

Keys to Opening Doors

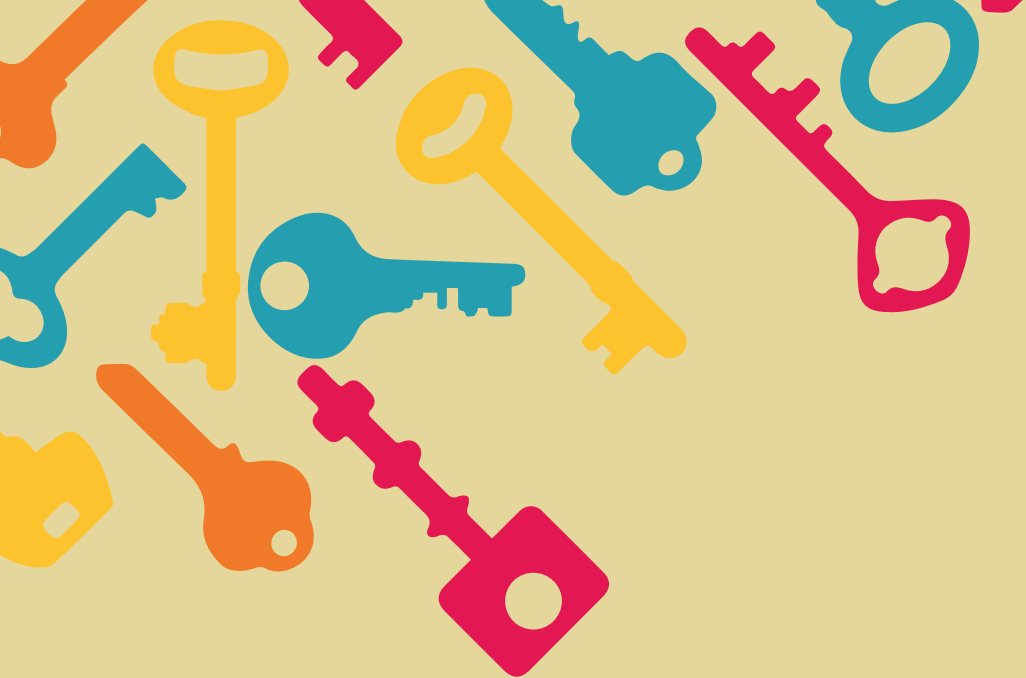
Effective Real Estate Engagement

Participants Workbook



**Family &
Community
Services**





**Real Estate Engagement Kit
Participants Workbook v2.0**

February 2014

Contents

About this Kit	4
Modules	5
Preparation Checklist	5
Icons and Symbols	6
 Introduction	 7
0.1 Learning Outcomes.....	8
 Module 1: Housing assistance products and services delivered by FACS	 9
1.1 Establishing Relationships with your Local FACS Office	10
1.2 Housing assistance products and services delivered by FACS	11
1.3 FACS forms and templates for housing assistance in the Appendix	12
1.4 Tenancy Guarantees	13
1.5 Rentstart Products including Bond Loan, Advanced Rent and Tenancy Assistance(also known as Rent Arrears)	14
1.6 Private Rental Brokerage Service.....	16
1.7 Short term private rental subsidy - Disability.....	17
1.8 Short term private rental subsidy - Start Safely.....	18
1.9 Tenancy Facilitation and Resources such as Rent It Keep It.	19
 Module 2: Developing Relationships with Real Estate Agents	 21
2.1 The Property Manager's Perspective.....	22
2.2 The role of Property Managers	23
2.3 Engaging Real Estate Agents - Initial Contact	25
2.4 Presentation (optional)	28
2.5 Developing a Business Partnership with Real Estate Agents	30
2.6 Business vs Community Relationships	31
2.7 Planning and Building Trust	32
2.8 Privacy and Confidentiality	33
 Module 3: Know your market	 39
3.1 Investigating your Local Housing Market.....	40
3.2 Share Housing Options	41
 Module 4: Securing and Maintaining Tenancies in the Private Rental Market	 43
4.1 Securing a Tenancy: Assessment and Support Planning	44
4.2 Securing a Tenancy: case management and coordinated suport	46
4.3 Sustaining a Tenancy: Property Maintenance	54
4.4 Client Responsibility	55
 Appendix	 59

Modules

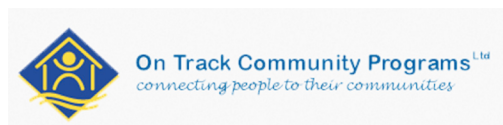
0	Introduction
1	Housing assistance products and services delivered by FACS
2	Developing relationships with Real Estate Agents
3	Know your housing market
4	Securing and maintaining tenancies in the private rental market

Icons and Symbols

Icons and symbols are used throughout this guide to provide quick visual references. They indicate the following:

	An important note or tip
	Computer based exercise
	Activity
	Refer to appendix

This kit was developed by New Horizons Enterprise and On Track Community Programs Ltd as a part of the Contract's final year for The North Coast Accommodation Project



Notes

Introduction



Introduction

Learning Outcomes

The demand for social housing across New South Wales far outweighs the level of supply, making it necessary for housing and Support Workers to consider the option of private rental housing, where appropriate, for clients who are homeless or at risk of homelessness.

FACS has a range of products and services to assist vulnerable households secure and maintain private rental housing that meets their housing needs. This assistance is targeted at households that have the capacity with support (time limited) to sustain private rental housing independently in the longer term.

Module 1.

Housing assistance products and services delivered by FACS



1.1 Establishing Relationships with your Local FACS Office

It will be of benefit for you as a Support Worker and clients of your service if you have a working relationship with staff at your local FACS office.

If you are able to identify and build relationships with key contacts at your local office this will facilitate access to the information and products you need to assist with housing clients in the private rental market. Some ways to build a positive relationship with the local Housing team is as follows.

- Go to the local office and introduce yourself and the service you provide
- Take and show your Organisation ID (not your personal ID) when attending FACS offices
- Where needed attend the local office with clients to discuss any issues or to access products
- Attend local Housing forums or meetings
- Identify what roles/teams are within the local Housing office and how this may provide additional support for clients.

1.2 Housing Assistance Products Delivered by FACS

Housing assistance products and services delivered by FACS can provide financial and non-financial assistance for eligible clients to help them set up or maintain a tenancy in the private rental market.

Details of all Housing assistance products and services delivered by FACS can be found at: www.housing.nsw.gov.au or by phoning the FACS contact centre on 1300 HOUSING (1300 468 746)

The key to utilising the FACS Private Rental Products is to understand what the product is, the eligibility criteria and the process for making an application. When applying for all Housing assistance products delivered by FACS the focus must be on comprehensive completion of documentation and attachment of evidentiary requirements. It will be beneficial for your service to develop a relationship with your local FACS office to engage in any product workshops delivered.

FACS has a range of Private Rental Assistance (PRA) products and services that you may be able to utilise to assist your clients. These services include:

FACS Private Rental Products and Services

- Tenancy Guarantee – for clients facing significant barriers to securing a private rental tenancy by offering a \$1,500 guarantee to landlords
- Rentstart products including Bond Loan, Advanced Rent, Rentstart Move and Tenancy Assistance (also known as rent arrears)
- Statement of Satisfactory Tenancy – a tenancy reference to help former FACS tenants secure a private rental tenancy
- Tenancy Facilitation and resource materials such as Rent It Keep It
- Private Rental Brokerage service to assist complex needs clients with a support provider and case plan to access and sustain private rental tenancies
- Short term Private rental subsidies for specific client groups such as the Start Safely subsidy for women and men experiencing domestic and family violence to assist with securing private rental.
- Clients receiving Temporary accommodation may also move into private rental housing with the assistance of private rental products and services.

