



Retooling Transitional Housing *Checklist*

This checklist was developed by the National Alliance to End Homelessness to help transitional housing providers conceptualize and plan the retooling process. The checklist should be modified based on the circumstances in your community. For questions, comments, or to learn more, email Kay Moshier McDivitt at kmoshiermcdivitt@naeh.org or the Alliance's Center for Capacity Building at thecenter@naeh.org.

Phase I Assessment, Planning and Preparation (30-60 days)

Meet with your local Continuum of Care Planning Committee

It is critical that your retooling is in alignment with your community's Continuum of Care and Ten Year Plan. Your retooling plan should meet the most pressing needs in your community.

Develop the Retooling Assessment Committee

The retooling planning process should include stakeholders who are needed to move the process forward. Key participants in the assessment committee may include:

- Executive Director;
- Key Board Member(s);
- 1 to 2 Key Staff;
- Major Funder(s); and
- Community Ten Year Plan staff.

Assess and Evaluate the Current Program

Assess and evaluate current data and establish baseline data. Include information on what populations are currently being served, how long participants stay in the program, number and percentage of people who exit to permanent housing, and the length of time people typically stay in the program.

Identify Potential Models

The model may include rapid re-housing, emergency housing, or permanent housing. Take into consideration your community's needs, your target population, needed staffing configuration, new and different partnerships needed, and any merging options.

- Identify Barriers to Retooling*
 Identify barriers and potential solutions. Assess the level of commitment or potential resistance from key stakeholders including staff, board, funders, and important external stakeholders. Identify issues to be addressed including:
 - Funding sources;
 - Contract revisions;
 - Community buy in; and
 - Building use.

- Develop a Communication Strategy*
 Develop a plan to communicate the retooling plan with targeted stakeholders, including Continuum of Care leadership, local politicians, funders, board, staff, and local government.

- Produce Final Recommendation and Plan*
 Finalize recommendations for retooling and an implementation plan, including a roll out schedule.

Phase 2: Implementation (4-6 months)

- Identify a vision and core values that will drive the retooling and adoption of a new model.
- Develop an organizational structure for the new model that includes a program flow chart.
- Develop a plan to shift the organizational culture to adopt the new core values and vision. Identify what in the current culture will need to shift to adopt the philosophy of the new model.
- Identify staffing and training needs, including revised job descriptions. Develop a plan for ongoing staff communication and training; be prepared for staff turnover; allow opportunities for open dialogue.
- Update policies and managerial practices to accommodate the transition.
- Obtain Board support and endorsement. Identify who is on your board who supports this retooling and how you can use them to engage the rest of the board.
- Create an outcomes measurement plan that includes:
 - Outcomes and benchmarks to be achieved;
 - Quarterly or more frequent review of benchmarks;
 - Communicating results to funders, staff and board; and
 - Adjusting as needed to achieve outcomes.

- Develop a proposed budget. Identify the current funding sources that may need to be modified and points of contact for those sources. Identify potential sources of funding that may support the new model. (If the program is HUD funded, contact the field office regarding any contract amendments that may be necessary.)
- Identify community partnerships and outside resources that will be needed to support households. Develop model agreements (MOUs, linkage agreements, and subcontracts) to engage those partners.
- Develop a clear communication plan. Plan for internal communication to board and staff and external communication to the community and funders.
- If necessary, take steps to alter building use. Options can include using the building in the new model, selling the property and using proceeds for the new program, or using the building for other charitable purposes. Explore and resolve any funding constraints or local codes inhibiting selling the building or utilizing it for other purposes.

Phase 3: Start the Shift

Set the start date for implementation of the new model as well as contingency plans. Communicate the implementation date with the larger community. The start date may depend on funding and contracts and may happen in phases. It is important however, to begin transitioning to the new model and continue to adjust the model as you shift to full implementation.