THE HOUSING SPECIALIST™

Post-Placement Housing Stability & Follow-Up Toolkit

Support clients after move-in • Identify emerging problems early
Coordinate support and help prevent avoidable housing loss

Professional Resource #17 • 6 Pages • Fillable • Printable • Free
Housing Specialist Hub → Keeping Clients Housed

Client & Placement Information

Specialist Name: _____ **Date Opened:** _____

Organization: _____ **Client / Case ID:** _____

Property Address:
_____

Move-In Date: _____ **Program:** ■ CityFHEPS ■ FHEPS ■ Section 8 ■ Other

Landlord / Super Contact: _____ **Phone:** _____

1. Follow-Up Planning

Agree on communication preferences and responsibilities while the client is still settling in.

- ■ Preferred contact method confirmed with the client (phone / text / email / in-person)
- ■ Best days and times to reach the client recorded
- ■ Client knows how to reach the Housing Specialist for urgent issues
- ■ Client understands what the follow-up process will look like
- ■ Any language, accessibility or technology barriers noted and addressed
- ■ Aftercare or stabilization services (if available) introduced or referred
- ■ Case notes updated with the follow-up plan

2. Post-Move-In Checkpoints

Organize structured reviews at key intervals. Early contact is one of the strongest predictors of housing stability.

Recommended Checkpoint Schedule

Checkpoint	Target Window	Completed	Date	Notes
Early check-in	Day 3–7	■		
30-day review	Day 25–35	■		
60-day review	Day 55–65	■		
90-day review	Day 85–95	■		
Additional (program-required)	As required	■		

At Each Checkpoint, Ask About:

- ■ Is the client still living in the unit and able to access it?
- ■ Are rent payments (client portion and program portion) on track?
- ■ Are there any unresolved repair or utility problems?
- ■ Has the client received any notices from the landlord?
- ■ Are there new household, income or support needs?
- ■ Does the client feel safe and stable in the housing?

3. Housing Stability Assessment

Identify concerns involving rent, repairs, utilities, landlord relations and support needs.

Stability Domains

Domain	Status	Notes / Concerns
Rent payment (client portion)	■ OK ■ At risk ■ Problem	
Program payment / subsidy	■ OK ■ At risk ■ Problem	
Utilities (electric, gas, heat)	■ OK ■ At risk ■ Problem	
Repairs & maintenance	■ OK ■ At risk ■ Problem	
Landlord / building relations	■ OK ■ At risk ■ Problem	
Household composition changes	■ OK ■ At risk ■ Problem	
Income / benefits stability	■ OK ■ At risk ■ Problem	
Safety & security	■ OK ■ At risk ■ Problem	
Support network / aftercare	■ OK ■ At risk ■ Problem	

Overall stability judgment: ■ Stable ■ Watch closely ■ At risk — action needed

4. Early-Warning Action Plan

Respond to emerging problems promptly and coordinate the right referrals.

When a Concern Is Identified

- Document the concern factually in the authorized system
- Discuss the issue with the client and confirm their understanding
- Identify whether the issue is within the Housing Specialist's role or requires referral
- Contact the landlord (when appropriate and authorized) about repair or payment issues
- Refer to legal services if eviction notices or court papers are involved
- Refer to benefits / income supports if a payment problem is emerging
- Escalate to supervisor when the risk of housing loss is significant
- Set a clear follow-up date and record it

Action Plan Log

Concern	Action Taken	Referral / Owner	Follow-up

5. Reusable Follow-Up Contact Log

Record every contact, the outcome and the next review date. Consistent logging supports continuity and supervision.

Date	Method	Topics Discussed	Outcome / Action	Next Review

Method codes: P = Phone T = Text E = Email I = In-person V = Virtual

6. Professional Quality Review

Assess the effectiveness of follow-up and identify improvements for future cases.

Quality Questions

- Were the planned checkpoints completed on or near schedule?
- Were emerging problems identified early enough to allow meaningful action?
- Were referrals made promptly when issues exceeded the Housing Specialist's role?
- Was the client kept informed with accurate, non-speculative information?
- Were case notes clear enough for another staff member to continue the work?
- Was the landlord relationship managed professionally and within boundaries?
- Did the follow-up process help the client feel supported after move-in?

What worked well in this follow-up process:

_____

_____

What I will improve on the next placement:

_____

_____

Professional Safeguards

This toolkit is a working resource for Housing Specialists. It does not replace employer policies, official program rules or specialized legal advice.

• Follow-up after move-in is a critical part of housing placement — not an optional extra.
• Protect client confidentiality. Record sensitive information only in authorized systems.
• Do not attempt to provide legal representation or interpret court documents. Refer promptly.
• Escalate significant risks of housing loss through your organization's established channels.
• Early, consistent, respectful contact is one of the strongest tools for preventing housing loss.