Housing Specialist Role & Responsibilities Checklist

The Housing Specialist™ — Housing Made Possible

Practical onboarding and self-assessment tool. Print or complete electronically.

1. Core Responsibilities Checklist

Responsibility	I Understand (Y/N)	Notes / Training Needed
Conduct client housing assessments		
Develop individualized housing plans		
Prepare and organize housing documents		
Coordinate landlord and broker communication		
Submit complete housing packages		
Follow up on inspections and approvals		
Support lease signing and move-in		
Assist with housing stabilization		

2. Professional Boundaries & Referrals

What I can do as a Housing Specialist
- Explain general housing program information
- Help clients organize documents and prepare for appointments
- Coordinate communication with landlords and agencies

What requires another authority or referral
- Legal advice or representation
- Official eligibility determinations
- Medical or mental health assessments
- Direct payment of rent or financial assistance decisions

3. Professional Skills Self-Assessment

Skill Area	Rating (1–5)	Training Needed?
Client communication		
Documentation		
Landlord outreach		
Program knowledge		
Time management		
Professional boundaries		
Problem solving		
Follow-up and tracking		
Team collaboration		
Use of tools and technology		

4. First-Week Action Plan

Onboarding Activities

■ Review program guidelines and internal procedures
■ Meet with supervisor to clarify expectations
■ Shadow experienced colleagues
■ Review sample cases and documentation standards

Personal Commitments This Week

1. _____
2. _____

Supervisory Review Date: _____