**Individualized Housing Retention Plan**

**Information Coversheet**

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| Tenant Name: |  | Identifier/Address: |  |
| Lease Term: |  |  |  |

History of Notifications:

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| Ref # | Date of Lease Violation | Violation | Action Taken |
| 1 |  |  |  |
| 2 |  |  |  |
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Include here a standardized summary of the role of housing retention plans in the property’s eviction prevention efforts. This summary may be used to describe the purpose of the housing retention plan as a tool to address lease violations when meeting with tenants.

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**Housing Retention Meeting and Strategy Worksheet**

A new workflow should be completed for each lease violation. For lease violations where multiple meetings/violations are involved, the staff member(s) conducting the meeting and date of meeting must be noted and documented for the corresponding workflows.

* Lease Violation: Clearly describe the lease violation, focusing on the violation as the central issue being addressed in this meeting. Include the reference number assigned to the lease violation in Section 1.
* Education: If necessary, review the section of the lease that was violated. Review the tenant’s rights and responsibilities in terms of receiving notice, correcting the issue, participating in, or failing to participate in, a housing retention plan, etc.
* Actions: Share with the tenant what actions the property requires the tenant to take to correct the issue and discuss whether the tenant anticipates that they will need additional supports to make these changes. Additional supports may include being connected to a cleaning service; engagement with a community partner for assistance with medical, mental, or behavioral health needs; support from the property for enforcement of security/trespass policies; receipt of a payment plan and coaching for the payment system, etc. Clearly describe who will complete each action and the expected timeline for completion.
* Follow-up: Determine whether any follow-up is needed, and if so, when/where/how it will occur, what actions should be taken by the time of the follow-up, and by whom.

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| Name of Staff Member(s): |  | Date of Meeting: |  |

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| **Lease Violation (Ref #)** | **Education** | **Actions** | **Follow-Up** |
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| Name of Staff Member(s): |  | Date of Meeting: |  |

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| **Lease Violation (Ref #)** | **Education** | **Actions** | **Follow-Up** |
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| Name of Staff Member(s): |  | Date of Meeting: |  |

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| **Lease Violation (Ref #)** | **Education** | **Actions** | **Follow-Up** |
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| **Lease Violation (Ref #)** | **Education** | **Actions** | **Follow-Up** |
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| **Lease Violation (Ref #)** | **Education** | **Actions** | **Follow-Up** |
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| **Lease Violation (Ref #)** | **Education** | **Actions** | **Follow-Up** |
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| Name of Staff Member(s): |  | Date of Meeting: |  |

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| **Lease Violation (Ref #)** | **Education** | **Actions** | **Follow-Up** |
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**Individualized Housing Retention Plan: Check-in Worksheet**

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| Tenant Name: |  | Identifier/Address: |  |
| Staff Member:  |  | Date: |  |

**Action Item Report-Out:**

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**Is the issue resolved?** [ ]  Yes [ ]  No

If not resolved, clearly describe the actions required to resolve the lease violation, the date by which the resolution must occur, and supports to be provided, if applicable:

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If resolved, describe any additional actions that the tenant, property, or partners intend to pursue individually or jointly to prevent future lease violations, if applicable:

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| Follow-up Meeting Scheduled: | [ ]  No | [ ]  Yes | Date of Next Meeting: |  |

**Other comments:**