

Client Name:

ClientTrack ID:

Case Manager Name:

Housing Plan Template:

Step 1: Identify - *Let's discuss your previous housing history and current situation.*

Where was the last place you stayed that was working out well?

What about that last place made it work well?

What happened to make that good situation end?

What types of housing have you had in the past (house, apartment, trailer, condo, RV, townhome, other)?

Did you have roommates/family living with you/living with them?

Did you support that housing through any of the following:

Type of Support:	Yes or No?	Notes:
Paying rent		
Paying partial rent		
Supplying groceries		
Paying bills		
Providing transportation		
Companionship		
Educational focus		
Animal Assistance		
Other		

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Do you prefer a specific type of housing for in the future? (Roommates, alone, house, apartment, trailer, RV, in the city, outside of city limits, etc.)

What are some barriers to housing you think you may have? List below.

Type of Barrier	Check Yes or No	Room to Expand on Barrier if Wanted:
No Previous Rental History		
Employment History		
Low or No Income		
Single Parent Household		
Larger Family (3+ children)		
Evictions on Record		
Criminal History		
Need Valid ID or License		
Limited English Proficiency		
Debt (housing related or personal life related)		
Child Support		
No High School Diploma/GED		

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No or Poor Credit History		
Length of Time Experiencing Homelessness		
Substance Use (Drug and Alcohol)		
Domestic Violence		
Knowledge Behind Process of Renting Needed		
Unresolved Legal Issues		
Other		

What are steps that we can take to resolve those barriers?

What are some strengths you can think of that you already possess in a housing process?

Example of Strengths	Check Yes or No	Room to Strength if Wanted:
Positive reference from previous landlord, employer, community member, case manager, etc.		

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Experience renting		
Positive partner experiences		
Work experience – either through skills learned or education gained		
Ability to develop rapport with landlord, neighbors, roommates, etc.		
Motivated to work or increase hours at existing job		
Currently receiving income either through employment or other means		
Support from family, friends, community network, etc.		
Completion of courses and/or certificates		
Problem solving experience		
Knowledge of navigating systems (services, healthcare, governmental, etc.)		
Other		

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What are some steps we can work on to build on your strengths you have?

What are some resources you already access?

Do you have a case manager you work with at any of those agencies?

What are some needs that you haven't been able to meet yet that I may be able to help you connect to?

Step 2: Short and Long Term Goals

What is one short term goals that I can help you work towards for the next 30-60 days? We are going to write it out as a SMART goal.

Specific	What exactly do you want to achieve? Good goals are clear and defined.	
Measurable	How will you know when you achieve it? Can you track progress with steps or daily, weekly, monthly?	

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Achievable	How can the goal be accomplished? List 3 steps towards accomplishing the goal.	1. 2. 3.
Relevant	Why is this goal important to you? Does this goal help add to your plans for your future?	
Time-Bound	When you want to achieve the goal? Set a target date that you can aim for.	

What is one long term goal that I can help you work towards for the next 90-120 days? We are going to write it out as a SMART goal.

Specific	What exactly do you want to achieve? Good goals are clear and defined.	
Measurable	How will you know when you achieve it? Can you track progress with steps or daily, weekly, monthly?	

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Achievable	How can the goal be accomplished? List 3 steps towards accomplishing the goal.	1. 2. 3.
Relevant	Why is this goal important to you? Does this goal help add to your plans for your future?	
Time-Bound	When you want to achieve the goal? Set a target date that you can aim for.	

Step 3: Next Steps

Besides working on the two defined goals what are some next steps that you think we should write down?