Specific Client Contacts are;

Youth Accommodation Line	1800 424 830
Hearing Impaired TTY	1800 628 310
Aboriginal Housing Office	1800 727 555
Domestic Violence	1800 656 463
Link2Home State wide information and referral service	1800 152 152

1.3 FACS Forms and Policies



REFER TO APPENDIX

Fact Sheet's – **Rentstart bond loan**

<http://www.housing.nsw.gov.au/NR/rdonlyres/AB420E92-273C-4C49-97D7-C337199960E8/0/RentstartBondLoanweb.pdf>

<http://www.housing.nsw.gov.au/NR/rdonlyres/9D932372-4F66-4860-9C8A-BB36725C7104/0/RentstartManagingyourpayments.pdf>

<http://www.housing.nsw.gov.au/NR/rdonlyres/69C1B979-C4D5-4542-8A0E-18C114962BB6/0/RentstartinformationforlandlordsandrealstateAgents.PDF>

Fact Sheet – **Private Rental assistance**

<http://www.housing.nsw.gov.au/NR/rdonlyres/CD341C7A-1451-492F-9C34-CB79DA9246F8/0/Privaterentalassistance.pdf>

Fact Sheet – **Private Rental subsidy**

<http://www.housing.nsw.gov.au/NR/rdonlyres/5C4B072E-F6B1-4506-9FB3-03393A2F8082/0/PrivateRentalSubsidy.pdf>

<http://www.housing.nsw.gov.au/NR/rdonlyres/05AF8E2C-C360-4D83-A8AD-1393215DDD6A/0/Incomelimits.pdf>

Fact Sheet – **Start safely**

<http://www.housing.nsw.gov.au/NR/rdonlyres/F2C63220-87D4-438A-A28C-89DAE6CE3720/0/StartSafelySubsidy.pdf>

Fact Sheet – **Tenants Rights and Responsibilities**

<http://www.housing.nsw.gov.au/NR/rdonlyres/2FB1FE75-EEEE-46CF-9D17-122188A11957/0/Tenantsrightsandresponsibilities.pdf>

FORMS **Rentstart**

<http://www.housingpathways.nsw.gov.au/NR/rdonlyres/7CD38C53-2F06-40CE-8848-3B32D9BD2DC7/0/DH3049A.pdf>

<http://www.housingpathways.nsw.gov.au/NR/rdonlyres/9E1AE89F-A5F7-4A2D-81F2-7C907EFB3CAB/0/DH3049b.PDF>

<http://www.housingpathways.nsw.gov.au/NR/rdonlyres/42DE577C-6D58-47D4-A3FA-7807E8DE46D1/0/DH3049c.PDF>

<http://www.housingpathways.nsw.gov.au/NR/rdonlyres/0AF92A83-1FB8-466E-85A2-BB9204B36B33/0/DH3049D.pdf>

<http://www.housingpathways.nsw.gov.au/NR/rdonlyres/496FBA86-20A9-452E-99CB-31F6C57D6D22/0/DH2012.pdf>

<http://www.housingpathways.nsw.gov.au/NR/rdonlyres/C4DDB7B3-2933-4D17-80AD-D13F853B4652/0/PartEBondLoanAgreement.pdf>

Private Rental Brokerage Service Referral

<http://www.housingpathways.nsw.gov.au/NR/rdonlyres/214E48B6-7C6B-4C4C-A20F-7A11E71197BF/0/DH0130.pdf>

Private rental subsidy form

<http://www.housingpathways.nsw.gov.au/NR/rdonlyres/16F5CF1F-A716-4E6D-8C21-7A44235DAFFD/0/DH3026.pdf>

<http://www.housingpathways.nsw.gov.au/NR/rdonlyres/1461ADDC-B693-4DD4-BA8F-610E5476FF93/0/DH1007.pdf>

Tenancy Guarantee

<http://www.housingpathways.nsw.gov.au/NR/rdonlyres/90949793-7CBB-4532-A239-96FEF4ABCA59/0/DH0121.pdf>

Private Rental Assistance Policies

For more information and regular updates on FACS Private Rental Assistance products and services, policy requirements and eligibility criteria visit:

<http://www.housingpathways.nsw.gov.au/Ways+we+can+Help/Private+Rental+Assistance/Private+Rental+Assistance+Policy.htm>

<http://www.housingpathways.nsw.gov.au/Ways+we+can+Help/Private+Rental+Assistance/Rentstart+Assistance+Policy.htm>

1.4 Tenancy Guarantees

A Tenancy Guarantee offers one off assistance to overcome non-financial barriers by guaranteeing to reimburse the landlord/Agent costs of up to \$1,500 for tenant damage and or unpaid rent over and above the rental bond.

The Tenancy Guarantee offers an incentive and added security for landlords and Agents to accept people they might otherwise refuse as tenants.

Tenancy Guarantees can also assist clients establish a satisfactory tenancy history.

The Tenancy Guarantee is valid for the fixed-term period of the tenancy agreement for up to 12 months, or until the tenancy is terminated, whichever is sooner.

Guarantees are available to people who:

Meet FACS income eligibility criteria;

- Have already looked for private rental accommodation without success;
- Have been assessed as able to afford private rental;
- Have been assessed as able to sustain private rental;
- Do not have a debt from a previous Tenancy Guarantee;
- Do not have a current Tenancy Guarantee;
- Have agreed to the conditions for receiving a Tenancy Guarantee.

The Tenancy Guarantee only applies to agreements or premises that are covered by the Residential Tenancies Act2010.

The responsibilities of the Landlord/Agent during the tenancy is to mitigate loss and act if a tenancy breach occurs, and liaise with FACS if problems arise.



REFER TO APPENDIX

OR DOWNLOAD: Tenancy Guarantee

<http://www.housingpathways.nsw.gov.au/NR/rdonlyres/90949793-7CBB-4532-A239-96FEF4ABCA59/0/DH0121.pdf>

1.5 Rentstart Products including Bond Loan, Advanced Rent and Tenancy Assistance (also known as Rent Arrears)

Rentstart Bond Loans are available for clients who are eligible for social housing, have less than \$3000 cash assets, can sustain a private sector tenancy and the weekly rent of the property is not more than 50% of the weekly household income.

FACS can provide assistance in the form of an interest free loan for up to 75% of the bond to establish a private sector tenancy.

Repayments are to be paid fortnightly and are based on a 12 or 18 month payment plan. In exceptional circumstances a 36 month payment plan may be offered. Payments made on the loan can be returned at the end of the tenancy if there is no claim made by the landlord or real estate Agent.

Repayments can be made through Centrelink's Bond Loan Deduction Scheme, B Pay, internet banking or in person at Australia Post or at a Service NSW Centre. In exceptional circumstances such as a client's safety being at risk, a medical issue or eviction, additional bond assistance and a small amount of advance rent may be provided to assist the client's move from their current accommodation to securing private rental.

Advanced Rent is provided to clients in receipt of Rentstart Bond Loan who can demonstrate severe difficulty in meeting tenancy establishment costs or to tenants who have significant reasons for establishing a new tenancy who are at risk in their current tenancy.



IMPORTANT NOTE

A Rentstart Bond Loan is a legal contract. FACS recommends that clients get independent advice about the terms and conditions of the loan before agreeing to a Rentstart Bond Loan.



