



# Flexible Funding:

A Resource to Help Individuals in the  
Settlement Agreement Population  
Transition to and Maintain  
Independent Housing



# Agenda

- Who is Eligible?
- Permitted/Prohibited Unit Types and Settings
- Eligible Uses/Funding Amounts
- Requesting Flexible Funding
- Criteria for Approving/Denying Requests
- Payment Methods
- How the DBHDS Housing Team Can Support You



# Who Is Eligible

- Applicants must meet ALL criteria:
  - Be age 18 or older, or be a legally emancipated minor
  - Have a developmental disability as defined in the Code of Virginia
  - Be in one of the following categories:
    - transitioning from a skilled nursing facility, an intermediate care facility, a state training center, a group home or other congregate setting AND meet the level of functioning criteria for a Developmental Disabilities waiver
    - Receiving Building Independence (BI), Family and Individual Support (FIS) or Community Living (CL) Waiver services
    - Determined eligible for & currently on waitlist for the BI, FIS or CL Waiver



# Who Is Eligible...Cont'd

- Meet the criteria for an eligible family:
  - individual's household **CANNOT** include his/her
    - parents,
    - guardians, or
    - grandparents(e.g., individuals with developmental disabilities must be heads of their own households, separate from family of origin)
  - individual's household **CAN** include the individual's own child or children.



# Permitted Unit Types/Settings

- Legal dwelling units with a full kitchen & bathroom
- Units owned, but not occupied by, parents, grandparents, siblings, children and grandchildren of the eligible family
- Shared housing
- Other units, if they:
  - Constitute a legal use & occupancy
  - Require assisted person (or his/her guardian) to be leaseholder
  - Do not permit assisted person's parents/grandparents/guardian to reside with them
  - Promote integration of people with disabilities



# Prohibited Unit Types/Settings

- Nursing homes, board and care homes, or facilities providing continual psychiatric, medical, or nursing services
- College or other school dormitories
- Units on the grounds of penal, reformatory, medical, mental, and similar public or private institutions
- Units in boarding houses (e.g. facility that provides meals & lodging on a daily or weekly basis for fee)
- Units not approved by local building or zoning ordinance to be rented as part of another dwelling or property (e.g., an “accessory dwelling unit”, “in-law suite” or “carriage house”)
- a residential setting licensed by the Department of Behavioral Health and Developmental Services or the Virginia Department of Social Services
- a non-residential setting (e.g., homeless shelter, extended stay hotel, vacation timeshare)



# Eligible Uses/Maximum Funding Amounts

- Flexible Funds may be used for:
  - Assistance to make the initial transition to housing
    - One time funding allotment of \$5,000 for initial transition
    - If funds remain after initial transition, they may not be carried over for subsequent moves or for assistance to maintain housing
  - Assistance to maintain housing
    - One time funding allotment of \$5,000 for housing maintenance
    - Funds can be drawn upon as long as individual remains in independent housing (regardless of how many moves the individual makes)
    - Once the \$5,000 allotment is depleted, it is gone
- Support Coordinators may not seek, accept or retain Flexible Funding assistance from CSB for amounts paid by tenant or by third party such as an insurance provider or another program that provides financial assistance.



# Eligible Uses for the Initial Transition to Housing

- Temporary Rental Assistance (not to exceed two month's rent, specifically to allow completion of environmental modifications)
- Housing Transition Services & Supports
  - First month's rent
  - Security deposit
  - Utility connection fees and deposits
  - Moving expenses
  - Direct support with housing location and pre-tenancy activities
  - Household supplies
- Non-reimbursable environmental modifications
- Non-reimbursable assistive technology
- Temporary support staffing
- Miscellaneous
  - Covers non-traditional costs that are temporary, related to lapses in coordination of benefits and other related occurrences
  - DBHDS must provide prior written authorization to use this category





