



Housing Security Community-Based Health Initiative

Year 1 Annual Report

Prepared for Newton-Wellesley Hospital by
The University of Massachusetts Donahue Institute

March 2023

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Established in 1971, the UMass Donahue Institute is a public service and engagement arm of the University of Massachusetts. Our mission is to advance equity and social justice, foster healthy communities, and support inclusive economies that alleviate poverty and promote opportunity. In collaboration with partner organizations and clients, we carry out our mission through research, education and training, capacity building, and direct services to strengthen our collective impact.

The Institute's Applied Research and Program Evaluation group partners with organizations across multiple sectors to design and implement utilization-focused studies that address the social determinants of health. We believe that research is most meaningful when findings can be applied to public benefit. We also believe that evaluative work is a key driver in advancing equity and strive to utilize culturally responsive and inclusive evaluation practices in all our work.

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Housing Security Community-Based Health Initiative

In October 2021, Newton-Wellesley Hospital (NWH) awarded a four-year, \$1.9 million grant to WATCH Community Development Corporation (WATCH CDC) and their collaborative partner Metro West Collaborative Development (Metro West CD) to implement upstream and downstream approaches to address housing insecurity. In collaboration with an Advisory Committee comprised of representatives from the community and community-based organizations, NWH identified housing insecurity as the health priority to be addressed through its Determination of Need (DoN) Community-Based Health Initiative (CHI). An Allocation Committee reviewed competitive proposals and selected WATCH CDC and Metro West CD to implement interventions at the individual and systems levels to reduce housing insecurity and inequities impacting low-income tenants, particularly among communities of color and immigrant communities. The grant, which will conclude in September 2025, will serve NWH's six priority communities—Natick, Needham, Newton, Waltham, Wellesley, and Weston.

WATCH CDC and Metro West CD are using a multi-faceted approach to best support their clients and reduce housing inequities in the communities they serve, prioritizing the following key CHI strategies:

| Housing Security | Mental Health | Economic Independence | Community Engagement |
|---|--|---|--|
|  |  |  |  |
| Address immediate housing insecurity with housing-focused case management, basic needs support and referrals, and emergency financial assistance. | Increase awareness of mental health impacts associated with housing insecurity. Reduce the impact of housing insecurity on clients' mental health. | Increase clients' economic independence using an employment and financial management self-sufficiency coaching model. | Support client and community engagement to advocate for protection of low-income tenants facing evictions. |

Program Evaluation

The UMass Donahue Institute (UMDI) provides evaluation support and progress monitoring for this initiative. In addition to participating in program meetings, UMDI provides collaborative partners with templates to submit data and progress reports documenting program activities and outcomes. WATCH CDC and Metro West CD submit client-level data and narrative progress reports on an annual basis.

This first annual report summarizes program information collected from October 2021 through November 2022. Client data, however, reflects a shorter 10-month time period (February - November 2022) corresponding to the timeline when the organizations' client case management data platform was developed and fully operational. Subsequent annual reports will correspond to twelve months of data, capturing information from December through November of the following calendar year.

CHI Partners & Program Development Activities



WATCH CDC is a private, nonprofit community development corporation working toward a more just community in the Waltham area by providing tenant advocacy and support services, promoting affordable housing, providing adult education and leadership development, and empowering underrepresented residents through civic engagement.

WATCH CDC serves as the lead agency for the Housing Security CHI and is responsible for overall grant management, program coordination with their partner, Metro West CD, and contracting and collaboration for mental health services and client data systems development and management. WATCH CDC is also responsible for providing housing-focused case management services and emergency financial assistance to low-income residents of Waltham as well as leading new interventions to better support their clients' mental health needs, economic independence, and community engagement.



Metro West CD is a private, nonprofit community development corporation, with a mission to organize residents, resources and good ideas to resolve community problems and improve the quality of life for all members of Metro West neighborhoods.

As a key partner on the Housing Security CHI, Metro West CD is responsible for providing housing-focused case management services and emergency financial assistance to residents in the remaining five priority communities: Natick, Needham, Newton, Wellesley, and Weston. They work in concert with WATCH CDC to implement CHI interventions to better support their clients' mental health needs, economic independence, and community engagement.

Year One Program Development Activities

During the first year of the grant, WATCH CDC and Metro West CD implemented the following activities to strengthen their **organizational capacity** to better address housing insecurity and inequities affecting their community residents, including:

- **Increased Staffing, Prioritizing the Hiring of Bilingual and Bicultural Staff:** Through the Housing Security CHI, WATCH CDC and Metro West CD were able to fund new and existing staff positions to support this work. More specifically, WATCH CDC used grant dollars to fund three full-time bilingual, bicultural staff positions, including the Job and Financial Management Clinic Coordinator, an additional full-time Housing Clinic Case Manager, and a Community Organizer, in addition to supporting existing staff. Metro West CD partially funded two Case Managers, as well as the Director of Housing Programs.

Both organizations reported challenges in the recruitment and hiring of qualified bilingual candidates. To address this challenge, WATCH CDC intentionally prioritized recruiting and hiring staff members who are bilingual and bicultural with some related skills/experience and providing them with on-the-job training and leadership development opportunities. Metro West CD also actively recruited and made offers to bilingual candidates for Housing Case Manager positions but were unable to successfully hire for this position. Metro West CD, instead, promoted and trained internal staff for this position. They will continue to recruit for bilingual candidates moving forward.

CHI Program Development Activities

- **Strengthened Staff Capacity to Better Recognize and Support Clients' Mental Health Needs:** With the CHI's prioritization of mental health, WATCH CDC used grant funding to contract the consulting services of a Children's Charter bilingual licensed mental health counselor (LMHC), to work closely with both organizations. More detailed information about mental health support services provided during the first year of the grant can be found on page 21.
- **Strengthened Outreach and Access to Information to Communities in Need:** Individuals facing housing insecurity learn about the WATCH CDC and Metro West CD services through multiple channels, including referrals from municipal programs, referrals from local human service organizations and nonprofits, community events, word of mouth, and directly via organizations' websites. WATCH CDC also mailed and posted a Community Needs Survey to all WATCH CDC members and clients in Spanish and English, gathering up-to-date information on critical needs.

With the continued reliance on virtual services (fully virtual for WATCH CDC and limited in-person services for Metro West CD) following the COVID-19 pandemic, both organizations have made a concerted effort to improve the usability of their websites, so that residents, particularly those from immigrant communities, have increased access to information about services and resources available and improved access to initiate client services online in a timely manner. Specific improvements during the first year of the grant include:

- ❖ WATCH CDC increased and improved the translation quality of information and resources provided on WATCH CDC's website; translating information presented into the languages of French, Haitian Creole, Portuguese, and Spanish.
- ❖ Both WATCH CDC and Metro West CD developed and posted information about services available and a new consolidated Intake Form on their websites as an easy means to access services. The intake form is available in both English and Spanish.

The sustained closure of WATCH CDC's office / in-person Housing Clinic is a challenge for client engagement, necessitating increased virtual connections. WATCH CDC reported utilizing a wide variety of technologies—such as Vonage phone/texting, Google messaging, Facebook messaging—and frequent emails and phone calls to stay in touch with their clients.

CHI Program Development Activities

- **Implemented New Housing Clinic Client Case Management Platform:** In order to cohesively gather, organize, coordinate, and report on clients being served through the grant, WATCH CDC and Metro West CD contracted with Salesforce to develop and implement a uniform tailored data collection system capturing information on client characteristics, areas of need identified, and direct services and referrals provided. Case managers were able to use the Salesforce case management system in their daily work as of February 2022. The new system enables the organizations to track the number of households helped and the types of services provided as well as identify areas that may need improvement.

The new Salesforce case management system captures a great deal of information, but as with any new system, requires a substantial investment of time and training before it is used effectively and comprehensively. Analysis of the Salesforce data from the first year of the grant revealed that while client characteristics and client support needs were well-documented, information on the services provided by case managers was less comprehensively captured, particularly by Metro West CD. Follow-up conversations were held with both WATCH CDC and Metro West CD staff to better understand why a portion of their clients did not have service actions documented.

- ❖ The vast majority of WATCH CDC's clients requesting housing or non-housing assistance had at least one related service action documented in Salesforce. WATCH CDC leadership explained that every one of their clients received at least one contact with a case manager after completing their intake form. Those without a documented service action generally reflect clients (1) whose reported needs changed or differed following conversations with case manager, (2) whose needs were not aligned with WATCH CDC services and were immediately referred to other organizations, and (3) who were "unreachable" after numerous attempts to contact them following initial conversation.
- ❖ A substantial proportion of Metro West CD's clients requesting housing or non-housing assistance did not have a related service action documented in Salesforce. Metro West CD leadership explained that the discrepancies in the data primarily reflected challenges with documentation while developing, implementing, and learning a new case management data system. They noted that the initial design for entering service actions was not in a user-friendly format or directly compatible to their services, and, as a result, did not fully reflect the level of services provided. Metro West CD's leadership expressed confidence that future data and reporting will be more reflective of the level of services provided.

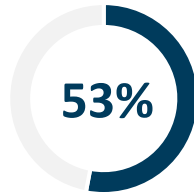
The two organizations have continued to collaborate and work with their Salesforce consultant to address these challenges, including: refining and modifying the placement and format of information to be entered to improve usability experience for case managers; offering continued Salesforce training opportunities to staff; and reiterating buy-in from both organizations to use Salesforce and document service actions steps taken for all clients.

CHI Reach and Priority Population

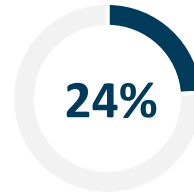
Through the Housing Security CHI, WATCH CDC and Metro West CD **strengthened and expanded existing housing-focused case management services, reaching nearly 700 low-income households in the communities surrounding NWH during the first year of the grant.** WATCH CDC and Metro West CD together successfully reached and served the CHI's intended target populations, with the majority of clients representing households of color and immigrant communities.



