

APPENDIX C - Goals, Strategies, and Action Items

Virginia’s Plan to Increase Independent Living Options, 2013 – 2015

Goals, Strategies, and Action Items

Primary Goal—Affordability

Goal #1: Enable people with intellectual and developmental disabilities to afford quality, accessible, independent community living options of their choice

Long-Term Outcome: Increased ability to afford independent community living options by extremely low-income members of the target population including those depending mainly on SSI income

Indicators:

- ***Increased access by the target population to rental assistance***

Strategy 1.1: Partner with Public Housing Agencies to prioritize the rent subsidy needs of people with intellectual and developmental disabilities

| Lead Agency(s) | Recommended Actions(s) | Other Agencies/Orgs Involved | Projected Start Date | Projected Completion Date | Program Outcomes | Resources \$\$\$ |
|----------------|--|------------------------------|---|---------------------------------------|---|---|
| VHDA | 1.1.1. Subject to Fair Housing approval by HUD, Administer a special admissions preference for the target population through a state-wide set-aside of units within VHDA’s Housing Choice Voucher Program. | DBHDS (referrals to VHDA) | 1/2013— Request HUD approval 9/2014— Start program | Final HUD approval pending Ongoing | Provision of tenant-based rent subsidies to 32 members of the target population | Federal Housing Choice Voucher Program |
| DBHDS and SILC | 1.1.2. Encourage local Public Housing Agencies to adopt a “Money Follows the Person” and I/DD admissions preferences in their rental assistance programs. | VBPD, CILs and CSBs | 3/2013 | Ongoing | Local PHAs create MFP and I/DD admin. preferences | Existing state administrative resources to conduct outreach |

Strategy 1.2: Pursue and develop funding sources to expand availability of rental assistance for the target population.

| Lead Agency(s) | Recommended Actions(s) | Other Agencies/Orgs Involved | Projected Start Date | Projected Completion Date | Program Outcomes | Resources \$\$\$ |
|----------------|--|---|--|--|---|--|
| DHCD and VHDA | 1.2.1 Apply to HUD for a Section 811 grant under Round II of the state demonstration to provide project-based rental assistance in new and existing housing developments in Northern Virginia and Hampton Roads linked with access to Waiver support services | DBHDS and DMAS | 5/2014— Application submitted to HUD for 130 units | TBD based on receipt of grant from HUD | 130 rent subsidized units in Northern VA and Hampton Roads preferentially set aside for the target population | New federal HUD Section 811 rent subsidy resources, new and existing state administrative resources, and new state resources for subsidy reserve |
| DBHDS | 1.2.2 Develop and implement a three-year pilot state rental assistance program targeted to Fairfax County and Virginia Beach | Development of pilot: VHDA, DHCD, CSBs and other local partners | Jun 2013 | Nov 2013 | Provision of tenant-based rent subsidies to 18 members of the target population | Existing state resources (\$800,000 committed in Settlement Agreement) |
| | | Implementation of pilot: CSBs and other local partners | Jan 2014 | Ongoing through June 2016 | | |
| VHDA and DHCD | 1.2.3 Provide program incentives (e.g., additional points in scoring criteria for program applications for the Federal Low-income Housing Tax Credit, HOME and CDBG programs etc.) for PHAs and private developers to partner in using federal project-based rent subsidies to serve the target population. Refine incentives as appropriate to enhance their effectiveness and to provide assistance in the most integrated settings. | | Ongoing | Ongoing | Increased use of available federal project-based rental assistance for units serving the target population | Federal Low-income Housing Tax Credit, HOME, CDBG and etc. Programs |

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| VHDA | 1.2.4 Apply to HUD for any future incremental federal rent voucher assistance | | Upon release of HUD NOFAs | | Additional rental assistance funds to assist the target population | New federal Housing Choice Voucher resources |
| DBHDS and SILC | 1.2.5 Encourage local Public Housing Agencies to apply to HUD for any future incremental federal voucher assistance | VBPD, CILs and CSBs | Upon release of HUD NOFAs | | Additional rental assistance funds to assist the target population | New federal Housing Choice Voucher resources |
| DBHDS | 1.2.6 Submit a budget request to the Governor requesting ongoing rental assistance for individuals with I/DD | DHCD and VHDA | 10/2014 | 1/2015 | Additional rental assistance funds to assist the target population | State General Fund dollars |

Supporting Goals—Expand Choices of Living Environments

Goal #2: Expand quality, accessible, independent community living options for people with intellectual and developmental disabilities in a manner that provides an array of housing choices in a variety of integrated neighborhood settings