REFER TO APPENDIX

OR DOWNLOAD: Rentstart

<http://www.housingpathways.nsw.gov.au/NR/rdonlyres/7CD38C53-2F06-40CE-8848-3B32D9BD2DC7/0/DH3049A.pdf>

<http://www.housingpathways.nsw.gov.au/NR/rdonlyres/9E1AE89F-A5F7-4A2D-81F2-7C907EFB3CAB/0/DH3049b.PDF>

<http://www.housingpathways.nsw.gov.au/NR/rdonlyres/42DE577C-6D58-47D4-A3FA-7807E8DE46D1/0/DH3049c.PDF>

<http://www.housingpathways.nsw.gov.au/NR/rdonlyres/0AF92A83-1FB8-466E-85A2-BB9204B36B33/0/DH3049D.pdf>

<http://www.housingpathways.nsw.gov.au/NR/rdonlyres/496FBA86-20A9-452E-99CB-31F6C57D6D22/0/DH2012.pdf>

<http://www.housingpathways.nsw.gov.au/NR/rdonlyres/C4DDB7B3-2933-4D17-80AD-D13F853B4652/0/PartEBondLoanAgreement.pdf>

Tenancy Assistance

If you have a client who is facing eviction from their private rental property because of rent and/or water arrears, the local FACS office may be able to help if you can show that this situation arises from a short-term problem, such as a sudden illness.

FACS will only provide Tenancy Assistance once in a 12-month period. This assistance is for clients in a private rental property who are facing eviction because of rental and/or water arrears incurred due to unexpected costs.

Unexpected costs may include (without limitation), those costs resulting from:

- A car accident
- Funeral arrangements
- Unexpected illness or injury or circumstances beyond their control.

Clients applying for Tenancy assistance are required to provide evidence of the rent and/or water arrears which can include one or more of the following:

- Notification, in writing, of rent and/or water arrears from the landlord or agent for example a letter or Statement of account.
- Repayment plan agreed to by tenant and landlord or agent, in writing and signed by both signatories.
- Notice of Termination by the landlord or agent.

Tenancy Assistance may be in the form of rent arrears, water arrears or a combination of both. The maximum amount of assistance cannot exceed the equivalent of four weeks rent. This is the maximum amount of assistance FACS will provide and most clients will receive less than this where they can make an arrangement with their landlord or Agent to pay off the arrears.

This is the maximum amount of assistance FACS will provide and most clients will receive less than this where they can make an arrangement with their landlord, real estate agent or Water Authority to pay off the arrears. Tenancy Assistance is not provided as a loan, and is therefore not required to be repaid.

If a client re-applies for Tenancy Assistance more than once within a two-year period, FACS will only provide assistance with rent and/or water arrears for a:

- maximum of two weeks for unfurnished dwellings, or
- maximum of three weeks for furnished dwellings,

except where the situation may lead to placing other dependant household members at risk of homelessness if FACS does not provide assistance. In this case, FACS may provide full Tenancy Assistance.

OR DOWNLOAD: Private Rental Assistance

<http://www.housing.nsw.gov.au/NR/rdonlyres/CD341C7A-1451-492F-9C34-CB79DA9246F8/0/PrivateRentalAssistance.pdf>
H1007.pdf



REFER TO APPENDIX

1.6 Private Rental Brokerage Service

A key contact within FACS who has specialist knowledge of the private market is the Private Rental Brokerage specialist. Most FACS offices across NSW have access to a Private Rental Specialist under the Private Rental Brokerage Service.

The Private Rental Brokerage Service aims to assist client's with complex needs access the private rental market by building their confidence and skills to find and negotiate affordable private rental.

When a referral is made FACS staff will interview the client to determine their eligibility for the service to gather information about the client's needs and expectations and assess evidence required to secure a private tenancy that is affordable (See copy of the Private Rental Brokerage Service Referral form included in the Appendix).

Partnerships between Private Rental Brokerage specialists and support providers are vital to assist with establishing and maintaining a client's private rental tenancy. A Private rental specialist will work with the client and support provider to provide information through the development of support plans and practical assistance to find a suitable and affordable property. Other Housing assistance products delivered by FAC may also be offered to assist with accessing a private rental tenancy such as Rentstart, Tenancy guarantee or Start Safely to increase the client's access to the private market.

Once the client is housed, a Private rental brokerage specialist will monitor the client's progress depending on their needs for a minimum of three to a maximum of twelve months to ensure that the client is able to maintain the tenancy and that the support offered by the support provider is continuing. This also includes assuring the real estate agent/landlord that the service is continuing and that staff are available should there be concerns about the tenancy.

- To be eligible for the Private Rental Brokerage Service, clients must:
- Be an Australian citizen or permanent resident
- Meet the income eligibility criteria for social housing
- Be homeless or at risk of homelessness and have complex needs (such as a physical or mental illness; disability; domestic or family related violence; substance abuse or criminal justice issues)
- Have a support service and case plan in place
- Have the capacity to afford and sustain a private rental tenancy.

Assistance ends when the service provider, FACS and the client make a joint decision about ending the service in line with the case plan established at the beginning of the tenancy.

1.7 Short term private rental subsidy - Disability

A Private Rental Subsidy assists people in accessing affordable accommodation in the private rental market, when they are approved and waiting for Priority Housing, have a disability and are at risk in their current accommodation.

Disability subsidy is intended to assist people to continue to rent privately until an offer of social housing can be made.

To be eligible for Private Rental Subsidy clients must;

- Meet social housing eligibility criteria
- Be approved for priority status on the NSW Housing Register
- Have a recognised disability or medical condition that impacts on the person's ability to access and keep suitable and affordable housing
- Be at risk in their current accommodation.

A Private Rental Subsidy provides eligible clients with medium-term accommodation while they wait for approved social housing. It is not aimed to assist clients in the private rental market in the longer term.

Clients pay their portion of the rent directly to their landlord or real estate Agent.

FACS will pay the subsidy directly to their landlord or real estate Agent. We will make these payments either by:

- Electronic funds transfer directly into the landlord's or real estate Agent's bank account
- Cheque made payable and sent directly to the landlord or real estate Agent. Payments are made in advance.



REFER TO APPENDIX

OR DOWNLOAD: Private Rental Subsidy Form

<http://www.housingpathways.nsw.gov.au/NR/rdonlyres/16F5CF1F-A716-4E6D-8C21-7A44235DAFFD/0/DH3026.pdf>
<http://www.housingpathways.nsw.gov.au/NR/rdonlyres/1461ADDC-B693-4DD4-BA8F-610E5476FF93/0/DH1007.pdf>

1.8 Short term private rental subsidy - Start Safely

Start Safely is a subsidy to provide short to medium term financial help to eligible clients escaping domestic or family violence so they can secure private rental accommodation and do not have to return to the violent situation.

To be eligible to receive a private rental subsidy, clients should:

- Be escaping domestic or family violence,
- Be homeless or at risk of being homeless,
- Be eligible for social housing,
- Be able to demonstrate that they will be able to afford the private market rent after the subsidy period ends,
- Be willing to receive support services, where relevant.

Start Safely is not intended for people with long-term support needs. FACS will assist clients approved to receive Start Safely to access private rental accommodation and secure an affordable tenancy. Where necessary the client will be linked to a structured support plan and FACS will work with support agencies to assist clients receive the services they need to sustain their tenancy.

If clients are approved to receive Start Safely they will be required to secure an affordable rental property **that is within their financial means**. An affordable property means that they will not be paying more than fifty percent of their income **including** Commonwealth Rent Assistance (CRA).

An applicant receiving Start safely pays all their CRA entitlement plus 25 percent of the rest of their income as rent. FACS pays the balance as subsidy directly to the Real Estate Agent or Landlord.

Initially the subsidy will be paid for three months, with the client's need for the subsidy reviewed quarterly to assess whether the clients circumstances have changed, to ensure that adequate supports are in place and that the client is able to transition to sustaining the tenancy once the subsidy ends. The current maximum period a subsidy can be provided is up to 24 months.