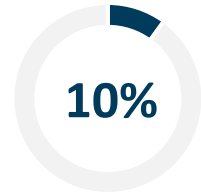
692 households representing at least **1,766** individuals were served. Client household sizes ranged from **1 to 12** people.



53%
of households
contained children
younger than 18
years old

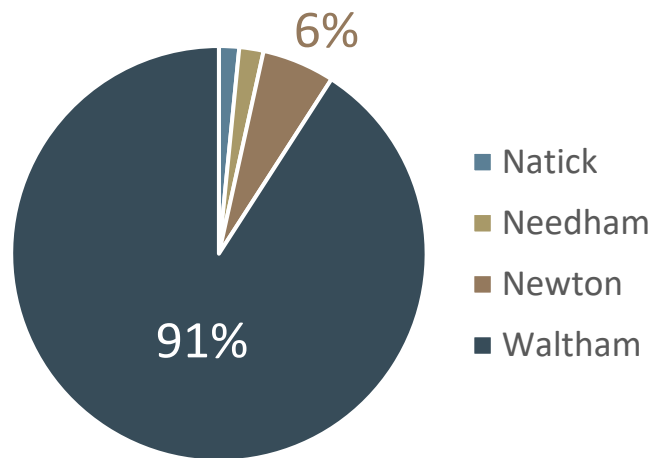


24%
of households
contained children
younger than 5
years old



10%
of households
contained
members with
special needs

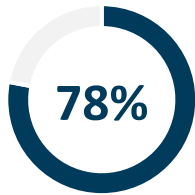
The vast majority of clients served during the first year of this grant were Waltham residents, receiving services from WATCH CDC.



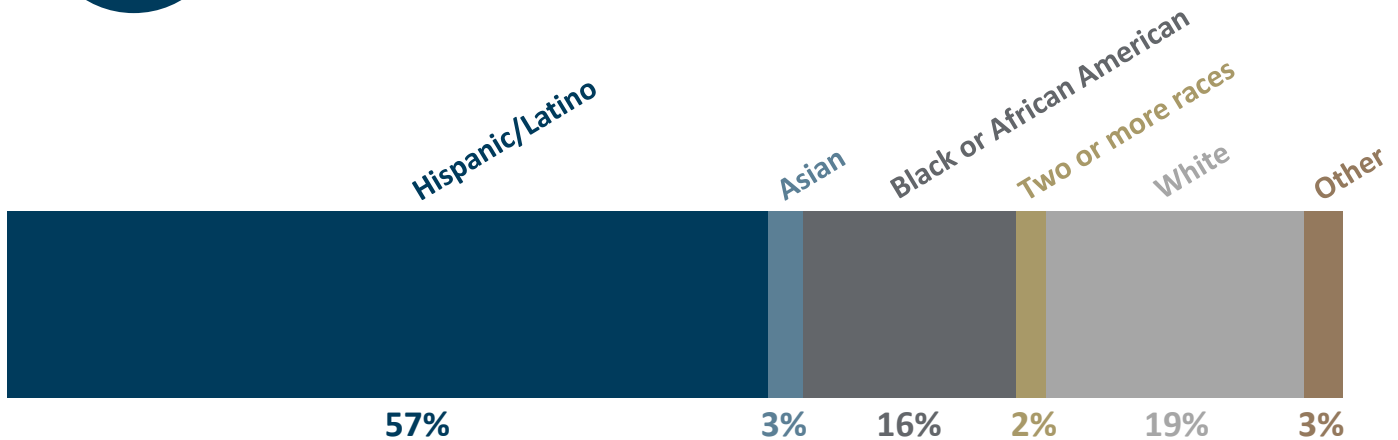
Nearly half (48%) of clients served were new to either organization.



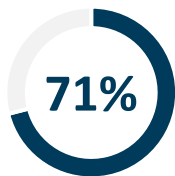
CHI Reach and Priority Population



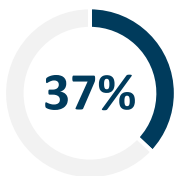
of clients who provided race/ethnicity data identified as people of color; the majority of whom identified as Latinx



WATCH CDC and Metro West CD are reaching diverse populations, increasing access to culturally and linguistically appropriate supports and resources to help reduce housing insecurity and inequities during the first year of the grant.

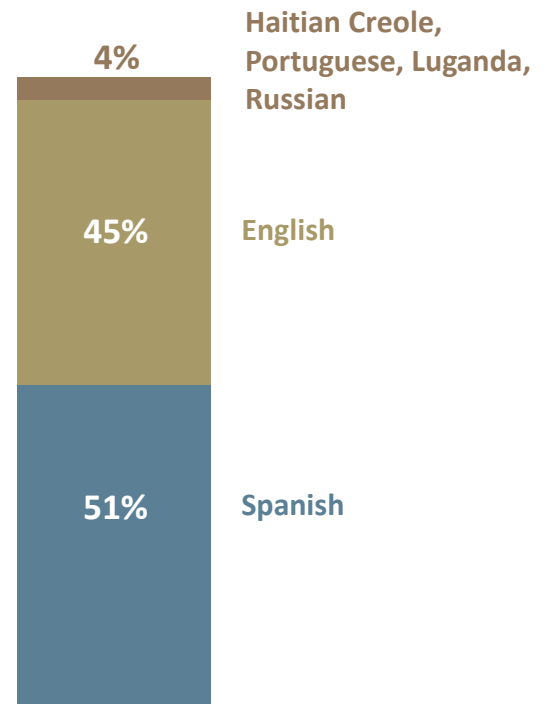


of clients who provided their country of origin were foreign-born, reflective of the area's diverse immigrant communities.



of clients identified Guatemala as their country of origin

Clients identified 41 other countries of origin, representing Central America; South America; North America; the Caribbean; East, Central Southern, North, and West Africa; Central, Eastern, Northern, Southern, Southeastern, and Western Asia; and Eastern and Western Europe.



At least 18% of clients requested translation services

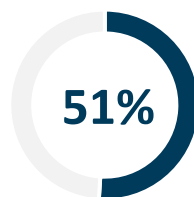
CHI Reach and Priority Population

WATCH CDC

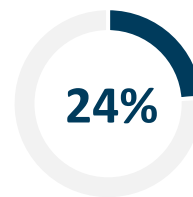
During the first year of the grant, WATCH CDC provided services to more than 600 low-income households, representing more than 1,500 individuals. WATCH CDC staff provided clients with a broad range of emergency housing financial assistance and housing-focused case management supports to stabilize tenancies and connect these families with community resources to address their basic needs. All clients are current Waltham residents or had prior connections to Waltham at the time they initially sought services. Nearly one-half of households received services from WATCH CDC for the first time.



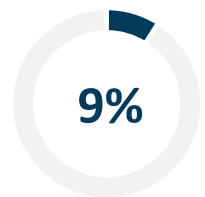
624 households representing at least **1,570** individuals were served. Client household sizes ranged from **1 to 12** people.



of households contained children younger than 18 years old



of households contained children younger than 5 years old



of households contained members with special needs



of clients served were **Waltham residents or had prior connections to Waltham.**



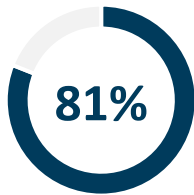
283 clients served were new to WATCH CDC.



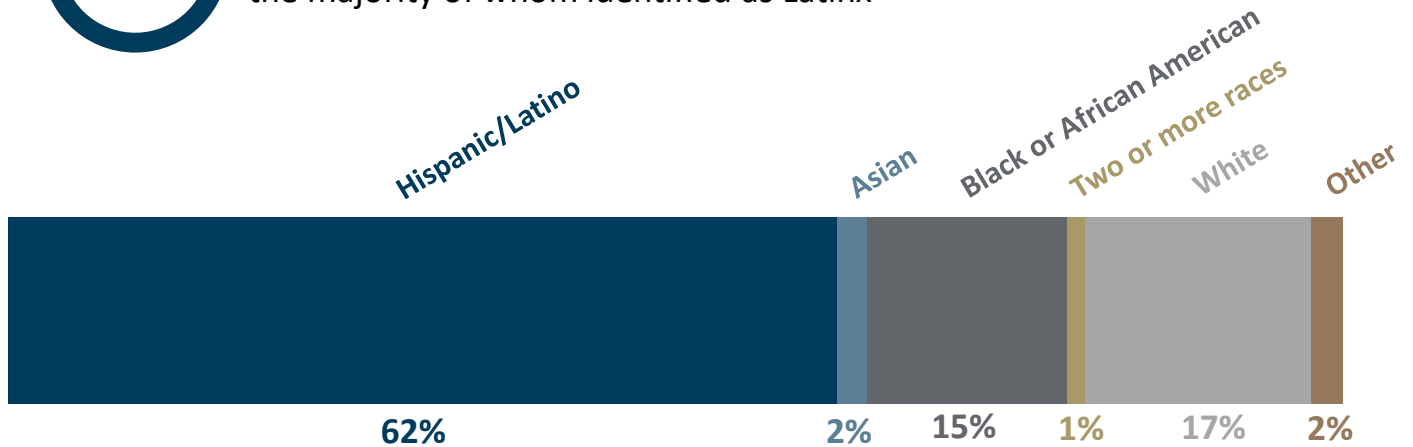
Average household income for clients requesting emergency financial assistance was **\$18,378.**

CHI Reach and Priority Population

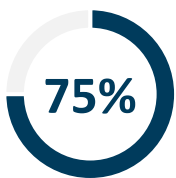
WATCH CDC successfully reached the Housing Security CHI target population, with the vast majority of clients served representing communities of color and immigrant communities. According to data collected for NWH's 2022 CHNA, Waltham's ethnic/racial composition was approximately one-third people of color, more than one-quarter foreign-born, and one-third non-English speaking in 2020.