Long-Term Outcome: Increased ability of members of the target population to obtain quality, accessible, integrated community housing in locations of their choice

Indicators:

- *Expanded inventory of quality, accessible housing in diverse locations that is available to recipients of tenant-based rental assistance*
- *Expanded share of housing with project-based rental assistance that meets accessibility and Universal Design standards*

Strategy 2.1: Provide incentives and resources for developers to increase the share of newly constructed and rehabilitated rental units available to rent subsidy recipients and to reduce the ongoing subsidy cost of rental assistance

| Lead Agency(s) | Recommended Actions(s) | Other Agencies/Orgs Involved | Projected Start Date | Projected Completion Date | Program Outcomes | Resources \$\$\$ |
|----------------|---|------------------------------|----------------------|---------------------------|---|--|
| VHDA and DHCD | 2.1.1. Provide program incentives and resources to encourage and enable developers to reduce rents below normal program standards. Refine state incentives and capital subsidies as appropriate to enhance their effectiveness in lowering rents and to ensure the availability of lower rent units in integrated settings. VHDA and DHCD will fully utilize available capital resources and subsidies, including new funding opportunities, and will provide program incentives for developers to leverage any available federal, local and private capital subsidies. <i>Must be paired with a rental assistance program for the I/DD population.</i> | | 1/2014 | Ongoing | Increased number of units available to rent subsidy recipients and with rents below normal program limits. <i>Units are not dedicated to I/DD population specifically but the goal of this action item is to increase and maintain an adequate supply of quality rental housing that must accept rental</i> | Existing federal and state capital resources and any new federal, state or private capital funding opportunities |

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| | | | | | <i>assistance, which in turn provides additional options for individuals in the target population.</i> | |
| VHDA | 2.1.2 Increase the amount of credits available under VHDA's LIHTC non-competitive disability pool to 10% of the current year's per capita credit amount. | | 1/2015 | Ongoing | Additional units developed for individuals with disabilities | LIHTC Program |
| VHDA | 2.1.3 Under the LIHTC Program in the competitive credit pool, modify the Qualified Allocation Plan to provide an adjustment to the eligible basis for projects that provide a minimum percentage of Permanent Supportive Housing (PSH) units (so projects can have more market units and internally subsidize rents without needing as many project-based subsidies) | | 1/2015 | Ongoing | Additional units developed for individuals with disabilities | LIHTC Program |
| VHDA | 2.1.4 Under the LIHTC Program in the competitive credit pool, modify the QAP to provide major "bonus points" for projects providing a certain percentage of PSH units with project-based subsidies (e.g., 10%) and agreements with CSBs and/or nonprofits to coordinate access to services (e.g., 50 points) | | 1/2015 | Ongoing | Additional units developed for individuals with disabilities | LIHTC Program |
| DHCD | Explore potential funding opportunities made available via the Weinberg Foundation. | VHDA | Ongoing | | Additional units developed for individuals with disabilities | Private Foundation Funding |

Strategy 2.2: Provide incentives for developers to increase the share of newly constructed and rehabilitated rental units available to rental subsidy recipients that meet accessibility and Universal Design standards

| Lead Agency(s) | Recommended Actions(s) | Other Agencies/Orgs Involved | Projected Start Date | Projected Completion Date | Program Outcomes | Resources \$\$\$ |
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| VHDA and DHCD | 2.2.1 Provide program incentives (i.e., additional points on their competitive Low-Income Housing Tax Credit Application) for developers to provide increased numbers of rental units meeting accessibility and Universal Design standards. Refine incentives as appropriate to enhance their effectiveness and to provide assistance in the most integrated settings. Provide ongoing training to developers on accessibility and Universal Design standards. | | 1/2015 | Ongoing | At least 10 percent of newly financed assisted units meet accessibility standards, and increased use of Universal Design standards throughout new developments. <i>Units are not dedicated to I/DD population specifically, but is the goal of this action item is to increase and maintain an adequate supply of accessible rental housing that must accept rental assistance, which in turn provides additional options for individuals in the target population.</i> | Existing federal and state capital resources |
| DBHDS | 2.2.2 Submit a decision brief to the Governor requesting approval to use \$4.7 M in taxable bonds to subsidize development costs associated with the creation of rental housing for individuals with I/DD | DHCD and VHDA | 6/2014 | 8/2014 | Capital funds to bring down rents in developments serving the target population | VPBA Bonds |

Supporting Goals—Building Awareness of Independent Living Options

Goal #3: Build awareness and understanding of informed choices for independent living among individuals with intellectual and developmental disabilities, families, public and private service organizations, developers, and case managers

