



FLEXIBLE HOUSING SUBSIDY POOLS (“FLEX POOLS”) WEBINAR: INTRODUCTION AND TECHNICAL ASSISTANCE RESOURCES

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Speakers:

- » Alice Keane
- » Glenn Tsang
- » Marc Trotz
- » Whitney Lawrence
- » Alison Klurfeld

TRANSCRIPT:

00:00:14—Alice Keane—Slide 1

Hello and welcome. My name is Alice and I'm available to answer any technical questions. We encourage you to submit written questions at any time using the Q&A. Finally, during today's event, live close captioning will be available. Please click on the CC button to enable or disable. With that, I'd like to introduce Glenn Tsang, policy advisor for Homelessness and Housing at the California Department of Healthcare Services.

00:00:43—Glenn Tsang—Slide 1-2

Hi everyone. Thank you for joining. My name is Glenn Tsang, the policy advisor for Homelessness and Housing here at the Department of Healthcare Services. I'll refer to



our acronym DHCS. Thank you again for joining. Just very excited to have you all here. Next slide, please. So, I'm going to really just keep my spiel very short and sweet here. My goal is really to turn the audience over to our subject matter experts to discuss Flex Pools, but I will go through a few brief slides to just briefly highlight some of the ways DHCS is addressing homelessness for our members, and also just describe some of what the Flex Pool model is that we're discussing. And then also just encourage everyone here to stay for updates on our technical assistance that DHCS is rolling out for Flex Pools, and additionally, a Q&A session that we'll have with our subject matter experts as well.

00:01:47—Glenn Tsang—Slide 4-5

Next slide please. And next slide. So, I won't go through this slide in great detail. I think just wanting to just really underscore just some of the very things that are impacting our members' health and DHCS recognizes that homelessness is a pretty powerful determinant of one's health. So, these are just some of the numbers that we have in front of us and just some of the common health issues that our members are facing. Next slide please. So DHCS, over the last several years, we've gone through a lot of different efforts, initiatives underway and some that are coming online now. And all that is to say is that we're looking at pulling on any lever that we can to just really make more strategic uses of Medi-Cal dollars. We've seen transformations to the Mental Health Services Act, which will be known as the Behavioral Health Services Act, for example. And all of this is just to more strategically address those social determinants of our members is health and create more access to services.

00:03:07—Glenn Tsang—Slide 5

And additionally, we are working in strong partnership and collaboration with all of our other departments. So, a lot of what we're doing is bringing resources to the table, just being another piece to the puzzle in solving homelessness and preventing homelessness. And there's just a lot of efforts underway throughout the state that we're just very excited about. And then one of these efforts that we're hoping that can help start bringing this all together is the flexible housing subsidy pool model. I'm just going to call it Flex Pools for short.

00:03:40—Glenn Tsang—Slide 6

Next slide please. So, I highlighted earlier that DHCS does have some initiatives underway. Ones that I want to just underscore that helps lead us to this webinar here today is really our CalAIM initiative. Number one, we've received approval and have authority to really roll out services that address those social drivers of health and

address housing needs. So, we've had commonly known as our housing-related community support. So, this is housing transition navigation services, housing tenancy, housing deposits, and others that are offered through our Medi-Cal managed care plan partners. And then also coming online, just really doubling down on this effort is transitional rent. Beginning July 1st, 2025, managed care plans will have the option to cover six months of rent for our members. And then beginning Jan 1, 2026, we will start rolling out a phased implementation of transitional rent where transitional rent will be a mandatory benefit for managed care plan partners to start covering for our behavioral health population of focus. Underscoring that as well. Jan 1, 2026 for behavioral health population of focus for transitional rent to go live. And a lot of this is really with an eye towards our county behavioral health delivery system.

00:05:13—Glenn Tsang—Slide 6-7

I mentioned earlier we have our Behavioral Health Services Act, which transformed the previous Mental Health Services Act dollars and created a funding bucket and reallocation of dollars and essentially just housing interventions. So counties will receive funding for housing interventions to really address the housing needs of our members with behavioral health conditions. And this will go live July 1st, 2026. So all that is to say, if we go to the next slide is that we have several initiatives and efforts underway. And one thing that we've been looking at is how do we essentially braid these efforts and these resources for our members, especially understanding the fact that there's different delivery systems, different funders, and wanting to really try to promote more braided efforts.