REFER TO APPENDIX

OR DOWNLOAD: Start Safely

<http://www.housing.nsw.gov.au/NR/rdonlyres/F2C63220-87D4-438A-A28C-89DAE6CE3720/0/StartSafelySubsidy.pdf>



IMPORTANT NOTE

An important role of the Support Worker is to empower the clients they are working with and enable them to learn new skills and gain confidence in accessing the private rental market, and working with Property Managers. There are several ways this can be achieved by the Support Worker when engaging clients. Clients should be encouraged to access all Housing assistance products delivered by FACS and access any education and training opportunities in the community.

1.9 Tenancy Facilitation and Resources such as Rent It Keep It

Tenancy facilitation provided by FACS staff can assist clients with compiling appropriate documentation to secure a tenancy, searching for suitable properties, submitting private rental applications, addressing tenant database listings, as well as coaching on how to interact with real estate Agents and landlords. Tenancy facilitation can both be provided to low/medium/high needs clients through a client service officer at entry level to FACS or by a Private Rental Brokerage specialist - which is when a case plan is needed.

Rent It Keep It is a training package developed by FACS to assist clients in attaining and maintaining housing in the private rental sector. Support Workers should research how clients in their local area can access Rent It Keep It and provide referral for clients to Rent It Keep It training. This training will be useful for all first time renters, younger people and people who need to develop the skills to have a successful tenancy.

Rent It Keep It can also be used by community agencies and programs as a tool for empowering clients and therefore Support Workers should be familiar with the content of Rent It Keep It and use this as a guide for working with clients. Rent It Keep It can be delivered to an individual client or client group. There may be Rent It Keep It training in your area that is specific to certain client groups such as Indigenous people or young people.

Rent It Keep It covers many important aspects of renting, ranging from how to inspect and apply for properties to starting a tenancy and budgeting during a tenancy.



REFER TO APPENDIX

OR DOWNLOAD: Family and Community Services FACS Fact Sheet

http://www.housingpathways.nsw.gov.au/NR/rdonlyres/115C4713-14B5-401A-A282-2E3C84ACB226/0/RentitKeepit_FactSheet.pdf

Notes

Module 2

Developing Relationships with Real Estate Agents



2.1 The Property Manager's Perspective

As part of developing this kit, a survey was issued to Real Estate Agents on the Mid and Far North Coast of NSW to better understand what's important to Agents when selecting tenants for available rental properties.

The survey was distributed to 55 Real Estates across the Far North and Mid North Coasts in late 2013, with 52 questionnaires completed and returned.

As you will see the results were very positive around their willingness to engage with the service sector, as well as the kinds of experiences they have had to date working in partnership with service providers.

Property Managers were asked to respond to what they identified as the key priority for a client to secure a tenancy. As you can see from the results slides, the highest priority identified as "adequate paperwork" with 24 out of 52 stating this was a first priority. By this the Agents are referring to comprehensively completed application forms with all relevant evidentiary documents attached.

The Property Managers were then asked about identifying a priority out of the range of Support Workers and support types which would be of most benefit to a client to maintain their tenancy. The first priority for the majority of Property Managers (20 out of 52) identified brokerage, followed by conflict resolution and negotiation at 16 out of 52. It's important to keep in mind that the Agent's first priority is their financial needs. It's important to be familiar with the Housing assistance products delivered by FACS that can assist with private rental, such as Rentstart, Tenancy Guarantee, Private Rental Subsidy Start Safely and tenancy assistance for help to resolve rental arrears.

With regard to frequency of contact with Support Workers, most Property Managers identified their preferred contact to be "as the need arises" rather than options of scheduled frequency.

When we asked "Has the Property Manager had previous experiences working in partnership with Support Workers, 45 out of the 52 stated yes.

For those Property Managers that had experience working alongside of a Support Worker, 65% identified that the experience was positive.

2.2 The role of Property Managers

The responsibilities of a Property Manager are based on the specific terms of their management contract, and include the following responsibilities;

Rent

- Property Managers are responsible for setting the initial rent level, collecting rent from tenants as well as adjusting rents where applicable.
- Property Managers are responsible for collecting outstanding rent monies and allocating rent monies to the landlord and to cover property expenses.

Property Maintenance

- Property Managers are responsible for the physical management of the property including organising regular maintenance and emergency repairs.

Tenants

- Finding tenants - the Property Manager needs to fill vacant properties and market those properties appropriately for the quickest outcome.
- Screening tenants - assessing rental applications against the criteria set by the landlord/and or Real Estate Agent. This usually includes TICA (Tenancy history database) credit checks.
- Managing the lease - a lease is a legally binding contract between the lessee and lessor. The Property Manager will ensure the terms of the lease are upheld.
- Complaints management - Any complaints relating to any managed property; noise, nuisance, disturbance, unmaintained property is the Property Manager's responsibility.
- End of lease - When a lease ends or for other reasons a tenant moves out of the property, the Property Manager undertakes the following; property inspections, allocating the release of bond or security deposits as outlined in the lease agreement, the property is required to be undamaged, clean and tidy, ready for the next tenant.
- Breach of lease agreement - when a breach occurs as a result of the tenant not meeting the requirements of the lease (unpaid rent, property damage) the Property Manager has a set process to follow around warnings and evictions.

A Property Manager may be responsible for up to 300 properties, even though the industry standard is 180 properties.

In understanding the Property Manager's role as a facilitator of the rental process, we can better develop effective working relationships. Working empathetically is a great tool to achieving this.

These are some quotes that came as feedback from the survey given to Property Managers. If we can gain empathy for the Agent, we can develop an effective working relationship.

Here are some insights into what the Property Manager is looking for, from our services and our clients.

Not only are we selling our clients as prospective tenants, but we are also selling our service as a beneficial partnership in this rental process.

Some landlords will discriminate against more vulnerable clients. The best approach is to presents the client's strengths and the supports in place.

2.3 Engaging Real Estate Agents - Initial Contact



ACTIVITY 1

For effective engagement it is important to do your research.

- Create a list of local real estate Agents you can visit. Be sure to build upon already established relationships.
- Make an appointment time with each Agent to sit down and introduce yourself and your service.
- When attending your initial meet and greet appointment, you could take along coffee or morning tea.
- Be clear about what support you can offer and seek understanding as to how to best manage contact with the real estate Agent. Seek feedback as to what support the Agent would hope to receive for common clients.
- You could provide the Agent with a company profile package. The company profile package could include; business card, service pamphlets, referral forms, copy of your organisations 'mission statement' and values summary and letter of introduction.
- Be conscious that Property Managers are very busy, so keep contact short and simple.
- Following up with an email and encouraging referrals is also a great way of nurturing the initial contact.
- When establishing relationships and making first referrals consider clients with rental reference whose eligibility for Housing assistance products and services delivered by FACS is approved to ensure that the agency's first experience with your client is positive and streamlined.
- An engagement lunch could be held as a way of holding a group introduction. This is most useful if you're a newly established service in the location.

The engagement event can be done by an individual service or by a group of services. If services are working collaboratively, then an event committee can plan and deliver together. This will provide the opportunity to define your joint agency's message.