Long-Term Outcome: Increased awareness and understanding of community living options with housing decisions made on the basis of informed choice

Indicators:

- ***One percent increase each year in the number of individuals with I/DD waivers who would choose to live independently with supports***
- ***Transition of increased numbers of current waiver recipients to independent living***
- ***Increased number of individuals reporting, during Quality Service Reviews, that they are aware of more integrated or independent housing option***

Strategy 3.1: Develop and Implement a Communications, Advocacy, Outreach, and Education plan

| Lead Agency(s) | Recommended Actions(s) | Other Agencies/Orgs Involved | Projected Start Date | Projected Completion Date | Program Outcomes | Resources \$\$\$ |
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| DBHDS, DMAS, VBPD, and DARS | 3.1.1. Develop a multi-phased communications plan tailored to key audiences that delineates what independent living is and how it can be achieved. Target audience to include, but not be limited to, the following: CSBs, case managers/support coordinators, service providers, individuals in the target population and their families, housing developers, Public Housing Agencies, local entitlement communities, private landlords, regional entities, and others. | VHDA ARC VNPP VACIL VACSB | 9/1/14 | 12/31/14 | Plan complete and implementation under way | Existing DBHDS resources |
| VHDA, DHCD, | 3.1.2. Develop a multi-phased communications plan tailored to key audiences that informs key stakeholders relating to the need for affordable housing | DBHDS, VBPD | 9/1/14 | 12/31/14 | Plan complete and implementation under way | Existing VHDA and DHCD resources |

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| | resources including the production of quality affordable housing options and for rental assistance. Target audience to include, but not be limited to, the following: housing developers/owners, Public Housing Agencies, local entitlement communities, private landlords, regional entities, and others. | | | | | |
| DBHDS | 3.1.5 Convene and coordinate appropriate agencies to maximize public outreach resources to communicate the “new paradigm” message to individuals and their families, regional staff, local agencies, transportation agencies, service providers, and other stakeholders. | | 8/2013 | 4/30/2015 | Increased awareness of housing choices and options for individuals with developmental disabilities | Existing VHDA DHCD DBHDS VBPD resources |
| DBHDS | 3.1.6 Establish baseline of the number of individuals with I/DD waivers who would choose to live independently with supports rather than in a congregate setting | | 12/2012 | 3/2013 | Baseline established | Existing DBHDS and CSB resources |
| DBHDS | 3.1.7 Review and revise if needed, the baseline of the number of individuals with I/DD waivers who would choose to live independently with supports rather than in a congregate setting | | 3/2015 | 6/2015 | Baseline updated | Existing DBHDS and CSB resources |

Strategy 3.2: Build the Capacity of Public and Private Agencies to Assist Individuals with Disabilities and their Families in Making Informed Choices

| Lead Agency(s) | Recommended Action(s) | Other Agencies/Orgs Involved | Projected Start Date | Projected Completion Date | Program Outcomes | Resources \$ \$ \$ |
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| DBHDS | 3.2.1 Provide annual training sessions for I/DD support coordinators to educate them about independent living options and to share information relating to housing resources currently available. | | 1/31/15 | Ongoing | Increase in % reporting new knowledge | Existing DBHDS resources |

Supporting Goals—Review Potential Waiver Changes to Increase Independent Living Options

Goal #4: Review state and local policies to identify potential changes that will facilitate increased access and services and supports that permit Individuals to choose more independent and integrated living options

Long-Term Outcome: Increased Use of Medicaid funding for Independent Living

Indicators:

- ***10% increase each year in the use of Medicaid funding for community living waiver services in independent housing (source: Annual DMAS Aggregate Report)***
- ***Five percent increase each year in the number of people who are new to the waiver requesting services other than congregate services***

Strategy 4.1: Review opportunities to facilitate increased access to independent living options

| Lead Agency(s) | Recommended Actions(s) | Other Agencies/Orgs Involved | Projected Start Date | Projected Completion Date | Program Outcomes | Resources \$\$\$ |
|----------------|---|---|----------------------|---------------------------|---|-----------------------------------|
| DBHDS | 4.1.1 Evaluate the current ID and DD waiver programs to identify service gaps that create barriers to independent living and recommend strategies to close these gaps. | DMAS, VBPD, DARS, ARC, VA CSB, VNPP, CILS | 9/2014 | 12/2014 | Recommendations provided to HSRI and WDAC | Existing DBHDS and DMAS resources |
| DBHDS | 4.1.2. Review potential changes in the Medicaid rate structure, preauthorization process, the allowable activities, the service delivery methodology (e.g., ability to pool hours and/or share a single staff person), etc.; that will reduce reliance on larger congregate housing models, community-based intermediate care facilities, and nursing facilities. | DMAS, VBPD, DARS, ARC, VA CSB, VNPP, CILS | 9/2014 | 12/2014 | Recommendations provided to HSRI and WDAC | Existing DBHDS and DMAS resources |
| Lead Agency(s) | Recommended Actions(s) | Other Agencies/Orgs Involved | Projected Start Date | Projected Completion Date | Program Outcomes | Resources \$\$\$ |

