



GIFT VIII Leadership: Implementation Grant Executive Summary

During the last decade, community leaders, including the Community Foundation, have been collaborating to address housing insecurity. These efforts, along with motivated stakeholders and elected officials, position Monroe County to seize upon existing momentum and launch a catalytic effort to stabilize our unsheltered neighbors and those teetering on the precipice of housing insecurity.

While we have made significant progress, Monroe County has seen an alarming increase in housing-insecure households that is stretching community resources beyond capacity. The Community Foundation and its partners are focusing on an innovative solution that will not only help those experiencing homelessness in the short term but allow this community to better serve both those in crisis and those whose stability can be preserved if appropriate supports are provided. By reimaging traditional case management and implementing an innovative and team-based approach, complete with wrap-around supports and a “no wrong door” culture, we aim to reduce unsheltered homelessness by two-thirds during the course of this grant.

Additionally, this proposal seeks to go beyond the crisis of unsheltered homelessness by prioritizing diversion case management to prevent housing-insecure families and individuals from falling into homelessness in the first place. With creative methods such as individualized, strengths-based planning, strong partnerships with partner agencies, community-based volunteer support teams, and an innovative economic advancement income supplement, our objective is for more families to be diverted from homelessness and increase their overall financial stability.

We propose a five-year path to building a better solution to housing insecurity. Central to this solution is a team of skilled professionals who will be responsible for 1) diverting households from experiencing homelessness, 2) housing individuals experiencing unsheltered homelessness, 3) creating individualized case conferencing teams through diverse community partnerships, and 4) providing intensive case management to housing insecure households for a period of up to three years. As the immediate crisis is mitigated, case management supports for the unsheltered homeless are projected to taper beginning in year four. Diversion case management efforts will be sustained throughout the grant period and then beyond, with the addition of new funding streams and partnerships.

Heading Home of South Central Indiana, the entity established as an outcome of previous leadership work facilitated by the Community Foundation, will serve as the employer of the team of case management professionals and track progress towards proposed outcomes. Key community stakeholders, including South Central Housing Network, City of Bloomington, South Central Community Action Program, and Bloomington Health Foundation, are committed to this work and ready to align their efforts. The Community Foundation will provide leadership in developing and establishing strategies, convening, and securing sustainable funding.

Monroe County is poised for this opportunity to re-invent our approach to serving our neighbors experiencing homelessness.

GIFT VIII Leadership: Implementation Grant Narrative

Purpose and Rationale

Like many Indiana communities, Monroe County is faced with escalating challenges related to homelessness. However, years of strong community leadership position Monroe County to seize upon existing momentum and launch a catalytic effort to stabilize our unsheltered neighbors and those teetering on the precipice of housing insecurity.

Housing insecurity has been a critical area of community focus for many years. The Community Foundation of Bloomington and Monroe County (CFBMC) was a leader and a funder in a collaborative effort that produced the first “Heading Home” plan in 2013, published by the South Central Housing Network (SCHN). The COVID-19 crisis triggered a critical revisiting of the original plan by a cross-sector group of relevant stakeholders, including those with lived experience. This effort culminated in an updated plan entitled “The Heading Home Plan: A Regional Strategy for Making Homelessness Rare, Brief, and Non-repeating.” Its recommendations were grounded in an updated landscape analysis, a commitment to data-supported strategies, and research in promising practices. Perhaps most significantly, the plan called for the creation of a new community-based entity to coordinate strategies for strengthening housing security, decreasing homelessness, and deploying community resources for diversion and prevention. Four years later, that entity, Heading Home of South Central Indiana (Heading Home), has a staff of two and a board of directors populated by leaders representing local government (City of Bloomington, Monroe County, and local townships), housing (South Central Housing Network), and philanthropy (CFMBC and United Way of South Central Indiana).