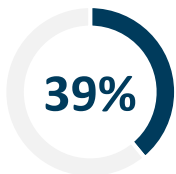
of clients who provided race/ethnicity data identified as people of color; the majority of whom identified as Latinx



WATCH CDC is reaching diverse populations, increasing access to culturally and linguistically appropriate supports and resources to help reduce housing insecurity and inequities during the first year of the grant.

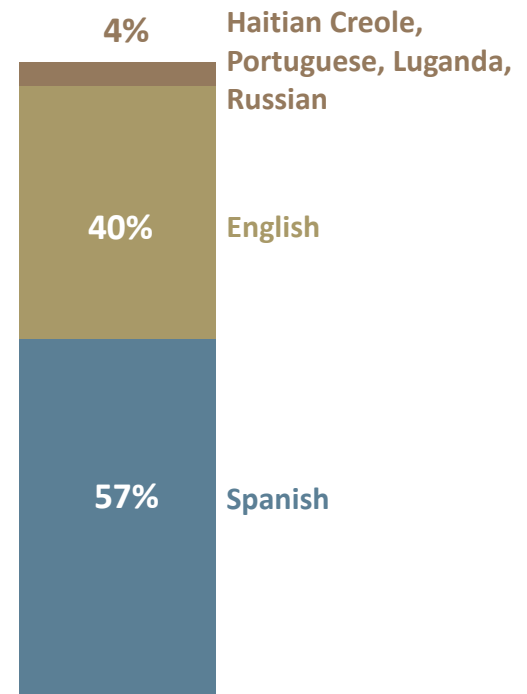


of clients who provided their country of origin were foreign-born, reflective of the Waltham's diverse immigrant communities.



of clients identified Guatemala as their country of origin

Clients identified 36 other countries of origin, representing Central America; South America; North America; ; the Caribbean; East, -Central, Southern, North and West Africa; Central, Eastern, Northern, Southern, Southeast and Western Asia; and Eastern and Western Europe.



At least 19% of clients requested translation services

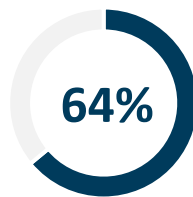
CHI Reach and Priority Population

Metro West CD

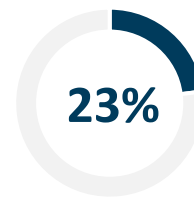
During the first year of the grant, Metro West CD provided services to 68 low-income households, representing nearly 200 individuals spanning across the lifespan. Metro West CD provided clients with emergency housing financial assistance and housing-focused case management supports to search for more affordable housing and connect with community resources as needed. More than half of clients were Newton residents with the remainder residing in Needham, Natick, and Waltham. The vast majority (80%) received services from Metro West CD for the first time.



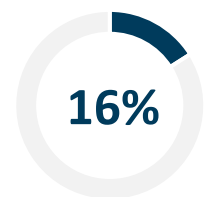
68 households representing at least **196** individuals were served. Client household sizes ranged from **1 to 7** people.



of households contained children younger than 18 years old

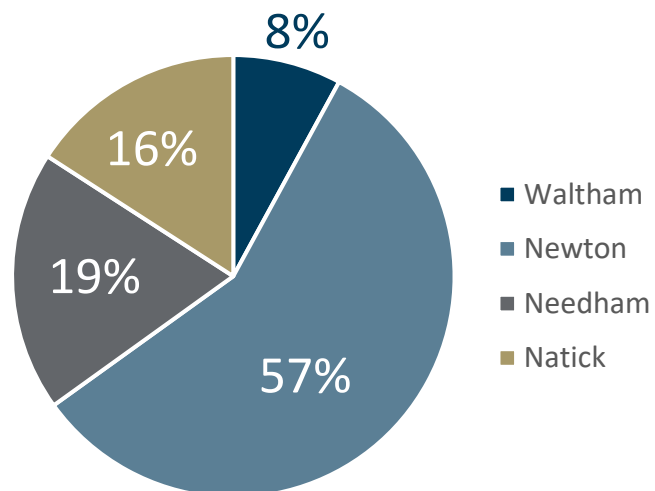


of households contained children younger than 5 years old



of households contained members with special needs

The majority of clients served by Metro West CD during the first year of this grant were Newton residents.



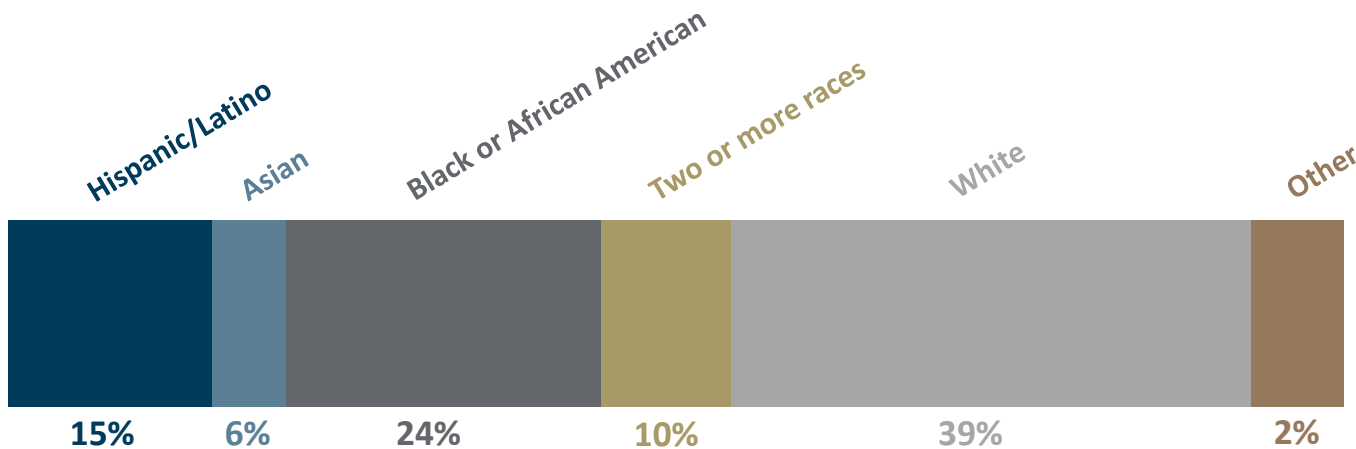
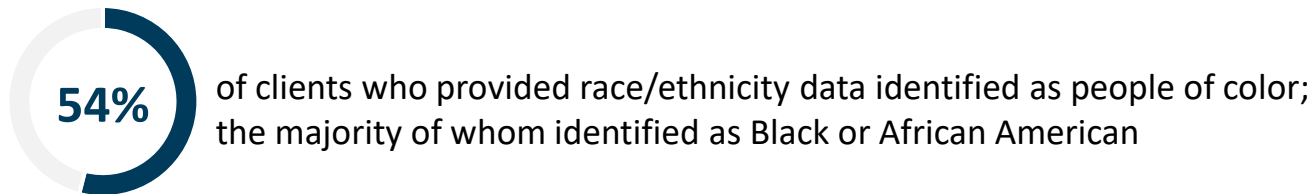
55 clients served were new to Metro West CD.



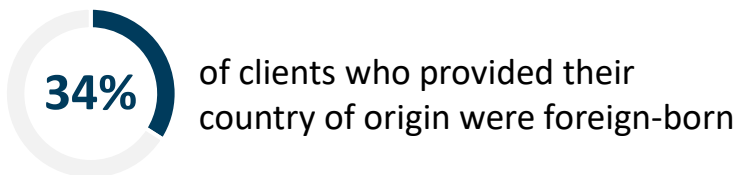
Average household income for clients requesting emergency financial assistance was **\$30,476**.

CHI Reach and Priority Population

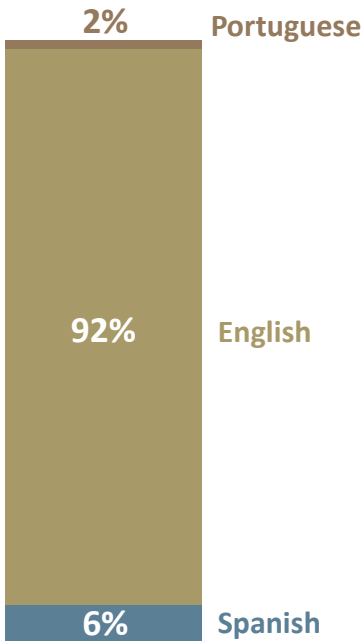
Metro West CD successfully reached the Housing Security CHI target population, with more than half of clients representing communities of color and approximately one-third representing immigrant communities. According to data collected for NWH's 2022 CHNA, Newton's ethnic/racial composition (which has the greatest diversity of the five priority communities) was more than one-quarter people of color, one-fifth foreign-born, and one-quarter non-English speaking in 2020.



Metro West CD is reaching diverse populations, increasing access to culturally and linguistically appropriate supports and resources to help reduce housing insecurity and inequities during the first year of the grant.



Clients identified 10 countries of origin representing South America; Central and Western Africa; Central, Eastern and Northern Asia; and Southeast Europe.