Elements of event planning

- | | |
|--------------|---------------------|
| • Venue | • Delivery/ Seating |
| • Invitation | • Feedback |
| • Timing | • Gift Bag |

Elements of planning an event;

- Identify a popular venue that will be recognised by the Agents.
- Identify specific Agents and deliver to exact address.
- Create an invitation, giving a brief outline of the service. **Refer to example below.**
- Hand deliver the invites, creating an opportunity to expand on the service information.
- Follow up call for attendees/non attendees 2 days prior to event.
- Aim to hold the event mid week so that workload for all parties is at its quietest.
- Ideally you could hold your event a period of time after you've delivered the service and established a relationship. If you have a good service story, discuss it, and even have your Agent present who may speak positively about your service.
- Have defined start and finish times, understanding that property management have other commitments - 1hr-1.5hrs.
- Ideally have Agents sitting in a large group, so as to foster a networking and uniform environment.
- Nominate an engaging facilitator who can introduce the service and who sets a friendly tone.
- Thank Agents for attending, briefly introduce yourself and your service. Keep this formal matter brief. Best use of time is informal networking.
- Workers to be seated amongst Agents to promote open discussion over lunch.
- Before Agents leave, ask for a feedback survey to be completed and offer a company profile package. **Refer to sample on following page.**
- Hand deliver company profile packs to all Agents who were unable to attend with a sorry you couldn't attend note.



Example Invite

To the property management team,

We would like to welcome you to attend an official engagement event, to facilitate a collaborative working relationship between the real estate business sector and the Community Services sector.

The event will be held at free RESTAURANT on 01.01.2014 from 12.00- 1.00pm.

During the event, we will present to you how we can offer a service that not only meets the needs of the consumer, but also you as the provider.

We sincerely hope that you are able to attend and ask that you RSVP via email to worker@service.com

Regards,

Support Worker

Sample Survey

What are the key points in being successful at gaining a tenancy?

How could support services best assist your agency?

What is your most negative experience whilst working collaboratively with a support service?

What is your most positive experience whilst working collaboratively with a support service?

Have you utilised or would you be interested in utilising FACS rental products available to assist with tenancy related issues ie. Tenancy guarantee?

2.4 Presentation (optional)

We all know that first impressions matter, so it is important to present well to the Property Manager. Property Managers operate within a busy business environment and it is respectful to acknowledge this in the way in which you approach them.

- Be punctual.
- Dress professionally and accordingly to the area.
- Be positive, courteous and professional in all communication.
- Provide prompt and articulate responses to emails.
- Provide follow up emails to inform about outcomes.
- Be honest.
- Be realistic - Don't support your client to apply for a property that is not suitable ie: unaffordable, inappropriate for children.
- Smile!



IMPORTANT TIP

Terminology and language in this sense is a vital part of your presentation. You need to be mindful of these sometimes negative perceptions and the different values and models of working that you are engaging with, when working with Real Estate Agent and Property Managers. Consider using terminology such as Community Agency, Support Agency or Community Program. Use the language of Support Worker, so it is clear exactly what your role is. Try to learn the terminology of the real estate business ie. property house, inspection - look at, termination - eviction, TICA - credit check. Assimilate into the business sector.

2.5 Developing a Business Partnership with Real Estate Agents

The main priorities for Property Managers are:

- 1** To reduce rent arrears (it means happier landlords, less work spent chasing tenants for payments / organising NSW Civil and Administrative Tribunal (NCAT) hearings etc).
- 2** To reduce tenant breaches and issues that threaten the sustainability of a tenancy (once again, means happier landlords and less time spent dealing with issues).
- 3** To increase their property portfolios (happier bosses because the business is increasing their share of the market, and generating more money).

Making the target the Real Estate Agent rather than your service or your client may also help to engage with them in a manner that they may be more responsive too.



SOME POINTS TO REMEMBER:

- Strong relationships promote positive outcomes
- Service needs to be pitched as being worthwhile for Property Managers to engage in, and refer their clients to
- If your service provides brokerage, highlight that it's not just about providing financial assistance, but rather specialist support and part of this is working with Property Managers
- Inform Real Estate Agents that you are able to assist with difficult or complex situations to avoid a breakdown of the tenancy. This will relieve costs associated with the Real Estate Agent and the owner
- Emphasise that you are able to provide specialist support and include any other specialised programs or funding your service has access to.

2.6 Business vs Community Relationships

- The importance of language is imperative. Being able to adjust conversations and minimise community service jargon will allow for better communication. Remember that Real Estate Agents / Property Managers are business people not community workers
- Real Estate Agencies have a primarily 'business' mindset
- Tenancy Support services are in a unique position to provide a service that sustains tenancies and therefore assists Property Managers to protect their investors interests
- Get to know which agencies have the lion's share of the rental market e.g. who has the largest portfolio
- They are successful for a reason, and it makes smart business sense to form good partnerships with market leaders. Other agencies who have ambitions of their own will be paying attention to not only what market leaders are doing, but who they partner with.



ACTIVITY 1

Identify 2 benefits for a Real Estate Agent to work collaboratively with you.

1

2

2.7 Planning and Building Trust

Some simple things to remember and practice.

- Being clear and consistent about what services and support can be provided, as well as what can't be, for each client / tenant / situation is always a good strategy toward building trust in partnerships
- Follow up on any agreed actions within agreed timeframes
- Do not make promises that you are unable to keep or guarantee
- Making sure that the Support Worker maintains regular contact with staff at the Real Estate Agent or the Property Manager.
- Visit RE regularly and utilise opportunities such as picking up rental lists to build and strengthen rapport
- Ensure referrals for tenancy issues are addressed in a timely manner ensuring the situation doesn't continue to escalate
- Be honest about your role and what you will need to do – requires consent from client and only disclose what relates directly to the tenancy
- Build on the recent success of well-placed tenants
- Building relationships founded on trust takes time, and persistence
- Make contact with agencies weekly/fortnightly to demonstrate a genuine desire to assist them. It will also jog their memory to make client referrals
- Remember, it is always best to avoid getting into confrontations with Real Estate Agents/Property Managers at all costs as Real Estate Agents provide the product that clients require. As everyone is aware, there is a lack of affordable housing in many regions across not only NSW but Australia
- Work to your staff's strengths i.e. Engaging with Real Estate Agents using a business model requires particular skills - is there someone in your team that has a background in business or a particular interest in this type of work.

2.8 Privacy and Confidentiality

Real Estate Agents/Property Managers may on occasions begin to discuss situations or ask for details about a client that is not appropriate, breaching the privacy and confidentiality of that person.

It is always good practice to be clear and consistent about privacy and confidentiality matters and for the Real Estate Agent/Property Managers to understand the limits of what can and cannot be discussed.

As business people, Real Estate Agents/Property Managers understand the concept of 'confidentiality' and respect our legislated obligations if we are clear and consistent in our approach.



IMPORTANT TIP

A good phrase to remember when a Real Estate Agent is demanding more information that you are not at liberty to discuss is "I am bound by confidentiality and not allowed to discuss this level of detail in the public domain". Referring them directly to the client might be a good move, however consider advising the client first and being available to support the client through that discussion if appropriate.

CONSENT FORM

NAME: _____

ADDRESS: _____

I understand that, in providing a service to me you may need to share relevant information with other service providers and to report on unidentifiable information for data collection

Release of information:

- ☐ Centrelink
- ☐ HNSW
- ☐ Other Housing providers
- ☐ Other support services
- ☐ Real Estate Agents

I give my consent for the period from / / to / / or until I exit the program

Signature: _____ Date: _____

Case worker name: _____ Signature: _____

Verbal consent: (witness name/signature): _____ Date: _____

Refusal to give consent: (witness name/signature): _____ Date: _____



ACTIVITY 4

Pair up and role play a conversation with the Property Manager. You should identify what information the Property Manager would need.



Scenario:

You visit a client at home. The client is upset and tells you that she has broken up with her partner. The client states they had an argument last night and they have been having problems for a little while now. The client discloses that her partner had been using drugs and alcohol and that she did not want him to return to the unit. The client states she can afford to pay the rent herself. You notice that the house is untidy and there is a hole in a door. You discuss this with the client and arrange for the door to be repaired. The client states she will tidy up this afternoon.