Heading Home has made significant advancements in addressing systemic barriers to housing security. Of particular significance, Monroe County has become a Built for Zero community – the first in Indiana – utilizing a nationally recognized framework for helping communities achieve “functional zero” homelessness, tackling one specific population at a time. The first focus is the veteran population. Heading Home created a “case conference” team that talks across agencies to support homeless veterans in moving to housing security. Since beginning in January 2023, 32 veterans¹ have moved into housing and three additional veterans were diverted from a homeless shelter to a longer-term housing solution.

Key organizations on the Heading Home board have also worked intensely with local sheltering and social service agencies to collect data and information, enhancing Coordinated Entry Systems in the region and the ability to create data-driven solutions.

These developments have been instrumental in activating Monroe County’s commitment to measurably ending homelessness. However, the population of unsheltered and housing-insecure households has unfortunately grown by 217% since 2019. The unhoused population and encampments are growing across the community and have stretched community resources beyond capacity. Community climate is deteriorating as a result.

Now is the time to rethink a system that is overwhelmed, under-resourced, and often ineffective in addressing the breadth of needs that exist. While the community collaborates through city, county, and social service efforts to create the housing needed, case management is the barrier to reducing the rate of homelessness and increasing success rates. A 2023 National Institute of Health study² showed that intensive case management reduces the number of days someone is homeless, increases client well-being in a variety of categories, and improves long-term housing stability. In the current environment, the shortage of case

¹Current progress, like that occurring with veterans, and other key metrics are captured on Heading Home’s Data Dashboard, which provides data from the local Homeless Management Information System. See more at: <https://headinghomeindiana.org/data-dashboard/>

²Exploring the effect of case management in homelessness per components: A systematic review of effectiveness and implementation, with meta analysis and thematic synthesis, Weightman, Kelsen, Thomas, Mann, Searchfield, Willis, Hannigan, Smith, Cordiner, 2023.

management personnel coupled with unmanageable caseloads is constraining the county's ability to stabilize the ecosystem and adequately support those in crisis or nearing a crisis point. Stakeholders concur that a concentrated, time-bound initiative to reduce backlogs in case management would allow for more capacity to serve people in crisis. Many never receive services because of their position on the Vulnerability Index – Service Prioritization Decision Assistance Tool (VI-SPDAT), which prioritizes those in the most severe situations and, as a result, leaves those who could be diverted from crisis without housing. This proposal will help this community better serve those whose stability can be preserved and those in crisis.

Several community-based efforts will enrich our proposed implementation activities, including CFBMC's GIFT VIII planning grant, which is in process, to design "next-level" versions of enhanced case management, the Bloomington Health Foundation's new system of navigators for those experiencing mental health challenges and substance use disorders, and city leadership that is exploring a locally-based income supplement to serve people at or approaching the Asset Limited, Income Constrained, Employed (ALICE) threshold of financial survival.

Proposed Activities

To address the pressing housing instability crisis in Monroe County, we propose a partnership between local organizations to provide intensive housing case management to any individual/family experiencing unsheltered homelessness and diversion case management to any household experiencing significant housing instability. We will establish a "no wrong door" culture that allows community members impacted by housing crises to be served quickly through an innovative case management model that draws on the strengths of existing community partners from multiple social service agencies. Finally, we will assist households in achieving housing stability as quickly as possible, followed by up to three years of individualized case management to address underlying causes and ensure lasting stability.

To achieve these goals, we propose the creation of a team of skilled professionals who will be responsible for 1) diverting households from experiencing homelessness, 2) housing individuals experiencing unsheltered homelessness, 3) creating individualized case conferencing teams through diverse community partnerships, and 4) providing intensive case management to housing insecure households for a period of up to three years, according to the needs of the household.

The innovative team we propose will consist of one Project Lead, six Housing Case Managers, and five Diversion Case Managers. Each case manager will curate a skilled support team committed to addressing each individual or family's specific needs and personal goals, and case managers will follow clients until both the client and team feel confident that stability can be maintained. This skilled support team may include service providers, volunteers, family members, and faith community partners, and will work closely with the Bloomington Health Foundation's new mental health navigator program.