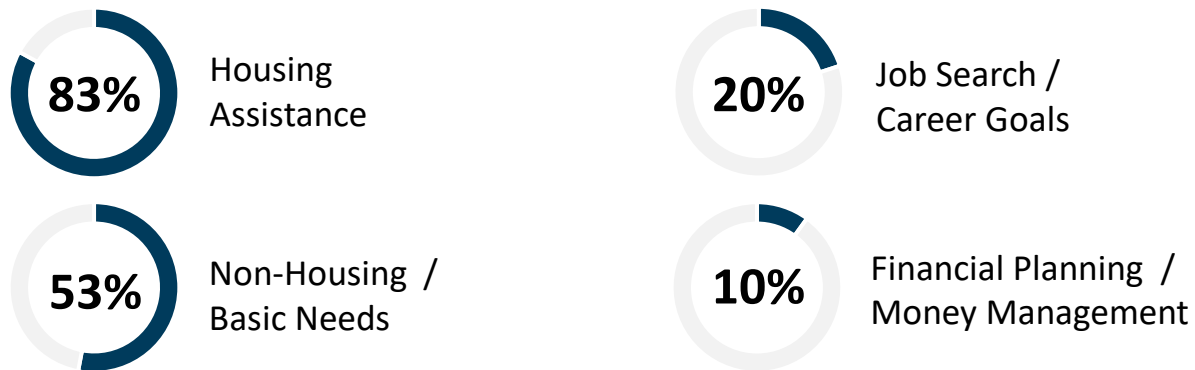
At least 7% of clients requested translation services

CHI Housing Security Strategies

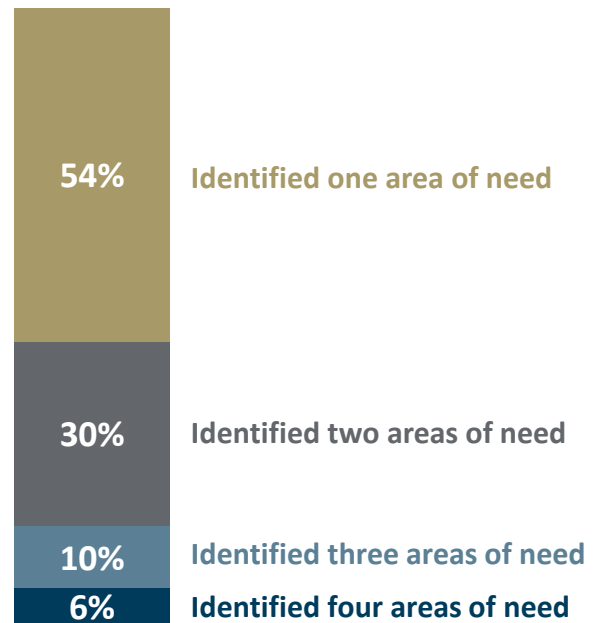
WATCH CDC and Metro West CD are using a multi-faceted approach to reduce housing insecurity and inequities among low-income tenants requesting assistance. Individuals requesting support from WATCH CDC and Metro West CD must first complete a Client Intake Form, identifying their overarching challenges areas, requesting help in the following four areas: housing assistance, non-housing/basic needs support, job search or career goals, and financial planning or money management. Mental health needs will be documented in the second year of this grant.

Case managers documented at least one overarching challenge area for nearly all (96%; 662) clients receiving services during the first year of the grant. The vast majority of clients requested help with housing assistance, and more than one-half with non-housing/basic needs support.

Percentage of Clients Requesting Help with:



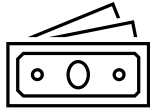
Nearly one-half of clients requested support on multiple challenges, highlighting the **multitude and complexity of issues facing WATCH CDC and Metro West CD clients and impacting their housing insecurity.**



The following pages highlight WATCH CDC and Metro West CD's progress addressing each of the areas of support noted above as well as their community advocacy efforts during the first year of the grant.

CHI Strategy: Housing-Focused Case Management

To address clients' immediate housing insecurity, WATCH CDC and Metro West CD provide **housing-focused case management, basic needs support and referrals, and emergency financial assistance**. Each organization takes a distinct approach to providing these services as described below. Moreover, the NWH Housing Security CHI allocated \$100,000 annually for direct emergency financial assistance to eligible clients. The grant dollars are distributed by both organizations through WATCH CDC's previously established Tenant Assistance Fund (TAF). Through TAF, clients may receive grants of up to \$3,000 for **utility and rent arrears, emergency housing, and first/last months' rent and security deposits**.



129 housing clients received TAF grants totaling more than \$225,000, during the first year of this initiative

The NWH Housing Security CHI grant provided \$100,000 of these dollars, directly funding 79 TAF grants to 55 WATCH CDC and Metro West CD clients



Building off their long-standing Housing Clinic model, **WATCH CDC** continued to provide free, housing-related case management services virtually to **more than 600 clients on behalf of their households** during the first year of the grant.

The process for accessing services begins when Waltham residents complete the Client Intake Form located on WATCH CDC's website, providing key household characteristics as well as information about their specific service needs related to both housing and non-housing / basic needs. WATCH CDC's Case Managers follow up with individuals within 48 hours to better understand the full context of their situation as well as the immediacy and severity of household needs in order to provide the appropriate support services and referrals in a timely manner. During the first year of the grant, **more than 500 clients requested housing assistance**, the most common challenge being **behind on rent** and related issues with eviction, challenges with their landlord, and poor housing conditions. Furthermore, **more than 300 households requested support with non-housing / basic needs**, most commonly addressing **food insecurity** and **support with fuel and utility bills**. WATCH CDC successfully helped many of these families to apply for and receive state rental assistance (RAFT) and TAF grants to help cover rent and utilities.

487

WATCH CDC clients requested housing assistance

320

WATCH CDC clients requested support with non-housing needs

WATCH CDC staff noted that the sheer volume and need of clients was their largest challenge. Beyond core services, clients need assistance with housing search and other housing-related needs that staff do not have the time to accomplish on an individual basis. Consequently, WATCH CDC has started providing "walk-in" virtual housing clinics on various topics, including how to conduct a housing search, how to apply for fuel assistance, and how to apply for public housing, with interpreters available. In addition, WATCH CDC plans to partner with Lawyer's Clearinghouse to provide clients with at least one legal workshop annually starting in the second year of the grant.

CHI Strategy: Housing-Focused Case Management



Metro West CD has expanded its existing Housing Clinic model – from a weekly to a twice weekly virtual housing clinic – and added individual appointments providing free housing-focused case management services to **68 clients on behalf of their households** during the first year of the grant.

Case management begins when an individual facing housing insecurity or another agency on behalf of a client contacts Metro West CD expressing a need. Clients complete the 5-Town Assistance Form either directly online on Metro West CD's website or with the help of staff over the phone. Individual Housing counseling sessions are intensive one-one-one client meetings with the Senior Affordable Housing Programs (Case) Manager. If a client completed the General Housing Clinic Interest Form instead of the 5-Town Assistance Form, during their counseling session, the Case Manager will assist the client in completing the 5-Town Assistance Form. During the counseling session, the Case Manager will ask for descriptions of the key challenges they are facing and identify key priorities to provide the necessary context and information for the Case Manager to provide individualized support, information, and referrals to meet the client's most urgent needs. Metro West CD's Case Manager continues to provide individualized case management support following the initial Housing Counseling session.

Nearly all of Metro West CD's clients requested support with housing concerns, with the vast majority requesting **support with housing search** due to **lack of affordable housing**, as well as assistance paying first and last month's rent and security deposit to secure new housing. Metro West CD staff emphasized the lack of truly affordable housing in the communities being served, explaining that there is both not enough housing and that the housing that exists is too expensive. In addition, **approximately 30 households requested support with non-housing / basic needs**, with the vast majority requesting **support paying their fuel and utility bills**.

64

**Metro West CD clients
requested housing assistance**

31

**Metro West CD clients
requested support with non-
housing needs**

Finally, it should be noted that Metro West CD's General Housing Clinic is available to residents of more than twenty towns – well beyond the six communities explicitly targeted through the Housing Security CHI. Given the limited number of Housing Clinic slots available weekly and in recognition of the grant's aim to provide additional services beyond housing search, and rent and utility assistance, Metro West CD created a separate intake form (5-Town Assistance Form) on their website to increase awareness of and engagement in services available to residents of the grant's six focused communities. Metro West CD has had success in steering clients in need to the appropriate services since separating the two intake forms on the website but will continue to monitor and adapt their recruitment strategy to best reach, engage, and serve their community.

