

# Newcomer Housing Stability Planning Toolkit

**Strategies for Finding Secure and  
Sustainable Housing**



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## Strategies for Finding Secure and Sustainable Housing

Housing stability is a crucial aspect of refugee resettlement. Resettlement agencies and case managers play a vital role in supporting newcomers to find secure and sustainable housing to help rebuild their lives and thrive in new communities. This toolkit is designed to equip resettlement agency professionals with the essential knowledge and skills needed to navigate the housing market and provide effective support to newcomer clients.

### Housing Needs Assessment

Establishing a Housing Needs Assessment can be a great way to understand your clients' needs and address potential barriers to stable and secure housing. Case managers for newcomers are often the first points of contact in their housing journey, so it is important to implement strategies and tools to promote stable and secure housing.

Understanding the complexities of the housing landscape, and the challenges refugees face, is fundamental to offering targeted and culturally sensitive assistance. Establishing a Housing Needs Assessment can complement your existing client relationship with innovative solutions that foster inclusivity, affordability, and stability for refugee families.

The **Housing Needs Assessment** is a questionnaire or checklist used to assess the specific housing needs of newcomers. This can include preferences for location, size of accommodation, and accessibility features. Once the intake process is complete, the case manager can use this information to guide the housing hunt, identifying barriers and resources and compiling an actionable, time-bounded housing stability strategy.

A **Housing Needs Assessment** is a questionnaire or checklist used to assess the specific housing needs of newcomers. This can include preferences for location, size of accommodation, and accessibility features.

The assessment should be used to focus on interventions to address specific housing barriers. It should be a live document that is revisited and revised as priorities and barriers are identified, mitigated, or resolved.

### Client-Provider Meetings



Existing client-provider meetings can highlight opportunities and challenges in finding housing for your clients. Housing Needs Assessment intake forms can help guide the conversation to address barriers.

## Sample Housing Needs Assessment Intake Form

Date Information is Gathered: \_\_\_\_\_

Applicant Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ Case Number: \_\_\_\_\_

What is applicant's primary language? \_\_\_\_\_ Secondary language, if applicable? \_\_\_\_\_

Translation Assistance Needed  Yes  No  Client doesn't know  Client prefers not to answer

If yes, preferred language: \_\_\_\_\_

Enter family members that may live with the applicant:

Name	Relationship to Applicant	Date of Birth

Do you or anyone in the household need any reasonable accommodations?

Yes  No  Client doesn't know  Client prefers not to answer

If Yes, services needed: \_\_\_\_\_

Does the client require transportation, especially on public transportation lines, based on their housing location?

Yes  No

If Yes, services needed: \_\_\_\_\_

Identify any service needs of the immediate family members: \_\_\_\_\_

Is applicant receiving a housing subsidy?  Yes  No

If yes, what type of housing subsidy is applicant receiving? \_\_\_\_\_

Is client currently housed?  Yes  No

Is client listed on a lease agreement?  Yes  No

Rent amount: \$ \_\_\_\_\_ Rent amount client is responsible for: \$ \_\_\_\_\_

Does applicant or anyone living with him/her (perhaps just say "them"?) have a source of income?

Yes  No

What is the source of income? \_\_\_\_\_

Location preference/priority:

Accommodation size (i.e. number of rooms needed): \_\_\_\_\_

Additional Notes: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_



## Managing Housing Expectations

As a case manager, managing housing expectations and navigating cultural orientation are crucial to settling newcomers into their new homes. By establishing realistic expectations of the resettlement process, including the housing search, newcomers will experience greater clarity and fewer frustrations or disappointments.

During intake, it is important to discuss permanent and long-term housing as the goal. This should include explaining housing protocols and processes. Housing plans should cover how goals and actions will be set, the frequency of meetings, and approaches to monitoring progress. This proactive measure helps manage expectations and create steps towards self-sufficiency and successful outcomes.

The **Sample Expectation Setting Guide** is a tool for establishing mutual understanding of the housing search process. The tool helps set expectations—newcomers will see a limited amount of housing options that meet safety and affordability guidelines. The intention is to prevent exhaustive housing searches and create realistic expectations of housing in the U.S.

### Important Facts about Housing

Find additional guidance in Refugee Housing Solutions' blog [Managing Newcomers' Housing Expectations](#).

### Navigating Conversations & Cultural Orientation



The [Cultural Orientation Resource Exchange](#) is also a great tool to help navigate difficult conversations and manage expectations.

## Sample Expectation Setting Guide

### Client Acknowledgement of Housing Protocols

Case Number: \_\_\_\_\_

PA: \_\_\_\_\_

[Affiliate office] is a resettlement agency contracted by the U.S. government. In accordance with the R&P, resettlement agencies are charged with ensuring the following:

- Newcomer is placed in a safe, decent, and affordable dwelling to the best of our ability.
- Dwelling is a furnished living quarter.