Notes

PROFESSIONAL ETIQUETTE

Every contact, you make within a professional relationship will have either a reaffirming positive or negative impact.

General:

- Address people with courtesy and consideration, regardless of how you might be feeling on the day
- Always know the appropriate attire for the type of meeting or interaction.
- Shake hands firmly, look the person directly in the eyes and smile
- In your communications with business partners, listen more than you speak; always say the person's name
- Focus on the person when speaking do not let your body language wander around the room
- When the conversation is nearing an end, ensure you have a conclusion line to allow a sharp yet polite exit from the conversation: "It has been a pleasure speaking with you".

Email

- Be professional and courteous in all correspondence
- Make sure your email address is professional.
- When sending an email to a business partner, ensure you use a meaningful and professional subject heading
- Address the recipient of the email in a formal title and their name eg: Mr Smith
- Your email should be concise with minimal questions
- Refrain from the use of text message language or internet slang
- Use a business style font and refrain from the use of wallpapers and coloured backgrounds
- Ensure your email signature is complete with all contact details outlined clearly
- Refrain from emotive language
- Proof read all correspondence before sending.

Telephone Etiquette



- Receive all calls in a professional manner
- Whether receiving or making a call always identify yourself stating your name and organisation
- Be precise in your communication stating the reason for your call
- Respond to questions clearly
- If you call for a person and they are not available, please ensure you leave a clear message .

Voice Mail

The two most important aspects of voice mail are the greeting and the message.

The Greeting

Make certain your greeting is professional. Prepare a pleasant, warm, professional greeting with any information the caller may need. If you are unavailable for an extended period of time, be certain to leave this information with your greeting so the caller will know you may not be available for some time or another way to contact you.

Leaving a Message



- Make certain you leave your name, telephone number, and times when you can be reached
- Leave your phone number at the beginning of the message with your name and at the end of the message.

Module 3

Know your market



3.1 Investigating your Local Housing Market

As a worker in the Specialist Homeless Sector it is important that you know your market and can provide up to date and accurate information about the private rental market in your location to clients accessing your service.

Each area will have distinct trends and opportunities for clients and part of the Support Worker's role is to identify what these are. Knowing your market is about understanding that real estates in your area will differ and may have different policies and approaches to client groups. Support Workers also need to be aware of alternate medium term options for clients such as motels providing affordable weekly rates or caravan parks as this is a useful tool for establishing a reference for the future.

Real Estate Benchmarks of affordability?

Although FACS allow up to 50% of income to be considered affordable if applying for a Bond Loan, real estates differ in their affordable benchmark percentages. Real Estate Agents will vary greatly in assessing the affordability of prospective tenants and this could be anywhere from 30%-50% of a client's total income. You will need to know the real estate requirements in your local area.

Research rental prices in your market

Familiarise yourself with websites such as: realestate.com, domain.com.au, gumtree.com.au, and there may also be social media pages for your local area such as Facebook pages for properties and share houses advertised on 'buy, 'swap, 'sell style pages.

In addition you need to be completing weekly searches in local newspapers and obtaining rental printouts from Real Estate Agents as this will assist to identify the average rental prices in the market. You need to then determine the weekly rent for 1, 2, 3 and 3+ bedroom properties. See FACS website for the FACS Rent and Sales Report. FACS Private Rental Brokerage staff will also have knowledge of the local market and can be contacted to discuss market conditions in your location.

What options are available for clients in other areas?

Rent may vary greatly in neighbouring suburbs and towns and therefore Support Workers need to be aware of rental prices in other locations in the area. In the town 30 km away or a suburb nearby it may be easier to access affordable accommodation, therefore searches for these areas also need to be comprehensive. A neighbouring town may have a higher volume of bedsitters and may be more suitable for clients receiving New Start or Youth Allowance.

Beach tourist suburbs/towns are popular, expensive and may be more competitive. Instead of enduring periods of homelessness in popular and expensive locations (ie Byron Bay) moving and establishing a rental history elsewhere may avoid homelessness for now and into the future.

Considerations prior to moving to a new location.

- What are the employment opportunities like in the area? Speak to local job network agencies
- Is there public transport?
- Is there accessibility to cheaper food options/support services?
- Does the client have a family or friend's support network in a new location?
- Does the client require particular support such as access to medical facilities that are only in a certain location?
- Does the client have pets? It is getting harder to rent with pets are there areas that are more flexible?

3.2 Share Housing Options

Share houses may be a suitable option for establishing a rental reference or be preferable due to income limitations for some clients such as singles and young people.

For example: If you take the ceiling benchmark of 50% (rental cost/ income) then you can assess a client's affordability, remember to keep in mind this will vary.

- Youth Allowance (\$407pf) = 50% x \$407 = you can pay no more than \$203.50pf rental.
- New Start Allowance (\$501pf) = \$250pf rental.
- DSP Allowance (\$751.70pf) = \$375pf
- All figures based on single, no children, before rent assistance. Figures as at Dec 2013.

People on low incomes may consider options for living together and sharing houses, caravans and cabins in order to be accommodated. Refer to www.fairtrading.nsw.gov.au Fact Sheet 15 "Share Housing-Tenants".

Support Workers should build partnerships with Landlords of share accommodation properties and aim to have these landlords contacting Support Workers when rooms become available at their houses.

Alternative Accommodation Options

Support Workers need to consider all options for accommodation that may meet the needs of clients.

Caravan parks and motels should be researched thoroughly to determine affordability and if the accommodation is short term, medium term or long term. Caravan parks and motels may only want short term rentals and you may be asked to leave during holiday seasons and prices are higher in beachside locations than inland locations. Some Caravan parks and motels will provide secure long term accommodation and this can greatly assist in establishing a rental reference. Caravan parks and motels may also be used as option for short term/emergency accommodation while you are working with clients to secure a tenancy. It is vital to build sound relationships with owners/managers of caravan parks and motels to ensure you can access accommodation as it becomes available and to be able to negotiate affordable weekly rates.



POINTS TO CONSIDER

- Get to know your local Property Managers and expectations of different Real Estates. Work out which Property Managers/Agencies are open to working with Housing programs and are they are sympathetic to certain client groups such as youth clients.
- Build relationships with private landlords, caravan parks and motel owners by being clear about what the housing program can provide, keep in regular contact, always respond to any concerns regarding clients and have open communication about any clients leaving/giving notice.
- Be educated about all aspects of the market so you can empower clients by providing all available options.
- Using the affordability matrix work out a single male who receives a disability pension affordability. He receives a \$751.70 and rent assistance \$124.00 per fortnight.
 50%
30% - 40%

Consider your local area. What is the market like where you work? What options would be suitable for this person? Could he afford to live alone or would he need to consider share housing?

Reflect on the following questions:

Do you have motels and caravan parks in your local area that can provide short to medium term accommodation?

Do you have good working relationships with these holiday parks?

Do you know what the average cost of a two bedroom unit in your area?

Module 4

Securing and Maintaining Tenancies in the Private Rental Market



4.1 Securing a Tenancy: Assessment and Support Planning

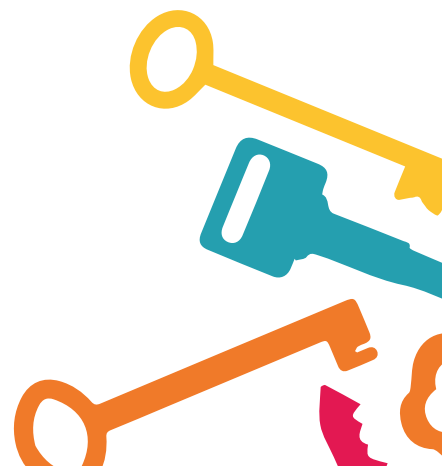
The responses suggested that Property Managers become frustrated when clients referred were listed on TICA, and did not have a positive rental reference or who were just turning up for inspections to have social housing application requirements signed off.