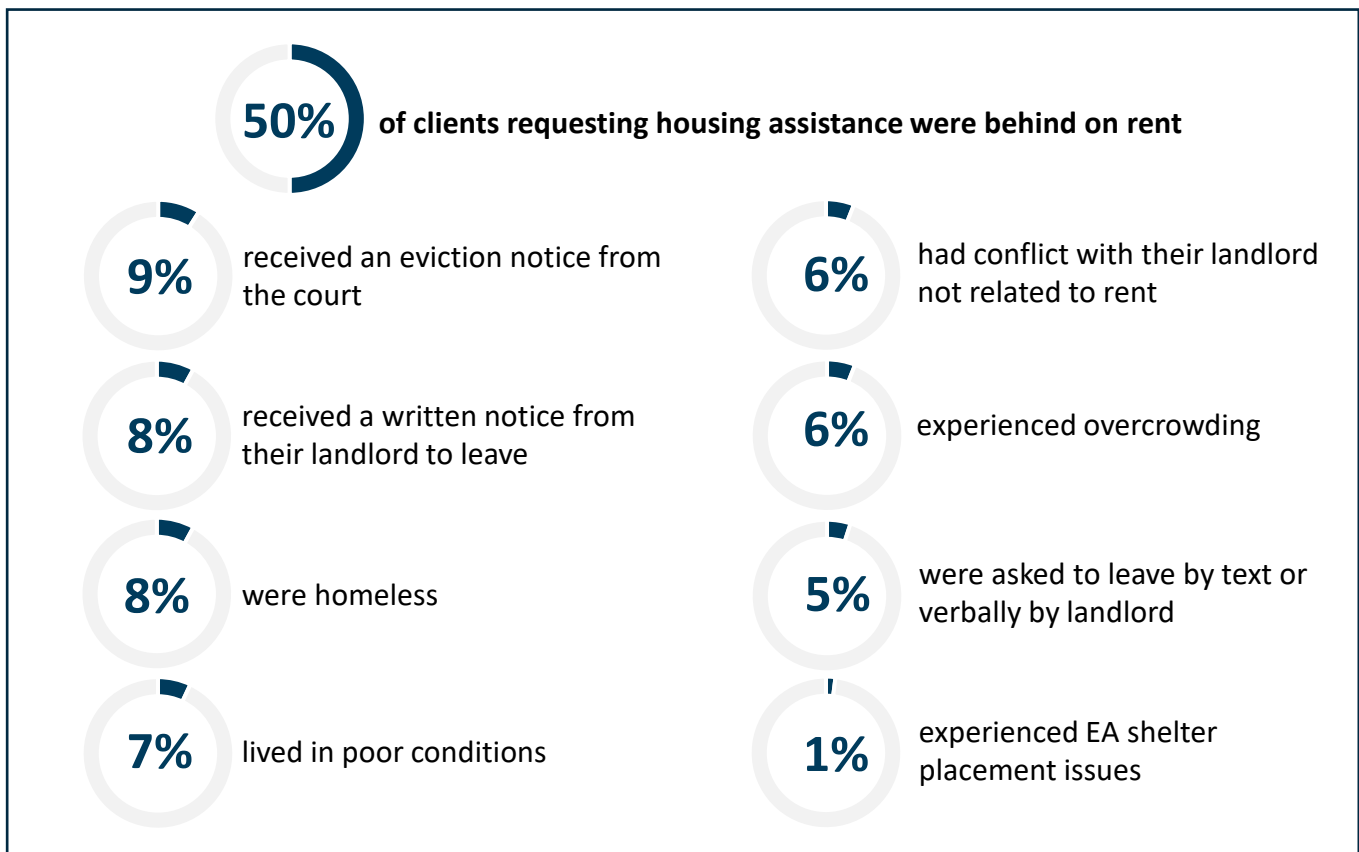
Clients Requesting Housing Assistance

Individuals contacting WATCH CDC and Metro West CD for services were asked whether they needed housing assistance, and, if so, what specific problems they were facing. Clients identified a multitude of housing-related challenges, the most common being behind on their rent payments. Many clients reported having multiple problems related to housing.

551

clients requested housing assistance during the first year of the grant.

Housing problems reported, include:



Comparing organizational data highlighted key differences in client needs. First, more than one-half (55%) of WATCH CDC's clients requesting housing assistance reported being behind on rent compared to only 11% of Metro West CD's clients. Second, nearly all (94%) of Metro West CD's clients requesting housing assistance were seeking help with housing search as compared to only one-quarter of WATCH CDC's clients. More detailed information on housing search needs and services provided can be found on pages 17 and 18.

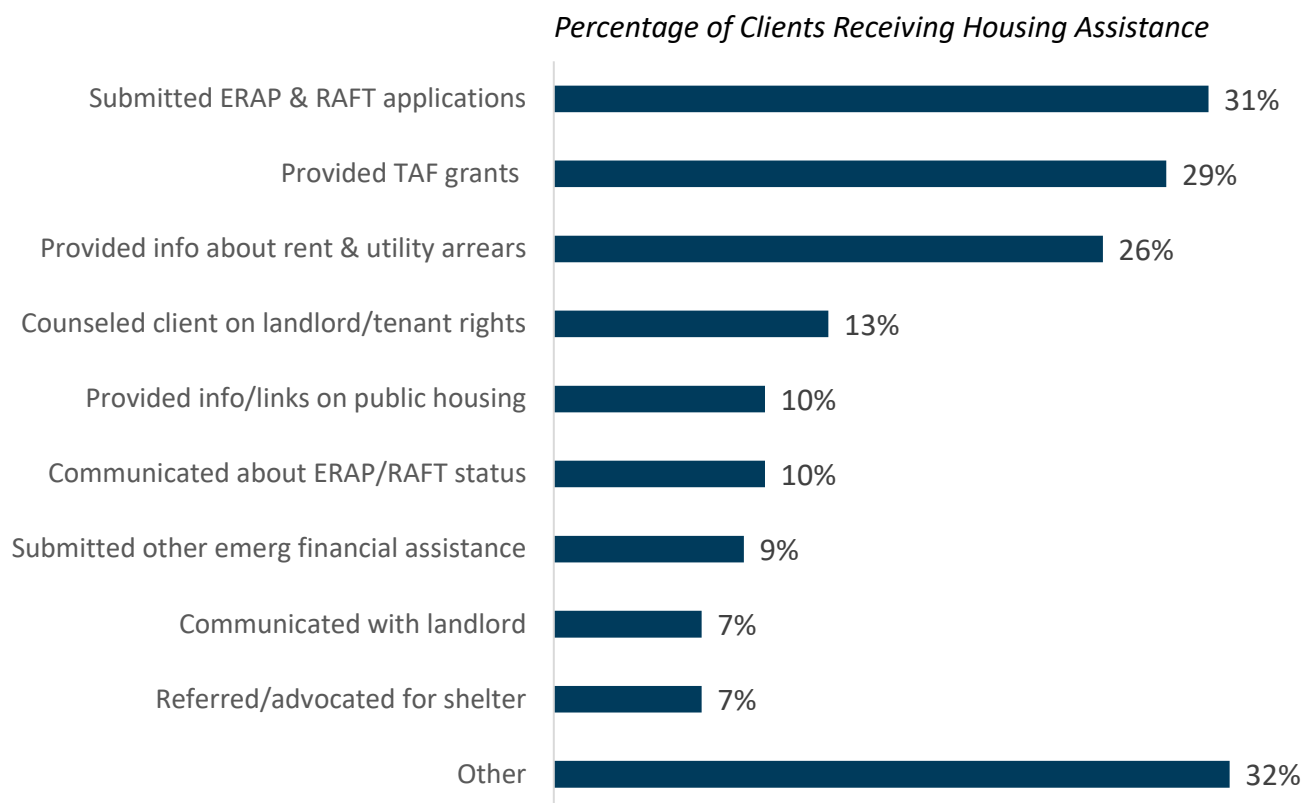
Housing Assistance Services Provided

440

Clients received 823 documented housing assistance related actions.

WATCH CDC provided services to the vast majority (94%) of these clients.

During the first year of the grant, WATCH CDC and Metro West CD provided housing assistance to at least 440 clients. Case managers provided a broad range of specific housing assistance services and actions based on the individual needs of their clients; many received more than one of these services. The specific services most frequently provided to clients receiving housing assistance include submitting applications for Emergency Rental Assistance Program (ERAP) and Residential Assistance for Families in Transition (RAFT), distributing Tenant Assistance Funds (TAF) grants, providing information about and resource links for rent relief and utility arrears, and other housing related actions.



Additional housing assistance services not listed above, that were provided to fewer than 5% of clients receiving any housing assistance, include: provided support at Housing Court; provided information on Health Department and sanitary codes; completed housing applications; scheduled Health Department inspections; referred to homelessness prevention programs; and answered court summons.

Further review of the data highlighted key differences in the types of housing assistance services taken by the two organizations. The vast majority of Metro West CD's actions centered on two services: providing information and resource links for rent relief and utility arrears and distributing TAF grants to their clients. WATCH CDC provided a much broader array of housing assistance services to their clients, with completing and submitting ERAP and RAFT applications being the most frequent.

Housing Clinic Case Management Successes

Both WATCH CDC and Metro West were asked to provide a brief narrative or case description of a client or household engaged in their program during the first year of the grant who exemplified the impact of the housing clinic case management services.



“The effects of COVID were catastrophic, especially for those who lost their jobs and had no stream of income. One client was particularly burdened by the pandemic. Working as a caretaker for nearly 20 years, she lost her last client to COVID, which left her unable to pay her bills. She then experienced an insufferable amount of harassment from her landlord. She turned to the Housing Clinic. The clinic was able to help her apply for RAFT and apply for a new apartment. In July 2022, the client was able to move into her new apartment.”



“We helped a young mother who had a 6-year-old daughter and was pregnant expecting her 2nd child next year. She is currently living in a temporary affordable residence in the service area. Her work hours were decreased during COVID so she needed help paying her rent, electric and gas bill. She received funding to help cover her past due bills and was provided assistance with and information on how to find and apply for a more permanent affordable unit.”

Clients Requesting Housing Search Supports

Clients requesting housing assistance were also asked whether they needed or wanted to move, and, if so, what obstacles were preventing them from successfully finding a new place to live. **One-third of clients requesting housing assistance reported that they needed or wanted to find a new place to live, but that there were many obstacles preventing them moving forward.** The most commonly reported challenges were the limited supply of housing options / apartments available in their price range and their inability to pay first and last months' rent and security deposit.

181

clients requested housing search assistance.

Obstacles preventing clients from moving and finding a new place to live, include:

64%

of clients requesting assistance with housing search could not find apartments available in their price range

50%

needed first and last months rent and security deposit

29%

had poor credit

18%

had no documentation of work or income

12%

had no landlord references

9%

struggled to fill out application forms

9%

have pets

8%

have a language barrier

3%

had a voucher

1%

have a criminal record

27%

other

Further data review revealed key differences by organization. Nearly all (94%) of Metro West CD's clients requesting housing assistance also requested assistance with housing search as compared to only one-quarter of WATCH CDC's clients. Review of obstacles preventing clients from moving indicated that WATCH CDC clients were significantly more likely to report barriers in the ability to pay first and last months' rent and security deposit (58%) compared with Metro West CD's clients (35%). WATCH CDC's clients were also more likely to report experiencing the challenges of language barriers, difficulty completing applications, and not having landlord references compared to Metro West CD's clients.

