>	<input type="checkbox"/>
Income for Home Repairs and On-Going Maintenance	<input type="checkbox"/>	<input type="checkbox"/>
Funds or Plans for Major Repairs	<input type="checkbox"/>	<input type="checkbox"/>

Ability to Maintain the Home (by self, family, or purchase of services)	<input type="checkbox"/>	<input type="checkbox"/>
Interior Maintenance (Heating, Ventilation, Air Conditioning, Housekeeping, Plumbing, etc.)	<input type="checkbox"/>	<input type="checkbox"/>
Exterior Maintenance (Siding or Paint, Lawn, Snow Removal, etc.)	<input type="checkbox"/>	<input type="checkbox"/>

➤ Step 2: Homebuyers Counseling

If, based on the information above, the individual is ready to proceed to buy a home, refer him or her to the local PHFA approved homeownership counseling agency. PHFA provides federal and state funds to housing counseling agencies throughout the Commonwealth. These agencies provide homebuyer counseling and education, including pre-purchase counseling, and counseling for mortgage delinquency and to prevent mortgage foreclosure. A list of PHFA approved Homeownership Counseling Agencies by county can be found on PHFA's website <http://phfa.org/counseling/homebuyers.aspx>. A housing counselor will assist the individual through the home buying process, including applying for a mortgage and locating a home.

If the individual is not yet ready to buy a home, they should still be referred to their local PHFA approved homeownership counseling agency, where a counselor will assist the individual to prepare for homeownership, including determining affordability, repairing credit, etc. In the meantime, these individuals could be assisted in developing a Housing Plan to secure and rent a home while they are preparing for homeownership.

Finally Home is a demonstration project of Values into Action funded by the Pennsylvania Developmental Disabilities Council (PADDDC) to assist individuals with disabilities from rural communities in meeting their goals to access and maintain control of their own homes. Diana T. Myers and Associates, Inc. (DMA) and Values Into Action created the **Finally Home Housing Toolkit** as a user-friendly resource providing housing information and tools for advocates, Housing Service Providers, Supports Coordinators, Supports Brokers, family members and other interested parties to support people with disabilities in securing the housing of their choice.

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