Unsheltered Homelessness Case Management

Each year, communities across the country complete a Point in Time (PIT) Count to understand the number of people experiencing homelessness on one night in late January. The local PIT Count is conducted in Monroe, Morgan, and Lawrence Counties, with most of the households experiencing homelessness in Monroe County. The following table represents the number of people experiencing unsheltered homelessness in Region 10, which includes Monroe County, over the past six years.

Unsheltered Homeless Count

	2019	2020	2021	2022	2023	2024
Region 10	29	36	69*	54*	69*	124**
Monroe County	29	36	55	44	51	92

* In 2021-2023, an unsheltered count was conducted in 2 counties.

** In 2024, the unsheltered count was conducted in 3 counties

As the table above indicates, the number of people experiencing unsheltered homelessness in Monroe County has more than tripled from 2019 to 2024, with the majority of that increase between 2023 and 2024. While Indiana overall has seen an increase in the number of unsheltered individuals, there has not been an equal increase in federal or state funding to address this problem. We see the number of people experiencing unsheltered homelessness in Monroe County as a public emergency.

Currently, our county is home to two adult shelters, one family shelter, and one domestic violence shelter. Each shelter has case managers who guide that agency’s clients through homelessness and into stability. A client exiting any of the shelters without housing or having never engaged with a shelter is unlikely to have consistent case management services. The typical model of crisis case management offers drop-in, one-time support. It does not provide ongoing support to address underlying causes of homelessness or work to prevent recurrences.

CFBMC and its partners propose an innovative strategy of targeted, long-term case management for anyone experiencing unsheltered homelessness, even if they are not experiencing chronic homelessness. In this way, we will be able to treat homelessness like the emergency it is, replacing one-time crisis case management with sustained support once individuals are housed and preventing a recurrence of homelessness. To achieve this, we will create a team of six Housing Case Managers tasked with reducing the number of people experiencing unsheltered homelessness in Monroe County by two-thirds over three years and maintaining that reduction. These case managers will be embedded in pairs in each of the three community organizations equipped to do street outreach work: our two adult shelters, Beacon and Wheeler Mission, and HealthNet, our street medicine team.

These case managers will identify people experiencing unsheltered homelessness and utilize a strengths-based, individualized, voluntary services model to help them achieve housing. These Housing Case Managers will partner with local service providers to access resources to achieve housing. They will also have access to client assistance funds designated for rapidly removing barriers to housing. If individuals do not wish to remain in Monroe County, Housing Case Managers may be able to access funds to allow individuals to reunify with friends or family members.

Once housed, case managers will continue to meet with clients at their host agencies and in their homes to identify likely barriers to ongoing stability. Case managers and clients will collaborate in the construction of a case management team of professionals and volunteers who can provide the resources necessary to create lasting stability. These partners may include people dedicated to housing, mental health care, physical health care, childcare, job training, employment, education, legal aid, and more. Meetings will continue according to individual household needs at decreasing intervals over a period of up to three years.

The team of Housing Case Managers will work at full capacity for an initial period of three years. In the following three years, the number of Housing Case Managers will be reduced with ongoing work on sustainability through diversion and outreach done by community partners. Over a period of five years, we anticipate a reduction in the number of people experiencing unsheltered homelessness and an increase in coordinated and collaborative community strategies.

Homelessness Diversion Case Management

According to 2021 data from Prosperity Indiana, 31% of Monroe County households at 50% of Area Median Income (AMI) are severely housing cost burdened (consistently spending 50% of their household income on housing). The number of severely cost-burdened households in Monroe County jumps dramatically to 82% when their income is at 30% AMI or less. Households experiencing housing instability may access assistance from many social service agencies and faith communities, but this support is likely to be limited to a one-time request for a relatively small amount of money to meet a one-time need. Our community has no organization dedicated to providing preventative case management to these families living on the brink of disaster. Creating a proactive solution to prevent people from becoming homeless will not only stabilize an at-risk population but also allow the capacity of the case managers and agencies to be focused on those with the most extreme needs.

We propose creating a team of five Diversion Case Managers to provide households at risk with comprehensive case management to stabilize housing and ensure lasting housing stability. These case managers will work closely with community partners, most likely to encounter people experiencing housing instability, to establish relationships with those at risk of a severe housing crisis.