Housing Search Services Provided

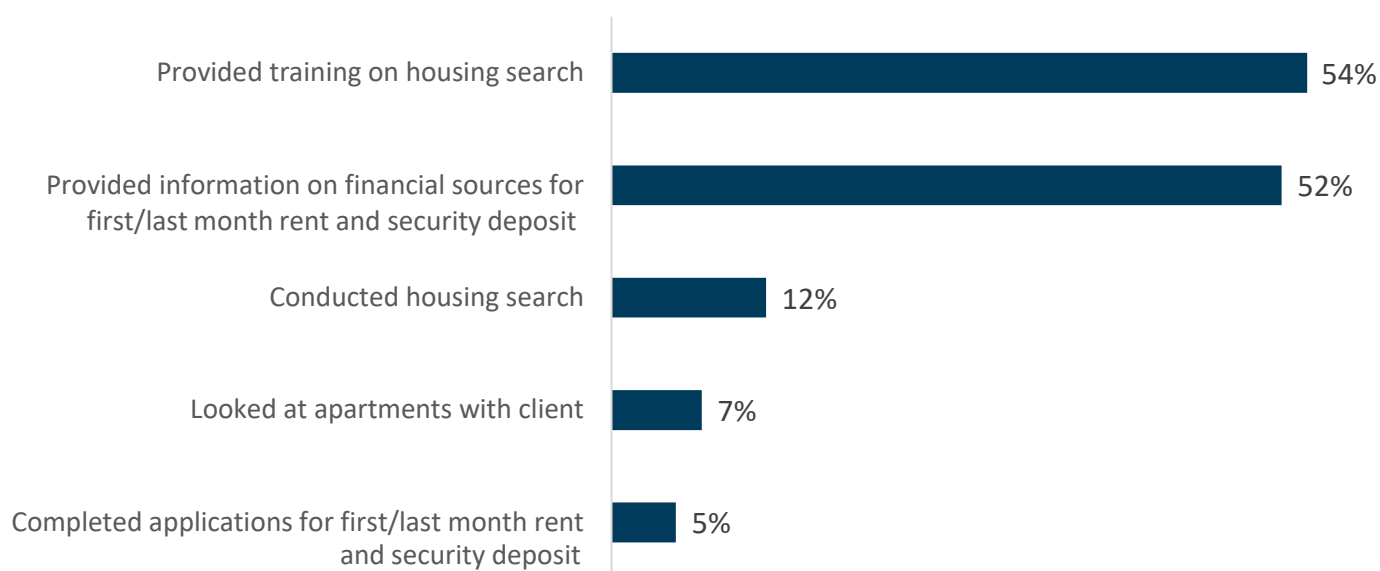
87

Clients received 112 documented housing search related actions.

WATCH CDC provided services to three-quarters of these clients.

During the first year of the grant, WATCH CDC and Metro West CD provided housing search related services to nearly 90 clients. More than one-half of these clients received training on how to conduct a housing search and/or information on how to find and apply for financial assistance to help cover their first and last month's rent and security deposit.

Percentage of Clients Receiving Housing Search



Further data review highlighted key differences in the types of housing search actions provided by the two organizations. The majority of Metro West CD's documented housing search actions centered on providing training to clients on housing search, whereas the majority of WATCH CDC's actions focused on providing information and resource links for providing first/last months rent and security deposits.

Given the volume and level of needs of their clients, WATCH CDC reported that their staff do not have the time to provide clients with housing search assistance on an individual basis. To begin to address this need, WATCH CDC started providing "walk-in" virtual housing clinics on various topics, including how to conduct a housing search, enabling WATCH CDC staff to provide information to larger groups of clients during a designated time period.

Clients Requesting Non-Housing Support

WATCH CDC and Metro West CD clients were also asked whether they needed help with non-housing / basic needs supports, and, if so, what specific challenges they were facing. Clients identified a multitude of basic needs challenges, the most common being financial with limited funds to pay for food or their fuel/utility bills. Many clients reported needing assistance on multiple non-housing / basic needs.

351

Clients requested assistance with non-housing / basic needs.

Non-housing / basic needs challenges, include:

44%

of clients requesting non-housing / basic needs supports needed help paying their fuel or utility bills

33%

did not have enough money for food

11%

needed critical household items

10%

had non-housing legal issues

9%

needed childcare or programs for children

9%

had mental health needs

9%

recently moved or was moving and needed furniture

8%

had immigration questions

4%

needed ESL, citizenship classes, or GED classes

4%

needed help with preparing taxes

2%

needed a cellphone

2%

experienced domestic violence

1%

needed health insurance or a medical referral

Approximately one-half of both WATCH CDC (54%) and Metro West CD (46%) clients requested support for non-housing / basic needs services. Further comparisons between organizations are not provided due to the low number of Metro West CD clients (n=31) requesting support.

Non-Housing / Basic Needs Services Provided

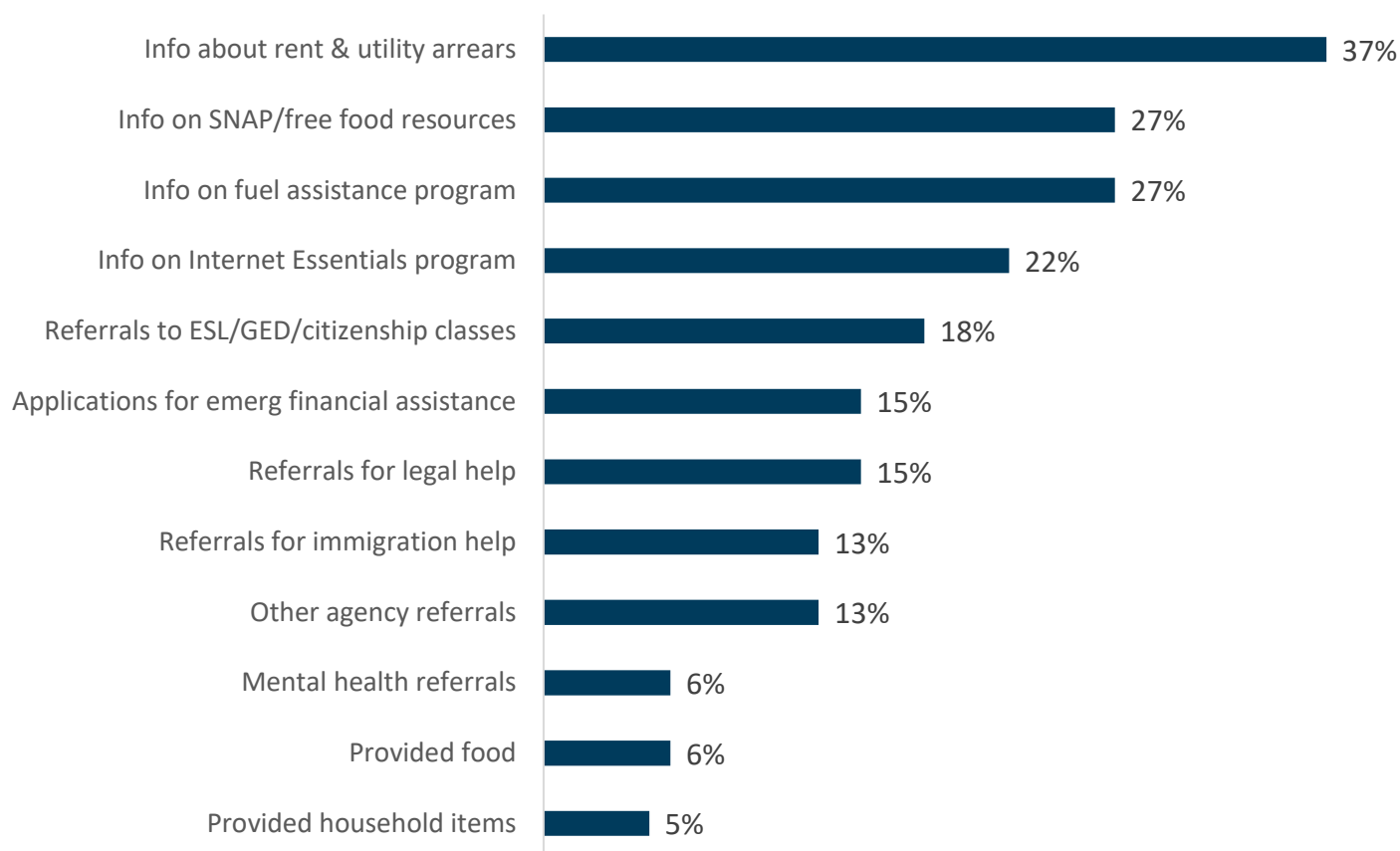
254

clients received 575 documented non-housing/basic needs related actions.

WATCH CDC provided services to the vast majority (93%) of these clients.

During the first year of the grant, WATCH CDC and Metro West CD provided non-housing support services to more than 250 low-income households, with many requesting assistance to address multiple basic needs. Case managers provided a broad range of non-housing supports and referrals based on the individual needs of their clients. The specific services most frequently provided to WATCH CDC and Metro West CD clients receiving non-housing support included providing program information and resources to help their clients pay their rent and utility arrears, address food insecurity (i.e., Supplemental Nutrition Assistance Program (SNAP) or local food pantries), and to receive fuel assistance (i.e., LIHEAP) to help cover their heating bills. In addition, many clients received referrals to local community partners to access supports related to education, immigration and legal services, medical and mental health services, childcare, and domestic violence.