With services now well-informed about where the majority of Real Estate Agents stand, it is necessary to place emphasis on thorough screening prior to selection and placement.

However, it is important to remember that by providing a careful assessment, it will ultimately ensure clients are not set up for failure, guarantee better long standing relationships with Real Estate Agents and additionally, it will make way for more outcomes for future homeless clients.

Selecting Suitable Clients:

- Be realistic. The reality is that some clients with a poor rent history may not be suitable for private rentals.
- Consider if placing a particular client in transitional housing or a caravan park first would be an advantage to establishing a rental reference.
- Consider applying for FACS tenancy guarantee.
- Careful assessment is required to identify what key strengths the client has that will enable a client to successfully sustain private rental.
- Careful assessment is required to identify any complex needs your client may have that may be a barrier to their ability to maintain a successful tenancy.
- Direct clients to properties ONLY within their affordability range.



Placement

- Develop a support plan that is sustainable
- Negotiate an initial short term 3 months lease on a trial basis with regular supports in place if necessary
- Provide the real estate with a clear support pathway and an outline of what support you are able to provide the tenant to support a successful tenancy
- Role modeling, educate/inform and prepare as part of case management strategies and plan
- Does the house suit the needs of the client/family? (Suitability, transport, location, schools and amenities)
- Know what resources are available to your client in achieving a successful tenancy before things go wrong
- Living skills of client – is there a need for some extra support?
- Support the client to be realistic about what type of property they can attain. Understanding that they need to build a tenancy history.



4.2 Securing a Tenancy: case management and coordinated support

Case management is working in partnership with clients/tenants and other support services to identify and meet client needs in a holistic manner. Effective case management requires an ongoing cycle of assessment, planning, action and review.

Case management should be person-centered through a solution-focused, strengths-based approach that seeks to empower the client to take control of their own lives in a sustainable and positive manner.

The first step is to complete an initial assessment conducted to gather all relevant information regarding the client's ability to attain and maintain accommodation in the private rental sector. This includes previous rental history and other issues/barriers to be addressed.

A detailed case management plan that assists the client to find and secure sustainable housing will need to clearly identify who is responsible for which actions and especially take into account client contribution towards securing and sustaining housing.

Empowering clients to secure affordable properties within the area can mean:

- Use of Rent It Keep It course
- Setting client tasks to build skills and confidence eg: collect rental lists, identify appropriate accommodation that falls within their budget, making phone calls to real estates.
- Discussing with the client the importance of:
 - being on time for real estate appointments,
 - accepting accountability for past discrepancies.
 - presenting in clean and tidy attire (having a haircut),
 - use of respectful language and
 - maintaining rights to privacy and confidentiality by only providing a reasonable level of personal information and not divulging unnecessary personal life challenges.
- Use of role play to practice scenarios with the client
- Encouraging clients to seek alternate private housing options in local papers, local notice boards and the internet.
- Notifying the client of any appropriate housing options for them to follow up promptly.
- Discussing Share options.

Financial:

- Always prepare a realistic budget with the client
- Request the client to provide evidence of all debts and income to ensure an accurate financial position.
- Assist the client to renegotiate debts wherever possible.
- Identify a rent amount that does not exceed 50% of the household total gross weekly income, unless the client can demonstrate an ability to meet reasonable living expenses
- If the client receives a Centrelink payment, ensure the client is in receipt of the correct entitlements.
- Set up Centrepay deductions for the rent or Direct Debit if not in receipt of Centrelink payments.
- Support the client to secure a minimum of 2 weeks of expected rent to be available to contribute to bond.

Assistance with the application process:

- Ensure clients have all the appropriate documentation, 100 points ID , financial information, Centrelink Income statement as well as a Rentstart Application where appropriate. Brokerage may, in some cases, be provided to assist with the costs associated with supplying the documentation required by Agents
- Assist clients who do not have the required ID, to apply for and obtain what is needed
- Advocate for clients by providing a support letter with their tenancy application, outlining the positive aspects of the client (willingness to utilise direct debt, has worked in landscaping so will ensure a tidy property etc)
- Assist to organise childcare if applicable to allow the client to attend open times without distractions
- Approach the rental application process like you would a job application. Secure references from prominent people in the community to state your personal attributes that can relate to tenancy ie. Trustworthy and responsible.

Other:

- Appropriate referral to other services – cross agency case management plan
- Assistance with childcare /housekeeping may be required ie: both parents working, single parent with little informal support networks
- In the Case Plan include a 'move in' plan, including securing items required, eg; bed, fridge and relocating possessions into new property.

**Using case study provided, complete the following documents**

- Tenancy Action Plan (TAP)
- Rent Affordability Calculator
- Rent Application Letter
- Household Budget
- Assessment Form

Case Study

Jane Smith is a 35 year old Aboriginal woman with 5 children aged 11, 9, 7, 4 & 2. Jane escaped DV approx 2 months ago and presented to the women's refuge 3 suburbs from her home, where she currently resides.

Jane has rented a property with her ex partner for approx 3 years, her name is still on the lease. Jane advises that since she has left the property, the rent has fallen into arrears. Prior to this property, Jane occupied a FACS property for 8 years.

Jane receives a Centrelink income of \$1500pfn and has negotiated a payment plan of \$50pw with the previous real estate for arrears. Jane has advised that she is also paying storage fees of \$15pw for a unit that has some of her personal goods and household items that she was able to secure.

Coordinated Case Management



ACTIVITY 2

Brainstorm who the other stakeholders are that you will need to work in partnership with for effective Case Management.

List of Stakeholders

[illegible]

Tenancy Application Plan

(refer to appendix)

Keys to Opening Doors

Effective Real Estate Engagement

TENANCY ACTION PLAN (TAP)

Client's Name:		Property Address:	
Name of tenancy support worker:		Date tenancy commenced:	
Contact Number:		Client's Name:	

Key issues for establishing and maintaining tenancy

Issue	Suggested resolution strategy	Status (Issue is current, resolved or pending action)	Target date for issue resolution
Domestic violence	Refer to DV support service	Referral complete. Resolved	
Homeless	Application for TA submitted. Inspection for properties booked with AA real estate Relevant documents gathered for application submission	Current	
Current lease obligations	Loise with agent to remove clients name from lease arrange implementation of centrepay for payment plan of rental arrears - \$50pw	Pending	
Relocation of possessions	Confirm use of refuge trolly when required Identify friend with towbar	Pending	

Rent Affordability Calculator

(refer to appendix)

How much rent can I afford to pay?

Name:

Date:

Base Income	% used for rent	Weekly	Fortnightly
Centrelink Allowance	33.3%	\$0.00	\$0.00
Wages	33.3%	\$0.00	\$0.00
Other Income	33.3%	\$0.00	\$0.00
Rent Assistance	% used for rent	Weekly	Fortnightly
	100.0%	\$0.00	\$0.00
TOTAL		\$0.00	\$0.00
How much rent can I afford to pay?		\$0.00	\$0.00

Note: These calculations are based on spending 1/3 (or 33.3%) of base income plus all (or 100%) of rent assistance on rent

Rent Application Letter

(refer to appendix)

To whom it may concern

RE: RENTSTART APPLICATION

CLIENT: CLIENT NAME

D.O.B.: CLIENT D.O.B. (verification purposes)

Please accept this letter of support for **(client name)** in **his/her** application for **Rentstart**.