For this project, we identify the target demographic as households that 1) are consistently spending more than 50% of their household income on housing, 2) have missed two or more rent or mortgage payments in the past 12 months, 3) have missed one rent or mortgage payment in the past 12 months and have experienced a major life event likely to cause further delinquent payments, and 4) are at imminent risk of losing current housing.

Once these households are identified, case managers will work with them to identify barriers to housing security and build an individualized, strengths-based success plan based on each family's goals. Using this plan as a map, case managers will convene a case management team to support the household on their path to housing security. Diversion Case Managers will work collaboratively with other support agencies and will also have access to funds designated for the removal of barriers that aren't easily or quickly eliminated through other channels. We envision case management will be frequent and intensive when a family is identified and will gradually taper off over a period of up to three years. In these cases, specifically, we envision welcoming community members into a partnership to support families with rides to appointments, mentorship, and friendship. These volunteers will become an integral part of the support team for these households.

Additionally, we propose a small pilot to provide a limited number of families (25 in year one, 50 in year two, and 60 in years three to five) with an economic advancement income supplement. This supplement will target ALICE families who have experienced housing instability in Monroe County. In order to receive the supplement, families will be required to participate in diversion case management for a period of three years.

Roles and Responsibilities

The Community Foundation will deploy funds, provide fiscal oversight for the GIFT VIII grant funds, and serve as a convener for broader stakeholder groups. Heading Home will lead in executing this project and provide accountability for its outcomes. CFBMC has a leadership position on Heading Home's Board, with CFBMC's President and CEO serving as co-chair. This board will provide oversight and programmatic guidance on this initiative. Additionally, CFBMC may deploy funding from other sources to ancillary organizations that support individuals and families facing challenges that impact housing stability.

Housing Case Managers, Diversion Case Managers, and their supervisors will be employees of Heading Home, forming a cohort that will meet weekly to conduct case conferencing, discuss best practices, provide training, set cultural norms and assess progress in attaining measurable goals of moving residents into housing and in diverting people from homelessness.

Heading Home Housing and Diversion Case Managers will be embedded within eight community partner organizations throughout Monroe County. Each partner will be responsible for providing office space, daily supervision, and coordination with other staff in their organization. The specific details of these responsibilities will be developed in collaboration with Heading Home.

Partners for six Housing Case Managers (2 FTEs per agency) include:

- Wheeler Mission: Monroe County's men's emergency shelter
- Beacon Inc.: Monroe County's emergency shelter for women and LGBTQ+ residents and the only adult shelter for people of any gender that is not faith-based
- HealthNet's Homeless Initiative Program: Bloomington's only street medicine outreach program

Diversion Case Managers will be hosted at partner organizations as follows:

- South Central Community Action Program (1 FTE): Our CAP agency provides a range of services for low-income families, including the administration of a Housing Choice Voucher program. The HH Diversion Case Manager will spend half their time on diversion case management and half administering housing stability income supplements.
- New Hope for Families (.5 FTE): Monroe County's only family emergency shelter
- Monroe County Public Library (1 FTE): The HH Diversion Case Manager will share time among three library branches serving downtown Bloomington, Ellettsville and the southwest sector of Monroe County.
- Perry Township Trustee (1 FTE): The most urban of Monroe County townships (population ~54,000) and the front line for providing many types of financial assistance for housing stability. The HH Diversion Case Manager embedded with Perry Township will be responsible for outreach to the five southern townships in Monroe County.
- Bloomington Township Trustee (1 FTE): The second-most urban of Monroe County's townships (population ~43,000) provides services that include a food pantry and its representative payee program, which helps residents who are unable to manage their financial decisions for social security, disability, or other benefits. The HH Diversion Case Manager embedded with Bloomington Township will be responsible for outreach to the four northern townships in Monroe County.
- Beacon, Inc. (.5 FTE): Shalom Community Center is a day center for people experiencing extreme poverty.