Percentage of Clients Receiving Non-Housing Assistance

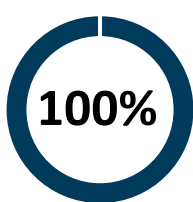


Other non-housing related services not listed above, provided to fewer than 5% of these clients, include: making referrals for childcare / youth services, medical services, domestic violence agencies (REACH), free tax preparation (VITA), and free phone service (SafeLink); supporting arrangements to obtain furniture and household goods; and completing applications for nutritional food assistance programs (SNAP and WIC).

CHI Strategy: Prioritizing Mental Health

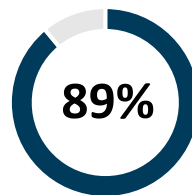
To strengthen awareness of and support for the mental health needs of clients experiencing housing insecurity, WATCH CDC contracted with a bilingual **mental health consultant**. First year accomplishments include:

- **Identified at least 15 local mental health providers** who accept MassHealth. Resource information included whether accepting new clients, providers' intake process, services offered, and languages spoken. Both WATCH CDC and Metro West CD hope to establish stronger working relationships with these providers over the coming years.
- Provided a **staff mental health workshop**, *Housing Insecurity & Anxiety: How to best respond to clients in distress*, to 13 WATCH CDC and Metro West CD staff members. The workshop was well received. As a result of training, staff reported:



can better identify signs of stress, anxiety, and mental health needs of clients

learned something that they plan to directly apply or use in their work



feel more comfortable asking screening questions to identify stress and anxiety related to housing and basic needs

now know steps to be taken to help a client access mental health resources and services

Staff reflections about the importance and impact of participating in training

To realize that people may need more than just the service or need they are calling for and that the fact they have this need is likely causing them added stress and anxiety that they could benefit from it being addressed.

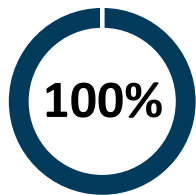
I am excited to apply what we learned about interacting with clients – such as tone/speed of voice, overall being a non-anxious presence for the client.

I work directly with people who have housing problems, I had an understanding of how much this affects their mental health, I was looking for resources to refer them and I am glad this workshop offered those to me so I could now provide that information to people who need more than just rental assistance.

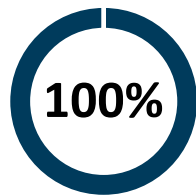
Staff from both organizations are eager to strengthen their skills to recognize needs, comfortably and appropriately discuss issues of mental health with their clients, and refer them to high quality, affordable providers in the area. Staff indicated they would benefit from additional time to practice conversations and skills on how to talk about mental health with their clients, learn more about how different cultures view mental health, and develop strategies to promote self-care for staff. Staff reflected that the largest current obstacle to supporting the mental health needs of their clients is the scarcity of affordable mental health providers available for their clients, especially those who are undocumented. Moreover, staff noted how health care providers are overwhelmed with patients, further limiting client access to much needed resources.

CHI Strategy: Prioritizing Mental Health

- Provided a **client mental health workshop**, *Managing Stress*, in both Spanish and English, to 16 housing clients. As a result of attending, clients reported:



learned new ways to help manage and reduce stress



learned about other mental health resources and providers available

Client reflections about the importance and impact of participating in training

Siempre buscar estar conectada con alguien para expresar sus sentimientos.

Modos de respirar para calmar la ansiedad. También usar mis 5 sentidos más para poderme calmar.

- **Reviewed and revised client intake protocol** to better identify the mental health needs of clients. Two mental health related screening questions from the General Anxiety Disorder (GAD-7) scale were incorporated in December 2022 and related information will be recorded and reported on during the second year of this grant.

Screening Questions

*Over the last two weeks, how often have you been bothered by the following problems **related to meeting housing and basic needs**? (Not at all, Several days, Over half the days, Nearly every day)*

- 1. Feeling nervous, anxious, or on edge*
- 2. Not being able to stop or control worrying*

Based on the rating and frequency provided by clients, providers will provide various resources, including literature on mental health, handouts on prevention and coping strategies, information on mental health workshops in the community, information on self-soothing and coping strategies, a link to an anxiety self-assessment to use with their primary care provider, and information on mental health providers and psychiatric emergency services (PES), as well as support contacting as needed.

CHI Strategy: Supporting Economic Independence

Through the NWH Housing Security CHI grant, WATCH CDC was able to hire a full-time Job and Financial Planning Coordinator to support and mentor clients to greater financial self-sufficiency. The bilingual coordinator **launched the Job and Financial Management Clinic in March 2022 providing both one-on-one counseling sessions and group educational workshops** to housing clients requesting help with job search and/or financial management. The goal of the clinic is to mentor low-income community residents through job search and financial planning supports, thus, strengthening their economic independence and, in turn, stabilizing their housing security.

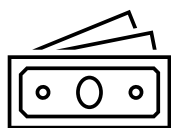
Primary services offered through the Job and Financial Management Clinic include:



One-on-one counseling sessions with clients to help the Job and Financial Management Clinic Coordinator understand the unique background and individual needs of each client. Together they establish plans and necessary steps to achieve employment and/or financial planning success.



Virtual educational workshops are provided in both English and Spanish. Workshop topic areas include budgeting and saving, building credit, borrowing basics, creating a resume and cover letter, job search, and job interview preparation and practice.



Back To Work (BTW) grants of up to \$500 for purchases to help individuals return to work. BTW grants are available to clients to support them in removing barriers to work to pay for items, such as car repairs, bus passes, tools, uniforms and work shoes, equipment, training programs, computers, and childcare.

WATCH CDC staff indicated that they would like to attract more Spanish-speaking clients to virtual educational workshops. Barriers to client engagement reported include limited English language proficiency, lack of skills with technology, and very long workdays. To address these challenges, WATCH CDC staff recommend referring and enrolling clients to WATCH CDC's existing free ESL program. Moreover, the Job and Financial Management Clinic Coordinator has developed a computer literacy course—in English and Spanish—to strengthen clients' basic technology skills.

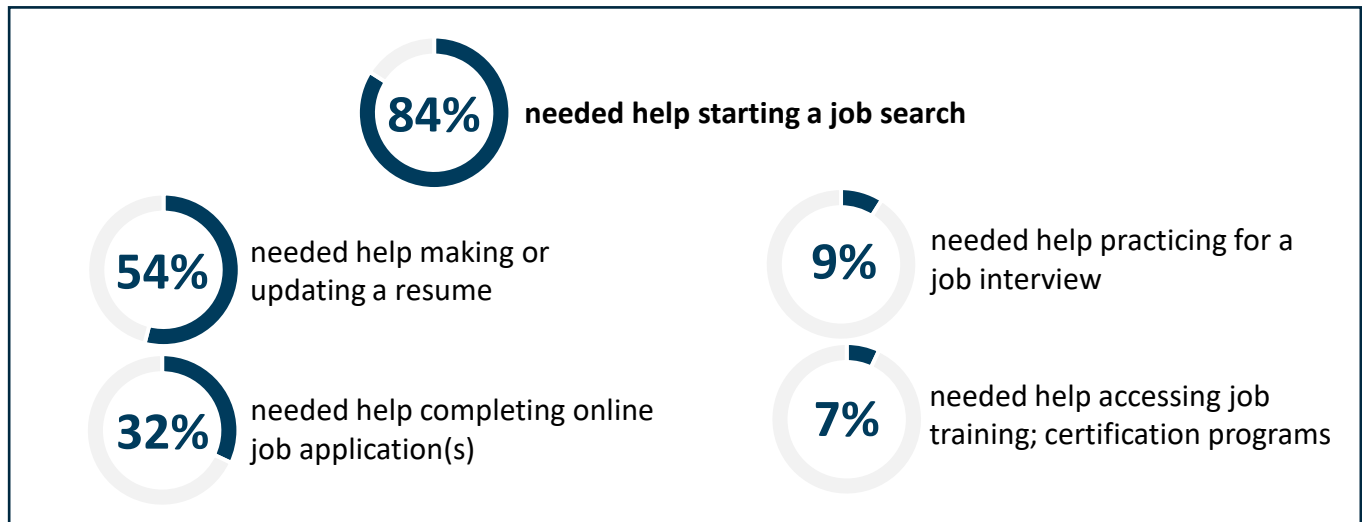
Metro West CD refers their clients looking for job and financial planning supports to WATCH CDC. However, only a limited number of Metro West CD's clients took advantage of this service during the first year. WATCH CDC and Metro West CD will work together to create a more effective referral and communication path to ensure that all clients in need of these services are aware of and receive job support and financial management services moving forward.

Clients Requesting Job Support or Financial Planning

Individuals contacting WATCH CDC and Metro West CD for services were asked whether they needed help with either job search and career goals and/or financial planning and money management. Nearly one-quarter of clients (n=152) requested assistance with at least one of these supports in order to strengthen their economic independence.