# Eligible Uses to Obtain Housing

- What are “direct support activities?”
  - Conducting tenant screenings & housing assessments to identify housing barriers and needs
  - Developing an individual housing support plan
  - Assisting with the housing application process
  - Assisting with the housing search process
  - Assisting with securing a roommate or a live-in aide
  - Identifying resources to cover one-time move-in expenses
  - Ensuring the living environment is safe and ready for move-in
  - Assisting with arranging for & supporting details of the move
  - Developing a housing support crisis plan with prevention & early intervention components
- Flexible Funds can pay a Shared Living Provider or other qualified organization for up to two months of activities at \$326.50/mo
  - Includes private case managers, Service Facilitators, Centers for Independent Living
  - Excludes family members, roommates, friends

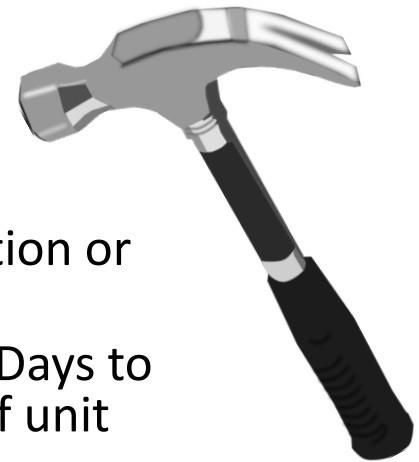


# Eligible Uses to Obtain Housing

- What are “temporary staffing” activities?
  - Short term, temporary assistance to help an individual get acclimated to new housing, e.g.:
    - teach how to use thermostat/dishwasher/washer/dryer
    - show where laundry and mailrooms are
  - Housing location services
  - Help budgeting, packing, shopping for furniture
- Individuals requesting temporary staffing should have a plan that identifies types of required supports, natural and paid
- Flexible Funding does not pay for temporary staffing reimbursable via Medicaid or Medicaid Waiver (typically, individuals will be on the Waiver Waitlist)
- Housing Locators must provide resume/statement of qualifications (support coordinator submits with payment request)
- Family members, roommates, friends may not provide temporary staffing

# Eligible Uses to Maintain Housing

- Emergency Rent Payment & Associated Late Fees
  - Covers tenant portion of rent and related late fees
  - Limit: 3 months of rent and 3 late fees per lease year
- Last Resort Utility Assistance
  - Covers gas, electric, oil, propane, water and sewer bills that are in arrears
  - Limit: \$500 per lease year
- Household Management Activities
  - Covers specialized cleaning, chore services, pest extermination and trash removal
  - Limit: \$500 per lease year
- Unit Repairs
  - Covers damage (including water damage) to eligible individual's rental housing unit cause by individual's action or inaction
  - Individual must have a Notice of 21 Days to Cure or 30 Days to Vacate for a lease violation related to tenant damage of unit
  - Damage must not be covered by owner's or renter's insurance



# Eligible Uses to Maintain Housing

- Temporary Relocation
  - Covers temporary relocation expenses if rental housing is damaged, flooded, contaminated by a biohazard or condemned
  - Limit: one request per lease year, not to exceed \$2,500
- Miscellaneous Tenant Support
  - Must provide detailed description of how funds will be used
  - Covers temporary non-traditional tenancy support costs related to lapses in coordination of benefits and service that place individual at risk of eviction
  - Must receive prior written authorization from DBHDS to use this funding category

# NEW! Employment & Community Transportation

- Flexible Funding now helps individuals who need transportation to achieve an outcome in their Individual Support Plan but who have no other means of transportation
- Flexible Funding will cover the cost of:
  - Transportation in a private vehicle by a person such as a co-worker or community member
  - The purchase of fares for public transportation
- On-demand transportation is not included (e.g., taxis, Uber/Lyft, private companies)
- An administering agency (Employment & Community Transportation or “ECT” provider) must coordinate transportation access. The agency must be a
  - Provider with any DBHDS license to serve people with DD or
  - Center for Independent Living



# How ECT Works: the Process

- Individual finds a driver (or public transportation)
- Support coordinator links individual to ECT Provider
- ECT Provider & individual complete a Trips Plan
- Support Coordinator gets Trips Plan authorized by DBHDS
- Support Coordinator submits Trips Plan with Flexible Funding Application
- CSB Flexible Funding Program approves the application and pays the ECT provider for the Trips Plan
- ECT provider either:
  - Pays driver to drive the individual OR
  - Pays for the public transportation fare & gives the individual the fare cards, tokens, passes, etc.