00:06:10—Glenn Tsang—Slide 6-7

And that led us to the encouragement of Flex Pools. So we've looked into this model, we've done landscape scans and without spoiling what our subject matter experts will describe recently as of yesterday, we rolled out a Flex Pools TA resource paper that describes the model, but also with a focus on some of the Medi-Cal resources that we have and the BHSA resources that are coming online. And then just really how this can start becoming a thing. And then also DHCS, I'll talk a little bit about this later, is just leaning into technical assistance that we'll be providing at the state level, but then also local level as well. So more to come on that in this webinar. But if we go to the next slide and next slide please. And with that said, I really just wanted to stop talking here and turn it over to our subject matter experts. I'll let them introduce themselves, but just very excited for them to be here and be part of the team and promoting Flex Pools. So with that said panel, I'll turn it over to you to introduce yourselves.

00:07:22— Marc Trotz —Slide 9

Hi. My name is Marc Trotz. I'm currently a housing and healthcare consultant, and I formally had worked in the city and county of San Francisco for quite some time and then worked for a period of time in Los Angeles where I started the Housing for Health organization and launched the first widespread Flex Pool in the state. And I'll turn it over to Whitney.

00:07:56— Whitney Lawrence —Slide 9

Hey everyone. Good afternoon. Whitney Lawrence. I am one of the consultants supporting the effort. I think of most relevance to today's content my previous role was as the director of policy and planning at Housing for Health for the Los Angeles County Department of Health Services. So as part of that work, I oversaw the Flex Pool, the flexible housing subsidy pool in Los Angeles. It was during a major growth moment you could call it. We were just starting to operationalize measure H dollars. It was a wild ride and we learned a lot and we're hoping to share some of those hard-earned lessons with you all. And I will pass it to Alison.

00:08:41— Alison Klurfeld —Slide 9

Hey all, I'm Alison Klurfeld, so also a consultant. And I work right now on a lot of housing in Medi-Cal projects. So looking at community supports across the state, getting to work with different agencies on implementation, especially those housing-related community supports. But previously I was the director of safety net programs and partnerships at LA Care. So I actually got to work with Whitney. It was a little bit after Marc. On the Medi-Cal managed care plans involvement in and partnership with the flexible housing subsidy pool, and also working with the managed care plan on how to interface with the Flex Pool around the Whole Person Care program, the launch of the community supports programs and other changes that really the state has gone through over the past several years. So excited to talk with you all and I'm going to turn it over to Marc now to dive into everything about Flex Pools, at least starting us off.

00:09:32— Marc Trotz —Slide 10

All right. Hi everybody. I'm really happy to be here trying to drum up enthusiasm for the Flex Pool. And if nothing else, I hope to leave you today with the idea that it is absolutely possible for really any community to get one of these things up and running. You may have a Flex Pool already and you want to expand it or maybe you're just going to get started. But I hope this material gets you excited about it. And as you're going to hear later on, there's going to be some technical assistance in a couple different modes

to help you do it. So on this slide, I'm going to start with bullet number three because that I really think is the core of the Flex Pool is that it's an organized way to help a community secure units. I think as we all know, that can be somewhat of a chaotic situation in some communities. There may be multiple organizations out there trying to work with the same landlord pool and that can be effective and it has been effective. But what we found in Los Angeles and in some areas, other communities that have started a Flex Pool, you can really amplify and solidify and expand your landlord engagement through the Flex Pool model and especially centralizing some of the functions around unit holds, bringing on units and so forth. So that's one of the main, I think selling points of the Flex Pool.

00:11:29— Marc Trotz —Slide 10

They also operate as a fiscal intermediary. So as you can imagine, and any of you who have been in this business trying to cut hundreds or maybe thousands of checks to landlords reliably at the beginning of the month, every single month is not an impossible task, but you have to be organized and set up to do that. So the beauty of the Flex Pool, and I'll say the one that we started in Los Angeles, our partner was Brilliant Corners and. Just like anyone who's getting started in a new line of business, they didn't have it all down the first day or the first month or even the first year. There's a learning experience. But working with the other partners of the Flex Pool that can be developed. So having this flexible fiscal intermediary is a very important part of the Flex Pool model.

00:12:33— Marc Trotz —Slide 10

And then very important to today's conversation, especially regarding what Glenn was saying on the new state resources, the coordinating and blending of funding is one of the key factors that a Flex Pool does. So we all know that in this day and age, there's not going to be just one source of funds paying rent subsidies. And so you need some coordinated effort that can help match the funding sources that you do have to the rental market and have some way of also very accurately accounting for who was housed by what funding source and make sure it's attributable back to that funding source and reimbursed. And that is definitely a doable activity, but it does require some thought in terms of how you set that up, how you set up the referral sources, how you set up the compliance and all that stuff.