Heading Home will lead in the recruitment of community partners to support collaborative case management with the end goal of achieving lasting stability. In addition to volunteers from local faith and philanthropic groups, partnering closely with existing service providers and the Bloomington Health Foundation's new health navigator program, will ensure alignment of efforts.

Proposed Outcomes

Our key outcome is to reduce the number of people experiencing unsheltered homelessness by two-thirds over three years. For housing case management, the Community Foundation and partners will track the number of unsheltered homeless who engage in emergency case management and those who become housed. The percentage reduction in unsheltered homeless and of previously unsheltered homeless who retain housing will also serve as important performance indicators.

For diversion case management, important data indicators will include the number of households who engage in diversion case management, the number of households who are diverted from homelessness, the percentage of households who remain housed for three years, the percentage of households that increase income or assets while engaged in case management, and the percentage of households that access a new service to assist in housing stability.

Sustainability

This five-year project proposes to provide intensive case management and diversion for three years to significantly reduce the number of unhoused and housing-insecure residents during this period. During the final two years, the number of Housing Case Managers will be scaled back to reflect decreased need. Diversion case management will continue for the entire grant period. CFBMC will work with others during the grant period to secure sustainable funding, including growing a Housing Security Endowment Fund to support ongoing Heading Home operations. The goal of these efforts will be to fully sustain the Diversion Case Manager expenses after the GIFT VIII implementation grant is expended. After year five, Heading Home will also provide ongoing support for training, case conferencing and outcome assessment.

Risk and Mitigation Strategies

The Monroe County housing market remains highly unpredictable. Any changes that impact housing insecurity, including the continued escalation of housing costs, could affect the ability of this effort to adequately address our community's needs. Heading Home will monitor conditions closely and adjust case management and diversion work to respond to shifts in the the housing market as necessary.

There is also uncertainty related to co-existing risk factors. These include substance use disorders, mental and physical health challenges, and changes to the local labor market. The success of addressing these factors relies on our efforts to partner with organizations that deal directly with these conditions, including harm-reduction agencies, rehab centers, mental health providers, health care providers and economic development entities. CFBMC and Heading Home currently have strong ties in these areas and will continue cultivating relationships to mitigate risk factors contributing to housing insecurity.

Another risk factor is the challenge of building trust with unsheltered residents and housing-insecure people. Without their buy-in for case management, the type of intensive, long-term support we envision will be difficult to sustain. Our approach addresses this by embedding case managers within established agencies with a proven track record of working with unhoused/ housing-insecure individuals and training the case management cohort on best practices for this kind of relationship building.

Our proposed approach to diversion work is new and relies on identifying households experiencing housing instability but not yet in an acute crisis. A potential risk is that we are unable to reach this population in time to divert them from a housing crisis. Heading Home will monitor the number of people that diversion case managers are reaching and, if necessary, adjust where the case managers are embedded and/or how they conduct outreach. Building additional partnerships will also be crucial to help identify households in need of diversion. These partners include Monroe County's two public school systems and food pantries that serve families in poverty, among others.

GIFT VIII Leadership: Implementation Grant Timeline

Grant Period	Activity Description	Q1	Q2	Q3	Q4
Pre-Work (2024)	Develop job descriptions for the Project Lead, Housing Case Managers, and Diversion Case Managers				
	Establish a guiding team comprised of the initiative leadership and essential stakeholders				
	Convene housing partner agencies who will have Housing Case Managers embedded in their organizations				
	Develop Housing Stability Income Supplement (HSIS) eligibility criteria				
	Develop marketing materials for Diversion Case Management				
	Conclude Lilly Endowment GIFT VIII Planning work and identify next-level solutions for addressing street homelessness				
Grant Period	Activity Description	Q1	Q2	Q3	Q4
Year One	Hire staff and complete any needed training				
	Purchase equipment / technology / infrastructure set-up				
	Convene diversion partner agencies and other social service partners (school districts, faith organizations, etc.)				
	Activate unsheltered homelessness case management				
	Activate Diversion case management				