# Making a Request for Flexible Funding

- Request Flexible Funding through your Support Coordinator
- The Support Coordinator will assist with completing and submitting the Flexible Funding application
- Provide your Support Coordinator the required documentation:
  - A copy of your new lease or welcome letter that shows your new address and what the security deposit will be
  - Provide receipts or copies of paid bills & canceled checks for reimbursement of utility hook-ups, furniture, household supplies, etc.
  - If you are asking the CSB to pay bills or purchase items, provide bills, quotes or invoices (a CSB may only be able to pay vendors with whom it has a contractual relationship)
- The CSB must approve the Flexible Funding application before it can pay or reimburse any expense.



# Additional Documentation for Requests to Maintain Housing

- Applications for support to maintain housing **MUST** include a Housing Stability Plan
- CSB Flexible Funding program staff evaluate Housing Stability Plan as part of the application. They look at whether the plan is:
  - Realistic
  - Achievable
  - Affordable on the individual's budget
- If the plan does not meet these criteria, the support coordinator and individual must revise and resubmit the Housing Stability Plan before the application can be approved





# Criteria for Approving Flexible Funding Requests



- CSB Flexible Funding Program Administrators are responsible for approving and denying requests.
- The Administrator must see the verifiable need for a good or service to approve assistance for an individual to obtain or maintain housing.
- The Administrator will approve requests that have one or more of these justifications:
  - The individual cannot move into housing or maintain occupancy without the good or service
  - The good or service is essential for the person's health and safety in the home
  - The household item or service is essential for the person to comply with the lease
  - The good or service is essential to the person's ability to function in and/or use the housing

# Criteria for Denying Flexible Funding Requests

**DENIED**

- The Administrator will deny requests that
  - Have no verifiable need for a good or service to help an individual obtain or maintain housing
  - Do not demonstrate attempts to secure requested items through other available resources
  - Do not meet one of the approval justifications
  - Meet a specific denial criteria:
    - The item is primarily for the purpose of entertainment or recreation
    - The request is for multiple sets of a specific item
    - The good or service can be fully funded by another funding source
    - The good or service is primarily for the benefit of a housing or service provider, not the individual
    - The item is a luxury item that costs more than the basic, standard alternative and is not essential to obtaining or maintaining independent housing

# Payment Methods

- CSB Flexible Funding Fiscal Agents can pay for expenses related to obtaining and maintaining housing by:
  - Reimbursing the individual (or his/her family) for eligible, out-of-pocket expenses
    - Must be accompanied by itemized receipts
    - Receipts must be submitted within 60 days
    - Furniture & household supplies have maximum allowable limits. CSBs will not reimburse above the allowable limit.
  - Purchasing items on behalf of individuals
  - Paying vendors directly
- Flexible Funding does not advance funds directly to individuals or families



# Q&A

CAN FLEXIBLE FUNDS PAY FOR...	
Furniture for a live-in aide?	YES
Furniture for other household members (e.g., crib, playpen, kids bed)?	NO
Filling a propane tank, oil tank, etc.?	NO
Replacing furniture that is old?	NO
Pay rent or utilities that is in arrears?	YES
Replacing a roof or installing a septic tank?	NO
Pay for security deposits, utility connections, moving expenses, environmental mods, needed when moving from apartment #1 to apartment #2?	NO
A washer and dryer if the landlord does not provide these but offers hookups?	NO
A small household toolkit to put furniture together?	YES
Expenses incurred before the Flexible Funding program existed?	NO!

# How the DBHDS Housing Team Can Support You

1. Call your Regional Housing Specialist to talk through unusual requests
  - The Specialist can discuss whether there are other issues going on that may require other considerations (e.g., reasonable accommodations)
  - The Specialist can also point you toward other potential funding sources you can leverage
2. If you have a question about Flexible Funding policy, submit questions to Jeannie Cummins at [j.cummins@dbhds.virginia.gov](mailto:j.cummins@dbhds.virginia.gov)