Input Client situation - *Identify current living situation and confirm homeless status ie; couchsurfing and length of this status. Identify all cost consuming barriers for client ie; no cooking facilities. Confirm all issues/barriers for client and confirm that client is engaging in support services to address.*

I appreciate your efficient and timely processing of this application, and eagerly await your decision.

Should you require any further information, please do not hesitate to contact me.

Yours sincerely,

Support Worker.

Household Budget

(refer to appendix)

Weekly Budget									
EXPENSE	WEEK 1		WEEK 2		WEEK 3		WEEK 4		
	planned	spent	planned	spent	planned	spent	planned	spent	
HOUSING									
Rent									
Maintenance									
UTILITIES									
Electric/gas									
Water									
Internet/Phone									
INSURANCE									
Home									
Automobile									
Health/Life									
AUTOMOBILE									
Auto payment									
Fuel									
Maintenance/repairs									
Public transport									
FOOD									
Groceries									
Meals out									
ENTERTAINMENT									
Movie rentals									
Events									
Travel									
SERVICES									
Medical/Dental									
Personal care									
Other:									
MISCELLANEOUS									
Clothing									
Toiletries/cosmetics									
Cleaning/laundry									
Pet care									
Other:									
DEBT PAYMENT									
Loans									
Credit cards									
Other:									
SAVINGS									
TOTALS									
		Notes:							
Monthly income									
Planned spending									
Actual spending									
Over or under amount									

Assessment Form (3 pages)

(refer to appendix)

Assessment Form

Date of assessment _____

ELIBILITY CHECKLIST

The following documents are required for Assessment:

Photocopies of 100 points ID:

Driver's Licence

☐ YES ☐ NO

Passport

☐ YES ☐ NO

Birth Certificate

☐ YES ☐ NO

Medicare Card

☐ YES ☐ NO

Current Address on Driver's Licence:

☐ YES ☐ NO

Current Bank Statement (required on date of actual rental application):

☐ YES ☐ NO

Income Statement from Centrelink:

☐ YES ☐ NO

OR

Current payslip from employer:

☐ YES ☐ NO

Previous Utility Statement in applicant's name:
(electricity, phone, gas bill, rates etc.)

☐ YES ☐ NO

Name: _____ ☐ M ☐ F D.O.B./Age: _____

Address: _____

_____ Phone: _____ Mobile: _____

Email: _____

CRN: _____ Weekly Income \$: _____

Driver's Licence No.: _____ Car Registration No.: _____

Main language spoken at home: _____ Interpreter required: ☐ YES ☐ NO

Australian Citizen: ☐ YES ☐ NO

Resident: ☐ YES ☐ NO

Aboriginal and/or Torres Strait Islander

☐ YES ☐ NO

Culturally and/or linguistically diverse

☐ YES ☐ NO

Other: _____

Applicant's next of kin

Name: _____ Relationship to applicant: _____

Address: _____

Phone: _____ Mobile: _____ Email: _____

4.3 Sustaining a Tenancy: Property Maintenance

- Education – discuss expectations of Real Estate Agent/Property Manager with client and the importance of maintaining the property to a high standard.
- Brokerage for lawn maintenance and cleaning
- Be sure to discuss with the client their rights and responsibilities as a tenant which includes the adequate maintenance of the property and identify any barriers to them meeting their responsibilities before they begin their search for properties.
- Go over condition report with client if needed at the very beginning of the tenancy.
- Contact with Property Manager after the first inspection and ongoing.



ACTIVITY 1 – Scenario:

Break up into pairs and discuss the following scenario.

You arrive at a client's house and see that there is rubbish outside in the carport.

When you go inside you see there is also damage to a wall.

Break into pairs and role play to see how you would address this with a Property Manager.

- Consider resolutions to the issues
- Financial considerations
- What follow up will be necessary

4.4 Client Responsibility

Ensuring clients seeking private rentals are engaged in the process

Clients need to agree to stay actively engaged with the service to ensure that they can be assisted to address any barriers they may have around renting a property in the private market. Changes in clients circumstances can potentially impact the ability of clients to sustain their tenancy, such as a client losing their job; illness or the impact of family violence. It is important for the support worker to emphasise the client's responsibility of communicating life event changes that may impact their capacity to maintain a tenancy. At times, clients may need to be exited from the service if they are not participating and meeting their roles and responsibilities as outlined by your service. Clients can be provided with a "Moving In Checklist" please refer to the example included Moving In Checklist.

Moving In Checklist

(refer to appendix)

Moving In Checklist

- ☐ Connect electricity/gas/water/phone. Remember the electricity may take around 3 working days to be connected so do this as soon as possible
- ☐ At the lease signing make sure you organise weekly/fortnightly rent deductions via centrepay or direct debit – this will give you peace of mind that your rent will always be paid. Remember to never stop paying your rent as you may now be evicted if you are 14days behind in rental payments
- ☐ Complete and sign the inspection report – these needs to be done within 7 days of commencement of tenancy. Also create your own list of any damages the property may already have from previous tenant.
- ☐ Keep copies of your lease, inspection report, rent receipts, rental bond number and copies of emails or letters you send or receive from your property manager. Create a folder to keep these documents
- ☐ Compile a list of emergency numbers (e.g. police, ambulance, fire, electricity company, family, friends, landlord, Case Worker, emergency details from your lease for a plumber/electrician)
- ☐ Redirect you mail if applicable. If not then notify all companies/organisations of your change of address/details. This includes Centrelink, Bank, Electricity, RTA, Medicare and other services you use.

Property Maintenance Checklist

(refer to appendix)

Property Maintenance Checklist

Real Estates will often carry out routine property inspections. Please use the checklist below to assist you in passing your inspections;

Inside the property

- ☐ Walls, light switches, doorways and doors are clean and do not have any marks
- ☐ Carpets are clean and stain free
- ☐ Windows and screens are clean
- ☐ The kitchen area is clean including the oven/stove top is free of burnt on food and carbon stains
- ☐ Shower, bathroom, toilet, and all tiling is clean
- ☐ All areas and rooms are fully accessible

Outside the property

- ☐ Lawns are freshly cut/edged and maintained
- ☐ Gardens are tidy and weeds are removed
- ☐ Rubbish removed
- ☐ Oil stains removed from carports, garages and driveways

If you have an approved pet

- ☐ Any droppings are picked up and removed
- ☐ Any pet damage is repaired/cleaned
- ☐ Ensure pets are properly restrained for the inspection

Notes

SUPPORT AGREEMENT

PARTICIPANT DETAILS

Name: _____

Address: _____

Phone No: _____ D.O.B: _____

TERMS AND CONDITIONS OF AGREEMENT

1. This support agreement shall commence on _____ and will continue in accordance with program guidelines and will end on _____
2. I understand that case worker will provide me with support ranging from a few hours per week to a few hours per month, according to the required needs of my case.
3. I agree to undertake tasks outlined below, for the purpose of securing accommodation. I am aware that not completing these tasks, to the detriment of my success, can result in withdrawal from the project.

4. The caseworker agrees to provide support for the participant; to attain and maintain accommodation in the private rental sector, within accordance of the project.
5. I understand that my participation is voluntary and that my support needs will be reviewed by a staff member on a regular basis.

I, _____ confirm that the terms and conditions of this contract were individually read out and explained to me and that I fully understand them.

Signed _____ (Housing Participant) __/__/__

Signed _____ (Caseworker) __/__/__

Appendix



Keys to Opening Doors

Effective Real Estate Engagement



Family &
Community
Services