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| DBHDS | 4.1.3. Review Medicaid in-home payments and skilled nursing rate structure to identify opportunities to enhance support for more independent living options. | DMAS, VBPD, DARS, ARC, VA CSB, VNPP, CILS | 9/2014 | 12/2014 | Recommendations provided to HSRI and WDAC | Existing DBHDS and DMAS resources |
| DBHDS | 4.1.4. Review potential modifications to the Medicaid waiver programs to match individual needs to services, and provide individuals with the ability to direct their own waiver resources toward independent living options. | DMAS, VBPD, DARS, ARC, VA CSB, VNPP, CILS | 9/2014 | 12/2014 | Recommendations provided to HSRI and WDAC | Existing DBHDS and DMAS resources |
| DBHDS | 4.1.5. Review Medicaid waiver structure to determine if there are opportunities to expand transition supports, environmental modification, and assistive technology provisions in the current Medicaid ID and DD waiver program to support more independent living options. | DMAS, VBPD, DARS, ARC, VA CSB, VNPP, CILS | 9/2014 | 12/2014 | Recommendations provided to HSRI and WDAC | Existing DBHDS and DMAS resources |
| DBHDS | 4.1.6 Recommend that HSRI explore the potential to fund a housing locator/community guide service under the waiver, which will essentially help individuals access all resources needed to transition into independent living. This would include assistance with connecting the individual with rent assistance and an affordable accessible unit. | DMAS, VBPD, DARS, ARC, VA CSB, VNPP, CILS | 9/2014 | 12/2014 | Recommendations provided to HSRI and WDAC | Existing DBHDS and DMAS resources |

Supporting Goal—Coordinated Plan Implementation

Goal #5: Assess and update the plan, as needed, on an annual basis

Indicator:

- *Plan reviewed and updated by Interagency Committee*

Strategy 5.1: Track, evaluate, and continuously improve upon plan progress

| Lead Agency(s) | Recommended Actions(s) | Other Agencies/Orgs Involved | Projected Start Date | Projected Completion Date | Program Outcomes | Resources \$\$\$ |
|----------------|---|-------------------------------|----------------------|---------------------------|------------------------------|--------------------------|
| DBHDS | 5.1.1 Design evaluation and tracking system for Plan. | Interagency Housing Committee | 12/2013 | 6/2014 | Evaluation plan in place | Existing DBHDS resources |
| DBHDS | 5.1.2. Interagency Housing Committee meets at least quarterly to track and monitor outcomes and indicators. | Interagency Housing Committee | 7/2014 | 6/2015 | Quarterly meetings held | Existing State Resources |
| DBHDS | 5.1.3. Review plan and determine if updating is needed | Interagency Housing Committee | 4/2015 | 5/2015 | Report card format developed | Existing DBHDS resources |
| DBHDS | 5.1.4. Make needed updates to the Plan | Interagency Housing Committee | 5/2015 | 6/2015 | Report card format developed | Existing DBHDS resources |

| Lead Agency(s) | Recommended Actions(s) | Other Agencies/Orgs Involved | Projected Start Date | Projected Completion Date | Program Outcomes | Resources \$\$\$ |
|--|--|-------------------------------------|-----------------------------|----------------------------------|--|--------------------------|
| DBHDS | 5.1.5. Evaluate feasibility of long-term rental assistance program based on the outcome of demonstration/pilot project, if approved. | Interagency Housing Committee | 12/2013 | 6/2014 | Propose any necessary budget or legislative changes to implement | Existing State Resources |
| DBHDS | 5.1.6. Establish annual review and revision of strategies and action steps. | Interagency Housing Committee | | Annually in September | Annual Plan Complete | Existing DBHDS Resources |
| Strategy 5.2: Convene state and local partners to ensure implementation of plan | | | | | | |
| DBHDS | 5.2.1. DBHDS Commissioner to establish Interagency Housing Committee as Permanent Advisory Body. | Interagency Housing Committee | 5/2013 | 12/2013 | Committee Reconvened | |
| DBHDS | 5.2.2. Conduct outreach to representatives of agencies at the local level to share the Plan. | Interagency Housing Committee | 3/2013 | Ongoing | 100% of localities reached each year of the Plan | Existing DBHDS Resources |
| DBHDS | 5.2.3 Build, assess, and refine strategy for building local support for the Plan. | Interagency Housing Committee | 12/2013 | Ongoing | Strategy in place | Existing DBHDS Resources |