00:13:37— Marc Trotz —Slide 10

And fourthly, and equally as important as all the other points is the coordination with the housing support services. So a well-thought-out Flex Pool, you're going to have a, in some cases multiple ... I think in Los Angeles, it may be over a hundred at this point. Support service providers dovetailing with the rent subsidy. And that's all part of this rubric of bringing housing rent subsidies and support services to individuals who've been homeless or formerly homeless.

00:14:16— Marc Trotz —Slide 11

Next slide. All right. Coordination and centralization. So these are the core principles. I do want to point out that all of this is our best thoughts and collection of information talking from our own experience and talking to other people who've done this. There is no one right way to do this. And depending on the scale, if you're trying to do 50 units or you're trying to do a thousand units a year, some of this obviously is tailored and changed but one of the key factors is the coordination and centralization. So I mentioned it on the last slide. Key to this is having, in my opinion, the fewest number of entities out there trying to engage the landlord community. So there's not competition, so there's not confusion. We have talked to some communities that have multiple Flex Pool operators and there's some reasons for doing that, but they also do point to that it is confusing to the landlord community on who they work with.

00:15:39— Marc Trotz —Slide 11

The other point that the help is person centered. This is what I really love and was drawn to in terms of trying to develop the Flex Pool is that it's very tailored. We all know that there's not enough and there probably never will be enough project-based developments to help everybody and nor does everyone want to live in a project-based apartment building or a supportive housing building. And so what we were really happy to be able to do in Los Angeles, and what Flex Pools can do is really look at what the person needs in terms of housing. So if they want to live in a certain community, if they need a certain type of unit due to any consideration, accessibility, whatever that might be, the Flex Pool operator has the ability to go and find that unit in the neighborhood the person wants to live in. And in many cases, the type of unit, obviously the space and other amenities that the client needs.

00:16:46— Marc Trotz —Slide 11

And even in California, in this tight housing market, I still believe that there are units out there in almost all communities to be able to do this work in. It just takes a very focused effort. And certainly one of the learnings that we had was the deep collaboration and partnership that you have with your various partners, which we'll be talking about. But anyone thinking of doing this probably shouldn't be of the opinion or of the thought that I'll just do a contract with X organization and they'll stand this thing up. That's generally not how it works. You need both your leadership and your operator and your funding sources all figuring this thing out together and working together to do it.

00:17:42— Marc Trotz —Slide 12

All right. Next slide. Okay. So again, this isn't always how it has to go, but here's the main entities or players in this space when you're trying to do a Flex Pool. We're talking in terms of the lead entity. This is often a government entity and in Los Angeles it is and was the Department of Health Services. So it's a county agency. And it's the organization that really has the passion and the fire to get it done. It doesn't have to be a health agency, it can be a housing agency, it can be a quasi-government agency, but in our experience, you really need someone who wants to get it done and is willing to pull the levers of government and other levers to make it happen.

00:18:41— Marc Trotz —Slide 12

And then there's the operator, which is normally a contracted entity that is actually running it, that's cutting those checks, that's out there pounding the pavement, developing landlord options and holding units and all of that stuff. And in communities that are looking at this and listening today, you may be saying, "Well, we don't have an operator up here. We're a small community and so forth." I think with the TA that's forthcoming and some creativity that can be overcome. And again, on day one when Brilliant Corners came down to LA, they had a staff of three people working out of a two-room office. So it wasn't like they had done this at that scale before. But with good policies and great collaboration, you can get it done.

00:19:34 — Marc Trotz —Slide 12

And then just quickly, the other funding sources here are, the other boxes on this slide, excuse me, are obviously the landlords. And in many ways the Flex Pool's customer is the landlords. You can think of. That's really what you're setting yourself up to do is be successful with the landlord community. And the other partners are obviously the

funding sources, which we'll talk more about, but you'll probably have multiple funding sources. You may be using transitional rent, BHSA and have some say other county funds for instance. And so they also have a key hand in the mix here because they're the ones who are going to be supplying the funds and also having the target population in mind.

00:20:25 — Marc Trotz —Slide 12

And then of course, the other two entities would be the participant, which could be looked at as the center of the slide that happens to be on the lower right-hand side right now, but that's what you're trying to do is increase housing options for homeless people. And then as I talked about earlier, you've the support service community. So in many cases you're centralizing the rent subsidy function through a single operator, but you have multiple housing support service providers in the mix and you're coordinating with them. Okay. Next slide. Turning it over to Alison.