Year One	Recruit volunteers and conduct training for diversion case management initiative				
	Identify HSIS candidates and activate qualification process				
	Identify next subpopulation for Built for Zero and integrate into Housing Case Management				
	Initiate silent phase of the CFBMC Housing Security Endowment Campaign and match				
	Conduct first-year evaluation and determine adjustments to initiatives as needed				
Grant Period	Activity Description	Q1	Q2	Q3	Q4
Year Two	Conduct unsheltered homelessness case management				
	Conduct diversion case management				
	Recruit volunteers and conduct training for diversion case management initiative				
	Identify HSIS candidates and activate qualification process				
	Conduct annual professional development and training				
	Evaluate, refine, determine adjustments to initiatives as needed				
	Initiates public phase of Housing Security Endowment Campaign and match				
	Identify and cultivate partners for additional sustainability funding				

Grant Period	Activity Description	Q1	Q2	Q3	Q4
Year Three	Conduct unsheltered homelessness case management				
	Conduct diversion case management				
	Recruit volunteers and conduct training for diversion case management initiative				
	Identify HSIS candidates and activate qualification process				
	Conduct annual professional development and training				
	Evaluate, refine, determine adjustments to initiatives as needed				
	Continue public phase of Housing Security Endowment Campaign and match				
	Identify and cultivate partners for additional sustainability funding				
Grant Period	Activity Description	Q1	Q2	Q3	Q4
Year Four	Conduct unsheltered homelessness case management				
	Begin tapering of unsheltered homelessness case management down to 50% with the lessening of the caseload backlog				
	Conduct diversion case management				
	Recruit volunteers and conduct training for diversion case management initiative				
	Identify HSIS candidates and activate qualification process				
	Conduct annual professional development and training				
	Evaluate, refine, determine adjustments to initiatives as needed				

Year Four	Continue public phase of Housing Security Endowment Campaign and match				
	Identify and cultivate partners for additional sustainability funding				
Grant Period	Activity Description	Q1	Q2	Q3	Q4
Year Five	Continues 50% of unsheltered housing case management				
	Taper down unsheltered housing case management to 1 FTE				
	Continue diversion case management				
	Recruit volunteers and conduct training for diversion case management initiative				
	Identify HSIS candidates and activate qualification process				
	Conduct annual professional development and training				
	Evaluate, refine, determine adjustments to initiatives as needed				
	Continue public phase of Housing Security Endowment Campaign and match				
	Identify and cultivate partners for additional sustainability funding				

Lilly Endowment GIFT VIII Implementation Grant Budget

Grant Element	2025	2026	2027	2028	2029	Notes
Project Leader	\$66,000	\$68,640	\$71,386	\$74,241	\$77,211	1
Housing Case Managers	\$342,000	\$355,680	\$373,464	\$196,069	\$68,624	2
Diversion Case Managers	\$285,000	\$296,400	\$311,220	\$326,781	\$343,120	3
Reunification Fund	\$35,000	\$25,000	\$15,000	\$10,000	\$10,000	4
Housing Stability Funds	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	5
Rehousing Funds	\$150,000	\$150,000	\$75,000	\$50,000	\$50,000	6
Housing Stability Income Supplement (HSIS)	\$112,500	\$300,000	\$360,000	\$360,000	\$360,000	7
HSIS Administration	\$4,500	\$12,000	\$14,400	\$14,400	\$14,400	8
Equipment and Technology	\$10,000	\$1,500	\$1,500	\$1,500	\$1,500	9
Office Space	\$18,000	\$18,000	\$18,000	\$18,000	\$18,000	10
Program Supplies	\$12,000	\$12,000	\$12,000	\$9,000	\$7,000	11
Professional Development	\$5,500	\$5,500	\$5,500	\$4,000	\$3,000	12
Case Conferencing Expenses	\$12,000	\$12,000	\$12,000	\$9,000	\$7,000	13
Sustainability Endowment Matching Funds	\$175,000	\$175,000	\$175,000	\$175,000	\$175,000	14
<i>Subtotal</i>	<i>\$1,327,500</i>	<i>\$1,531,720</i>	<i>\$1,544,470</i>	<i>\$1,347,991</i>	<i>\$1,234,855</i>	
CFBMC Admin Fee (6% fee)	\$79,650	\$91,903	\$92,668	\$80,879	\$74,091	15
Total per year	\$1,407,150	\$1,623,623	\$1,637,138	\$1,428,870	\$1,308,946	
GRAND TOTAL	\$7,405,727					