As a resettlement agency serving many clients, [affiliate office] is only able to show clients enrolled in the R&P up to [insert number] housing options, in order to offer all clients enrolled in these programs equitable housing and complete core services within the required time limit.

- I, \_\_\_\_\_, and my family understand that [affiliate office] will procure or has already procured housing within the standards of both the Co-operative Agreement with the U.S. government and local and federal law. In order to serve all clients equally, [affiliate office] can show only up to [insert number] of housing options.
- I understand that if I reject one housing option, that option may not be available to me again.
- I also understand that if I reject all [insert number] housing options, I am responsible to find my own housing.
- Other (please specify):  
\_\_\_\_\_

I, [client name], acknowledge that my rights and responsibilities and R&P service expectations, laid out in this Expectation Setting Guide, were explained to me in a language that I understand. By signing this document, I agree to the terms of the housing protocols.

PA Name: \_\_\_\_\_ Signature: \_\_\_\_\_  
Date: \_\_\_\_\_

Spouse: \_\_\_\_\_ Signature: \_\_\_\_\_  
Date: \_\_\_\_\_

Caseworker: \_\_\_\_\_ Signature: \_\_\_\_\_  
Date: \_\_\_\_\_

Interpreter: \_\_\_\_\_ Signature: \_\_\_\_\_  
Date: \_\_\_\_\_

## Creating and Setting Housing Support Goals

Housing goal-setting should include both short- and long-term objectives, each broken down into achievable steps to be completed between meetings. These action steps ought to be clear, measurable, and capable of being accomplished within short periods of time. Common examples of short-term goals include securing immediate, temporary shelter and requesting support from integration services. Common examples of long-term goals include securing lease agreements of 12 or more months and accessing local jobs and education.

The **Assistance Priority and Response Matrix Sample** provides refugee service providers a quick glance at what housing agencies look for when assessing the immediacy with which a newcomer client needs housing support, as defined by the U.S. Department for Housing and Urban Development (HUD).

Housing support goals, such as the following examples, can be added to the housing intervention column to address both short- and long-term barriers for newcomers.

- **Stable Housing:** Provide a secure place that meets basic needs with a minimum 12-month lease agreement.
- **Community Integration:** Connect families with local housing services and resources.
- **School Enrollment:** Ensure children are enrolled in suitable educational programs near their residence.
- **Employment Assistance:** Help adults find suitable employment for self-sufficiency.
- **Language Skills:** Offer resources for communication and integration.
- **Cultural Orientation:** Provide guidance on local customs for better adaptation.
- **Legal Assistance:** Aid with essential legal documentation.
- **Social Support:** Link families with networks to reduce isolation.
- **Long-Term Stability:** Assist in planning for independence and integration, considering their housing goals and needs for the next 1-5 years.

## Assistance Priority and Response Matrix Sample

Check	Priority Level	Housing Status	Housing Intervention
	1	<b>Literally Homeless</b> Not housed and needs immediate assistance to obtain and maintain housing	<b>Short-Term:</b> <b>Long-Term:</b>
	2	<b>Imminent Risk of Homelessness</b> Needs immediate assistance to obtain and maintain housing	<b>Short-Term:</b> <b>Long-Term:</b>
	4	<b>Precariously Housed</b> Needs immediate assistance	<b>Short-Term:</b> <b>Long-Term:</b>
	5	<b>Unstable Housing</b> Immediate housing needs met; needs assistance to obtain and maintain housing	<b>Short-Term:</b> <b>Long-Term:</b>
	6	<b>Stable Housing</b> Immediate housing needs met; needs assistance to reduce risk or maintain housing	<b>Short-Term:</b> <b>Long-Term:</b>

## Financial Education and Budgeting Support

Apart from direct financial assistance, housing support may include financial education and budgeting support. Empowering refugee families with financial skills and knowledge can increase self-sufficiency and enable them to manage their housing expenses effectively through informed decisions. Below are some suggestions for offering financial education and budgeting support:

- Demonstrate how to develop a budget.
- Discuss how to manage housing finances effectively.
- Empower newcomers with financial literacy education.
- Enhance newcomer self-sufficiency to make informed decisions.

Financial education and budgeting contribute to housing stability, which, in turn, enhances newcomers' ability to integrate into their new communities. Financial confidence can allow families to focus on other aspects of integration, such as employment, education, and community engagement. One valuable resource is the [FDIC Money Smart curriculum](#), offering modules on budgeting and housing decisions. It's free of charge, and free of copyright, with translations available. Another is the [Low Income Home Energy Assistance Program \(LIHEAP\)](#) for budget assistance, teaching clients how to apply for support. For other educational resources, some [HUD-approved housing counseling agencies](#) offer low- or no-cost rental housing counseling.