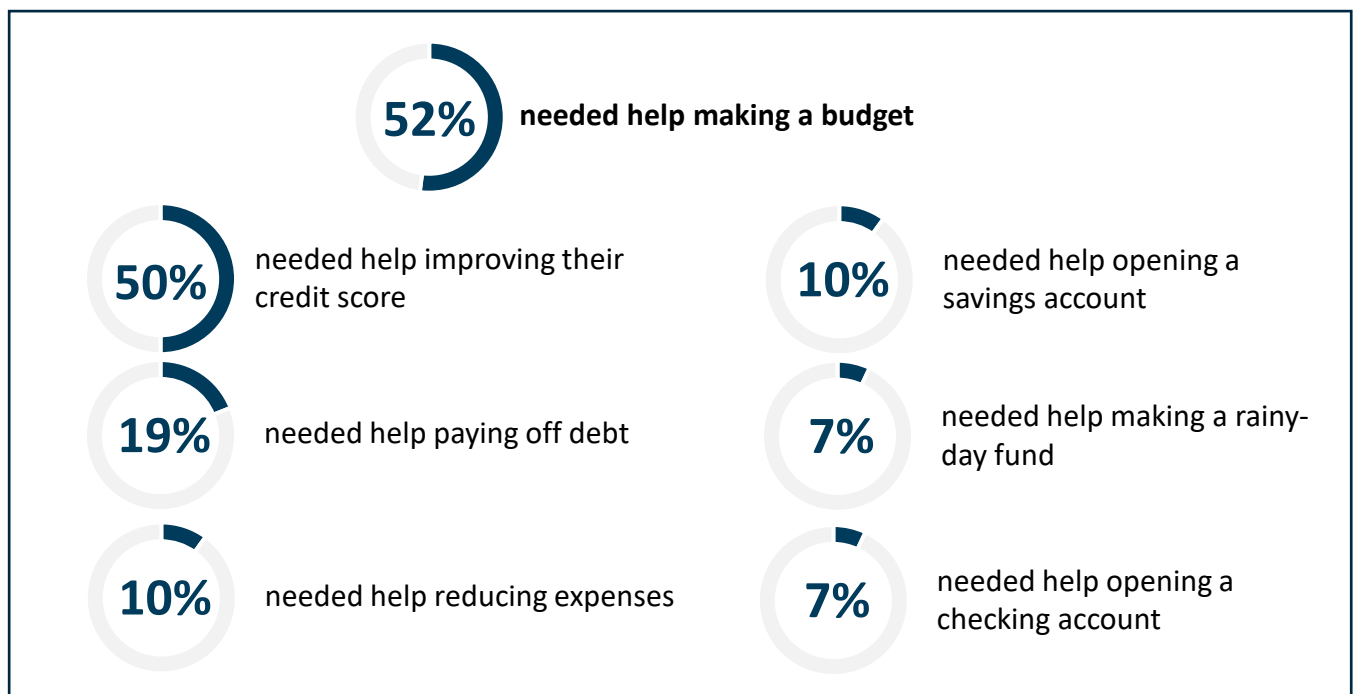
130

clients requested job support, with the vast majority requesting help starting a job search.



68

clients requested support with financial planning & money management, with half requesting help creating a budget and improving their credit score.



Job and Financial Planning Services Provided

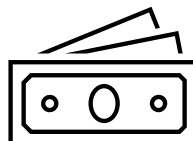
159

clients participated in Job and Financial Planning Clinic services,

with more than one-half receiving individual counseling sessions with the Coordinator. Nearly all (93%) participants were WATCH CDC clients.



83 housing clients participated in individual counseling sessions with the Job and Financial Planning Coordinator.



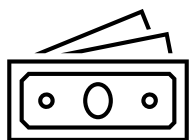
WATCH CDC distributed a total of **\$2,800 in financial incentives to 52 housing clients** for their active engagement in the Job and Financial Clinic.



Moreover, the Job and Financial Planning Coordinator presented **46 online workshops**—25 focused on job support and 21 on financial planning—with twenty of these workshops offered in Spanish. More than 200 clients and community residents participated in at least one of the Job and Financial Planning Clinic workshops, with many participating in multiple sessions.

Job support activities and topics covered included job search, creating and updating resumes and cover letters, completing online job applications, computer basics, practicing for job interviews / mock interviews, and identifying and accessing job training, certification programs, and school opportunities.

Financial planning and money management activities and topics covered included income and expenses, opening checking and savings accounts, making a budget, borrowing basics, saving and creating a rainy-day fund, paying off debt, reducing expenses, building and improving credit.



Finally, **37 housing clients received 65 Back to Work (BTW) grants totaling more than \$18,000. The NWH Housing Security CHI grant directly funded 24 BTW grants to 15 housing clients for a total of \$6,984.** BTW grants, up to \$500, are to be used for a one-time expense that will enable applicants to better access work opportunities. Examples include childcare, bus passes, car repairs, uniforms, tools, equipment, computers, and training programs. Grants were available to those who have lost income or job access due to the COVID-19 pandemic.

Job and Financial Planning Success Stories

Both WATCH CDC and Metro West CD were asked to provide a brief narrative or case description of a client or household engaged in their program during the first year of the grant who exemplifies the impact of the job and financial planning clinic services.



"The Job and Financial Management Clinic Coordinator helped me start my resume from the start, step-by-step, when I was completely lost with what I was doing. We put together my whole resume through Zoom meetings and emails. The clinic also provided a lot of great materials such as videos and presentations that provided a lot of insight. I'm grateful for all the help I received, and all the doors the clinic helped me open."

- WATCH CDC Housing Client



[The Metro West CD case manager] counseled a woman who recently had a child and was a stay-at-home mother. But her husband lost his job and was having difficulty finding another. She was ready to return to work. A job referral was made to Carlos at WATCH CDC. She got her real estate license and was given Back-to-Work funds to help pay for interview clothes, gas, and her MLS listing services.

- About Metro West CD Housing Client

Finally, outreach to clients revealed that many were already making progress toward their goals with the support provided at WATCH CDC's Job and Financial Management Clinic.

36

clients got a job

2

clients attended job training or certification programs

8

clients reduced their expenses

1

client improved their credit score

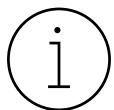
CHI Strategy: Promoting Community Advocacy

WATCH CDC and Metro West CD both have a strong history in community organizing to protect and increase access to safe and affordable housing and tenant advocacy for low-income individuals and families within the communities they serve. Both organizations participate in a broad range of community engagement and advocacy efforts, participating in local and regional meetings with community partners and soliciting input, active engagement, and leadership from clients most affected by housing insecurity. During the first year of this grant, community advocacy has been focused on organizing support for a local ordinance to protect tenant rights.

Tenant Rights Notification Act

WATCH CDC's Housing Clinic clients are encouraged to join the Tenant Action Group (TAG), where they can learn more about their rights as tenants, how housing policy is made, and engage in advocating for municipal housing policy decisions that will impact their lives. Meeting monthly, TAG members, supported by WATCH CDC's Community Organizer, identify ways to impact local decision-making through public speaking, door-to-door canvassing, outreach at community events, and public testimony.

As part of the Housing Security CHI, TAG members are organizing support for a local ordinance, ***the Tenant Rights Notification Act***, that would require landlords to notify tenants of legal and financial resources when they are facing eviction. Information and planning around this ordinance was led by WATCH CDC's TAG with members building support and outreach through the following activities and events this year:



2 tabling events held



700 petitions signed



12 canvassing events held



250 letters written



12 organizational & landlord endorsements of Tenant Notification Ordinance

While the TAG has successfully increased outreach, awareness, and support for the Tenant Rights Notification ordinance, they have not yet been able to secure a sponsor for the Ordinance from the local City Council, despite several attempts and information sessions held with City Councilors. WATCH CDC and TAG are exploring alternative strategies, including working directly with residents to introduce the Ordinance. TAG members are working to obtain a representative from each Ward to sign a letter of support to introduce the Tenant Rights Notification Act. Further outreach, engagement and advocacy efforts will continue forward to safeguard and support tenants' rights.

Conclusion and Next Steps

The first year of the NWH Housing Security CHI proved successful in strengthening organizational capacity necessary to provide services. In fact, WATCH CDC and Metro West CD exceeded their goal of assisting 600 clients and did so in less than a full year. Furthermore, they successfully reached their intended priority population.

Both WATCH CDC and Metro West CD are committed to reducing housing insecurity and inequities prioritizing the four key CHI strategies during the second year of the grant.

- **Housing-Focused Case Management and Emergency Financial Assistance** – WATCH CDC plans to serve at least 500 clients and Metro West CD plans to serve at least 100 clients during the second year of this grant. Both organizations will continue providing their existing housing-focused case management services to address clients' unique housing and non-housing needs and agree to enter related documentation in the Salesforce Client Case Management System. Next year, WATCH CDC also plans to partner with Lawyer's Clearinghouse to provide clients with at least one legal workshop. Finally, the grant has designated \$100,000 in emergency financial assistance grants to be allocated to eligible clients during the second year of the grant. Case managers will explore ways to follow-up with clients three to six months following services to further explore client outcomes.
- **Mental Health Supports:** WATCH CDC and Metro West CD will continue their work with the Children's Charter bilingual mental health consultant, including providing an annual mental health capacity building workshop for staff and clients. Furthermore, two mental health screening questions have been added to the Client Intake Form and data in the Year 2 Annual report will provide additional detailed information on the number of clients requesting support with stress, anxiety, or depression related to housing or financial difficulties and the related services and referrals provided.
- **Strengthening Clients' Economic Independence:** WATCH CDC will continue to provide job support and financial planning and management services through individual counseling sessions and educational workshops with a goal of serving at least 100 clients during the second year of the grant. WATCH CDC will focus their efforts on increasing outreach to attract more Spanish speaking clients to participate in the Job and Financial Management Clinic services. Metro West CD is working closely with WATCH CDC to increase referrals to and usage of Job and Financial Management Clinic services during the second year of the grant. WATCH CDC will pilot strategies to follow-up with clients three to six months following services to further explore client outcomes.
- **Promoting Community Organizing and Advocacy:** WATCH CDC and Metro West CD will continue to promote community organizing and advocacy to protect and increase access to safe and affordable housing and tenant advocacy for low-income individuals and families within the communities they serve. The organizations will solicit input, active engagement, and leadership from clients most affected by housing insecurity. WATCH CDC and their Tenant Action Group (TAG) will continue to focus their efforts on increasing outreach, awareness, and support for the Tenant Rights Notification ordinance.

The impact of this work will be examined and summarized in the Year 2 Housing Security CHI Annual Report, covering the time period of December 1, 2022 through November 30, 2023.