GIFT VIII Implementation Grant Budget Narrative

The following narrative details the assumptions that serve as the basis for the GIFT VIII Implementation Grant Budget. Note numbers reference line items on the GIFT VIII Implementation Grant Budget.

Note #1: Project Lead

The Project Lead will coordinate and oversee the cohorts of Housing Case Managers and Diversion Case Managers. The person in this position will lead case management efforts and work closely with partner agencies to ensure that case managers effectively address client needs. The Project Lead will provide support and training to case managers, track program outcomes, and assess the effectiveness of case management work.

This position is budgeted at a starting salary of \$55,000 plus benefits for a total of \$66,000 in year one, with a 4% increase in each of the following years.

Note #2: Housing Case Managers

Housing Case Managers (6) will utilize a strengths-based, individualized, voluntary services model to help individuals/families achieve housing. Each will work across the ecosystem and in coordination with their peers to develop the relationships and protocols necessary to identify individuals experiencing homelessness. They will work at full capacity for three years with a goal to decrease the number of individuals experiencing unsheltered homelessness by two-thirds. In the following two years, we will reduce the number of Housing Case Managers to reflect the decreased need.

In year one, six (6) positions are budgeted at starting salaries of \$47,500 plus benefits for a total of \$57,000 per position in year one (\$342,000). The budget includes a 4% increase in each of the following two years. For the final two years of the grant, it is anticipated the program's success will decrease the need for case managers. In the budget, Housing Case Managers are stepped down to three (3) in year four and one (1) in year five.

Note #3: Diversion Case Managers

A team of five (5) Diversion Case Managers will work to identify households in crisis and at risk for housing insecurity. They will provide comprehensive case management to stabilize housing and ensure sufficient supports to create lasting housing stability. These case managers will be embedded with community partner organizations that are likely to encounter individuals and families experiencing housing instability, including township trustees, the Monroe County Public Library, the family emergency shelter, and the South Central Community Action Program.

After housing-insecure households are identified, case managers will work with them to identify barriers to housing security and build an individualized, strengths-based success plan based on each family's goals. Using this plan as a map, case managers will be part of a case conferencing team to support the individual/family progress on their path to housing security.

These five positions are budgeted at starting salaries of \$47,500 plus benefits for a total of \$57,000 per position in year one (\$285,000). The budget reflects a 4% increase in each of the following years.

The Diversion Case Manager at the South Central Community Action Program will work half-time on diversion case management and half-time administering Housing Stability Income Supplement (HSIS) funds.

Note #4: Reunification Fund

In instances when an unhoused individual chooses not to remain in Monroe County, Housing Case Managers may access funds to allow them to reunify with friends or family members in other communities. These funds could cover the cost of bus tickets, gas, or other travel expenses. After year one, as our coordinated approach to addressing housing security is implemented, we anticipate a decreased need for these funds in each subsequent year of the grant.

Note #5: Housing Stability Funds

As part of a proactive solution to prevent at-risk households from becoming homeless, Diversion Case Managers will have access to funds designated for the removal of barriers that aren't easily or quickly eliminated through other channels. Barriers might include health crises, transportation, childcare, change in household status (birth of a child, eldercare, etc.), job loss, and education.

Note #6: Rehousing Funds

To assist unhoused individuals and families as they move into housing, funds will be deployed by Housing Case Managers to pay for apartment application fees, security deposits, and other needs.

This budget calls for \$150,000 in years one and two, when it is anticipated the greatest need will exist. As our coordinated approach is implemented and fewer residents remain unhoused, the need for rehousing funds will decrease. The budget steps down to \$75,000 in year three and \$50,000 in each of the following two years.