Terms and Acronyms

Terms

Affordable Housing - A general term applied to public- and private-sector efforts to help low- and moderate-income people purchase or lease housing. As defined by U. S. Department of Housing and Urban Development (HUD) , affordable housing means any housing accommodation for which a tenant household pays 30% or less of its income.

Home and Community Based Services Waivers - waivers approved by the Centers for Medicare and Medicaid Services for providing long-term care services in home and community settings rather than institutional settings to eligible individuals with developmental disabilities.

Housing Choice Voucher Program (HCVP)- federal government's major program for assisting very low-income families, the elderly, and the disabled to afford decent, safe, and sanitary housing in the private market. Since housing assistance is provided on behalf of the family or individual, participants are able to find their own housing, including single-family homes, townhouses and apartments.

Interagency Housing Committee – Committee formed by DBHDS and composed of representatives from the Office of the Secretary of Health and Human Resources, the Virginia Housing Development Authority, the Virginia Department of Housing and Community Development, the Virginia Department of Medical Assistance Services, the Virginia Department for Aging and Rehabilitative Services, and the Virginia Board for People with Disabilities, as well as stakeholder organizations.

Local Entitlement Communities/Jurisdictions – cities, counties and/or a consortium of cities and counties that get a direct allocation of funding from the HUD every year to support economic development and community-related activities.

Low Income Housing Tax Credit (LIHTC) - A congressionally-created tax credit (Internal Revenue Code Section 42) available to investors in low-income housing designed to encourage investment that helps finance construction and rehabilitation of housing for low-income renters.

Money Follows the Person (MFP) - In 2008, Virginia launched the Money Follows the Person (MFP) initiative to provide extra supports and services to Virginians who choose to transition from long-term institutions into the community.

Notice of Funding Availability - federal announcement indicating the availability of funding for certain activities and the process by which eligible applicants can access said funds.

Public Housing Agencies (PHAs) – agencies designated by HUD to administer HUD’s rent subsidy programs. In most cases, these agencies are Public Housing Authorities, but other public and non-profit agencies may also be designated by HUD to serve as PHAs.

Qualified Allocation Plan - Plan developed by state housing finance agencies detailing how it will administer and fund projects under the Low Income Housing Tax Credit program.

Section 811 Program - HUD program that provides funding to develop and subsidize rental housing with the availability of supportive services for very low- and extremely low-income adults with disabilities

Supplemental Security Income - is a United States government program that provides stipends to low-income people who are either aged (65 or older), blind, or disabled.

Universal Design Standards - a set of design features that enhance the usability and marketability of such units.

Waiver Design Advisory Committee (WDAC) - DBHDS-established advisory group that is convened to consider the recommendations made by HSRI, provide input on the new waiver design, and make suggestions regarding means of enhancing system processes. The WDAC is comprised of ID and DD self-advocates, family members, representatives from CSBs, provider agencies, advocacy groups, and parent groups from across the Commonwealth.

Acronyms

CIL- Center for Independent Living

CMS – Center for Medicaid and Medicare Services

CSB - Community Services Board

DARS – Department for Aging and Rehabilitative Services

DBHDS – Department of Behavioral Health and Developmental Services

DHCD – Department of Housing and Community Development

DMAS – Department of Medical Assistance Services

HCBS - Home and Community Based Services

HTF – Virginia’s Housing Trust Fund (managed by DHCD)

HSRI - Human Services Research Institute

HUD - U.S. Department of Housing and Urban Development

ICF – Intermediate Care Facility

I/DD – Intellectual Disability/Developmental Disability

LIHTC – Low Income Housing Tax Credit Program

MFP – Money Follows the Person

SILC – State Independent Living Council

SSI - Supplemental Security Income

SSDI - Social Security Disability Insurance

VACIL – Virginia Centers for Independent Living

VACSB – Virginia Association of Community Services Boards

VBPD – Virginia Board for People with Disabilities

VHDA - Virginia Housing Development Authority

VNPP – Virginia Network of Private Providers