00:21:09 — Alison Klurfeld —Slide 12

Great. So Marc's just laid out, okay, what are Flex Pools, what do they do, how do they work? And I want to talk a little bit about the why. Because I know I'm talking to an audience who is full of folks who are standing up multiple new state programs dealing with changes at the federal, state, county, city level. And why do we think this is worth your time? Why is this not just one more thing to do, but something that actually makes your work potentially much more effective and worth your time? I think as Marc mentioned, you'll see in that top blue box, right, the main value of a Flex Pool is the value it delivers creating a seamless experience for landlords, the participants or clients or members being served and the housing support services providers. So I just want to say it's actually a little bit harder. It's more work sometimes for the lead entity, for the operator, for the funding partners to create that seamless experience, but there's so much value created by the way that it makes things easier for the landlord's participants and housing support services providers.

00:22:11 — Alison Klurfeld —Slide 13

So some of the ways that it does that specifically. I think the first thing to talk about at the top there is participants actually getting housed and retaining that housing. I think many folks who have worked for a long time in the homeless services and rehousing systems have found that somebody might get a federal voucher, they get a housing

subsidy, that should be their golden ticket, but it turns out to be worthless because no matter how many apartments they go to, no matter how many landlords they're talking to with their case manager, they can't actually get into housing. The hoops are too big, the paperwork is too much of a barrier. So the Flex Pool really turns that on its head focusing on how to get those participants housed, and that's a huge part of the results.

00:22:51 — Alison Klurfeld —Slide 13

The other thing is that by developing not just initial but ongoing relationships with landlords, you can head off problems before they start and really improve housing retention by having that open channel of communication and somebody to work with a landlord as well as often you have existing case management staff who are working with the tenant or client. The next way that a Flex Pool creates value on ... Going down to the right. The centralization. So Marc talked about this, but consistency is so important and clarity for landlords. If you are a landlord, getting familiar with the paperwork from so many different programs is really confusing and you have to call different people. The idea of a Flex Pool is there's a number to call. They have night and weekend, at least a message service and the ability to call you back right away. Just great customer service for addressing their issues and communicating with them very clearly. And having it consistent means that there's no competition among different agencies that are all trying to get the same small pool of landlords.

00:23:54 — Alison Klurfeld —Slide 13

The next thing going down to the right again that Flex Pools do is this unit inventory. Having a portfolio or a pool of units is really exciting because it reduces the time that you're spending on housing search. So in the traditional model, a person experiencing homelessness might get assigned to a housing supportive services case manager and maybe they get a subsidy or they have some income from SSI or something else or a disability. And so then it's okay, let's go and do our housing search. And every time you have a new client, that case manager is having to do a new housing search and it's very, very time-consuming and it's not very successful quite frankly.

00:24:34 — Alison Klurfeld —Slide 13

So the idea of the Flex Pools, let's turn that on its head. Let's look at a group of people who are coming up our next 25 or our next 50 or a hundred or 200 clients, whatever it is at any scale, and trying to get a group of units in so that you're not competing with

every single person in the private market, but getting units in that are coming to the Flex Pool. The landlord doesn't know exactly who they're renting to as they start that relationship, but they know they're going to be part of the Flex Pool and then the individual is matched in. It's much faster and much better for housing placements and it frees up the housing supportive services providers to do what they do best, which is actually to work with that individual, gaining their trust, helping them build stability and get ready for and maintain housing.

00:25:17 — Alison Klurfeld —Slide 13

Going around to the right then. Another thing that's really cool about Flex Pools is the idea of centralizing administrative and program functions so that you can do more than one program. So one thing we like to say is the first program you do for your Flex Pool is going to be the hardest because that's the first time you're building the infrastructure. But once you've built your housing location or your landlord relations just step up, you can add a new program when you get a new funding source. You don't have to build the entire program from scratch because that infrastructure around the core functions around funding braiding, fiscal intermediary, the unit portfolio, the landlord relationships, coordination, that infrastructure is already there. So you just can add new programs in much more easily.

00:26:01 — Alison Klurfeld —Slide 13

The last thing that's really cool about flexible housing subsidy pools is why Flex is in the name. You want to have flexibility to meet participants' needs. Flex Pools can do things often in creative ways, turning one-time funding into longer-term subsidies. Turning different pots of money into things like shallow subsidies where a portion of someone's rent is paid instead of all of it, or paying for fees that might paying for pet fees. That might be a huge barrier to someone getting into housing. So it's hard because not all funding sources allow for all expenditures, but the goal of the Flex Pool is to build it as flexibly as possible, and that flexibility extends to how participants work with their case managers, how landlords needs are met, and how funders and providers are working also with their operators.