Note #7: Housing Stability Income Supplement

We are proposing a small pilot to provide a Housing Stability Income Supplement (HSIS) to a limited number of families. This supplement will target ALICE families in Monroe County experiencing housing instability but not homelessness. In year one, 25 families will each receive a \$3,000 supplement over six months (\$75,000 total). This amount in year one accounts for a partial year of implementation, with qualification and family recruitment taking place in the first part of the year. In year two, 50 families will receive a \$6,000 supplement over 12 months (\$300,000). By year three, the total number of families receiving the supplement will reach 60 (\$360,000). Those same families will continue to receive HSIS through year five. If the pilot proves successful, a sustainable source of funds for the HSIS will be sought.

Families will be required to participate in case management to receive the supplement. The funds will be administered by the South Central Community Action Program, which will track outcomes for each family while receiving the supplement. Outcomes include not missing rent or mortgage payments over the supplement period as well as increased income, effective income, or assets while engaged in case management.

Note #8: HSIS Administration

To administer the Housing Stability Income Supplement, the South Central Community Action Program will receive an administration fee of 4% of the budgeted annual project expense.

Note #9: Equipment & Technology

The Project Lead and 11 case managers will each require laptops, software, cell phones, printers/scanners, and other equipment necessary to do their jobs in a responsive way to meet client needs. The budget reflects an upfront investment of \$10,000 with \$1,500 in expenses for each of the following four years.

Note #10: Office Space

Although the Housing and Diversion Case Managers will be embedded with partner organizations, the Project Lead will need office space. Conference space will also be required for meetings with case managers, partner organizations, and Heading Home staff.

Note #11: Program Supplies

Program supplies for the 11 case managers and Project Lead will cover materials necessary to perform their jobs, including notebooks, printer paper & toner, binders, and other supplies.

Expenses for program supplies will be stepped down in years four and five as the number of Housing Case Managers is anticipated to be reduced.

Note #12: Professional Development

A key component of this project involves building a cohort of case managers who have a shared understanding of best practices in the field of housing insecurity. Attendance at Built for Zero in-person conferences and other opportunities will ensure that this cohort receives adequate training to respond effectively to the housing needs of individuals and families.

As the number of Housing Case Managers declines, professional development expenses will decrease in years four and five.

Note #13: Case Conferencing Expenses

Collaborative case management forms the foundation of this work to strengthen housing security. Case conferencing expenses are intended to include any expenses related to convening the appropriate team to support households. Other expenses related to volunteers may be included as well, such as training, recruitment, and mileage or auto insurance reimbursements for transporting clients to appointments. These expenses will be stepped down in years four and five as the number of Housing Case Managers will be reduced.

Note #14: Sustainability Endowment Matching Funds

The Community Foundation is growing a Housing Security Endowment Fund. With existing funds and a significant lead gift from the county, the endowment currently sits at just over \$1.3 million. The goal is to grow this fund to at least \$4 million to provide a sufficient annual distribution to sustain Heading Home's operations. Included in the budget is a request for \$875,000 that CFBMC would utilize as matching funds to allow for expedited growth of the endowment in the near term. As CFBMC concludes its GIFT VIII Matching Campaign, it will focus on fundraising for the Housing Security Endowment. This endowment would provide sustaining support for grant activities beyond year five. CFBMC anticipates offering a \$1 match for each \$1 donated. This line constitutes \$875,000, or 11.75% of the total funding request.

Note # 15: CFBMC Admin Fee

Six percent of the total grant is budgeted for CFBMC's staffing, programmatic, and administrative costs for grant administration and reporting expenses. As mentioned in the cover

letter, the Foundation will bring critical leaders and partners to the table, marshal the resources of our sister organizations like CDFI Friendly Bloomington and ROI to help, support ancillary organizations, develop capabilities complementary to new programming, sustain a guiding team for the length of the project, and manage grant dollars effectively. Key members of our team will play a role, including the President and CEO, Development Director/COO, Controller, and Program staff.