## Sample Budgeting Worksheet

### Monthly Income:

- Total Employment Income: \$\_\_\_\_\_
- Government Assistance (e.g., refugee benefits, cash assistance): \$\_\_\_\_\_
- Other Income (e.g., child support, alimony): \$\_\_\_\_\_

Total Monthly Income: \$\_\_\_\_\_

### Housing:

- Rent/Mortgage: \$\_\_\_\_\_
- Utilities (electricity, water, gas): \$\_\_\_\_\_
- Renters Insurance: \$\_\_\_\_\_

Total Housing Expenses: \$\_\_\_\_\_

### Food:

- Groceries: \$\_\_\_\_\_
- Dining Out: \$\_\_\_\_\_

Total Food Expenses: \$\_\_\_\_\_

### Transportation:

- Car Payments: \$\_\_\_\_\_
- Gasoline/Public Transportation: \$\_\_\_\_\_
- Car Insurance: \$\_\_\_\_\_
- Maintenance and Repairs: \$\_\_\_\_\_

Total Transportation Expenses: \$\_\_\_\_\_

### Healthcare (if applicable):

- Health Insurance Premiums: \$\_\_\_\_\_
- Medical Expenses (co-pays, prescriptions, etc.): \$\_\_\_\_\_

Total Healthcare Expenses: \$\_\_\_\_\_

### Education (if applicable):

- School Fees/Tuition/Supplies/Tutoring: \$\_\_\_\_\_

Total Education Expenses: \$\_\_\_\_\_

### Childcare (if applicable):

- Daycare/Preschool: \$\_\_\_\_\_
- Babysitting: \$\_\_\_\_\_

Total Childcare Expenses: \$\_\_\_\_\_

### Personal & Household:

- Phone (Cell/Landline): \$\_\_\_\_\_
- Clothing: \$\_\_\_\_\_
- Toiletries/Household Supplies: \$\_\_\_\_\_

Total Personal & Household Expenses: \$\_\_\_\_\_

### Debt Payments:

- Credit Card Payments: \$\_\_\_\_\_
- Personal Loans: \$\_\_\_\_\_
- Other Debts: \$\_\_\_\_\_

Total Debt Payments: \$\_\_\_\_\_

### Savings:

- Emergency Fund: \$\_\_\_\_\_
- Retirement Savings: \$\_\_\_\_\_
- Other Savings Goals: \$\_\_\_\_\_

Total Savings Contributions: \$\_\_\_\_\_

**Total Monthly Expenses: \$\_\_\_\_\_**

**Net Income (Income minus Expenses): \$\_\_\_\_\_**



## Measurements for Long-Term Housing Success and Stability

To understand housing stability, it is important to consider best practices and key measurements in long-term housing. Successful outcomes are measurable based on family strengths and challenges; present and future housing barriers; community engagement and resource utilization; and established, documented income and credit. Some examples of relevant strengths and challenges are listed below.

Strengths	Challenges
<ul style="list-style-type: none"> <li>■ Compelling personal story</li> <li>■ Support from family, faith-based organizations, or other community networks</li> <li>■ Some limited English proficiency</li> </ul>	<ul style="list-style-type: none"> <li>■ No rental or credit history</li> <li>■ Larger family (3+ children)</li> <li>■ Lack of valid ID</li> <li>■ Lack of tenancy knowledge</li> <li>■ Unresolved immigration issues</li> </ul>

A case manager can identify indicators of housing stability to monitor progress in newcomers. Below are some indicators of housing stability to monitor.

- **Consistent, on-time rent payments** are an indicator of stable income.
- **No lease violations** reflect an understanding of the lease terms and the role of a tenant.
- **No new housing challenges** indicate ongoing stability and ability to retain housing without risk of eviction or homelessness.
- **Engagement with community resources** reinforces a strong support system and builds self-sufficiency.

The goal is to ensure that newcomers can rebuild their lives with dignity and stability while fostering a sense of belonging in the U.S. As a case manager, this requires strategies for identifying and accessing housing support services. Together, case managers and newcomers can work towards a shared goal of housing stability and success.



See HUD Exchange's [Client Action Plan Guide](#) to help specify steps towards client stability.

## About Switchboard

Switchboard is a one-stop resource hub for refugee service providers in the U.S. With the support of the Office of Refugee Resettlement (ORR), we offer tools and materials, learning opportunities, research, and technical assistance on resettlement-related topics. From employment, education, and health, to monitoring and evaluation, Switchboard's focus areas reflect real-world needs.

Funded by ORR, Switchboard is implemented by the IRC. The IRC has partnered with LIRS to provide employment-related training and technical assistance.



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