00:26:50 — Alison Klurfeld —Slide 14

So we'll go to the next slide now. So two audiences we think have a lot of potential value to be derived from Flex Pools are counties and managed care plans. Why? You've

heard this a bunch of times from DHCS and Glenn mentioned at the beginning, there's an opportunity to maximize coverage for eligible services, especially with transitional rent and BHSA housing interventions coming up. Those two funding sources don't necessarily stand alone. They need to be more effective working together with one another and with other funding sources. So for Behavioral Health Services Act, some of that money can be used to actually create new locally controlled permanent rental subsidy slots and Flex Pools can help administer them taking some of the burden off of county behavioral health departments to do every piece. Maybe there's an operator who can help do some of the administration. BHSA housing interventions also has a lot of exciting opportunities for flexible funds around supporting unit acquisition, landlord relations, administrative costs, things that aren't covered by other funding streams. That could hopefully be paired through Flex Pools with contributions from managed care plans and managed care plans could get a lot of value from Flex Pools from connecting members who are eligible for transitional rent to longer term subsidies.

00:28:03 — Alison Klurfeld —Slide 14-15

As Glenn mentioned, transitional rent is an up to six month intervention. What happens on month seven? Well, if you're working with a Flex Pool from the beginning, that helps you line it up when someone is entering housing instead of scrambling once they get in. In addition to the behavioral health side of county, city and county governments can also utilize Flex Pools to do different state funded programs and support the use and uptake of federal vouchers. And you'll hear about that in a second when we talk about San Diego. Next slide please. So the landscape scan. I saw some questions coming into the chat already around like, "Okay. You all are from Los Angeles, but it's a big California. Not every place is like that." We hear you. Oftentimes with Flex Pools people just think about the LA context, but it's actually bigger. There are not a ton of Flex Pools right now we're aware of seven. Not all have all four of the core functions. Some have two or three. But I do want to call out while you have some full scale Flex Pools in Los Angeles, San Diego. Solano is another one. A different context in terms of less urban. Certainly not an urban dense environment. Sacramento, Alameda. There are big places, small places, even little Trinity's got one ready. I say that and now I'm going to have offended all of the folks from Trinity County.

00:29:18 — Alison Klurfeld —Slide 15-16

We're really excited to see what small counties can do with this. So you don't necessarily need an enormous scale, you don't need an urban area. Flex Pools can work

in lots of different places and they don't always look the same in every place. So you'll see in the paper, the technical assistance resource some more detail on these seven Flex Pools and how they work. And Marc and I are going to go over two of them. So we can go to the next slide. I'm going to talk a little bit about San Diego first. So San Diego has a really cool Flex Pool model in that they are led by the local Continuum of Care lead agency. All the other ones that we're aware of are led by a county lead agency. But here in San Diego, the COC was really who took the lead. As their operator. They contract with brilliant Corners. You'll see them again in LA. Brilliant Corners does a landlord and the participant facing activities under that contract from the regional task force on Homelessness.

00:30:11 — Alison Klurfeld — Slide 16

So one of the problems that San Diego's Flex Pool was trying to solve was they were finding lots of unused federal vouchers and trying to figure out how they could put a Flex Pool structure in place to support more placements into permanent housing by getting that portfolio of units up and running. And they set an ambitious, but they thought manageable goal initially in 2020 to house 140 households. They placed 239. So great excitement there. And their retention rate has been good too. Between the landlord relationships and the supportive services, they were able not only to place people, but to keep them in housing and continue growing the program. So that's one example. I'm going to turn it over now to Marc to talk about Los Angeles.

00:30:56—Marc Trotz—Slide 17

Okay. Hi again everybody. Yeah. So in Los Angeles, the box on the right-hand side there I think is worth looking at. We started off very small and it just shows the possibility of scaling depending on what community you're in or if you don't need to scale that large, that's absolutely fine too. But we started off with 171 individuals housed in the first year. And it also took us probably a year and a half to get to the point before we actually started housing people. So I think that's the beauty of this effort right here. We started getting ahead of it with these funding sources and having the resources and technical assistance through the state to help people get prepared. Because it does take a few moments to get all of this laid out. But we started off small, but we had very concrete goals and each year we were saying we were going to double the amount of housing we did. And through close collaboration with Brilliant Corners, we did that. 200, 400, 800 and so forth. And as you can see here, in 2023, the Flex Pool

housed 12,000 people. So that just speaks to the variability and the variabilities of the scale that you can do this.

00:32:39–Marc Trotz–Slide 17

And just in terms of the nuts and bolts for this example, I think I had mentioned earlier it was the Department of Health Services that took the ball and ran with it. We did an RFP, we attracted Brilliant Corners, which had a different name at that point. West Bay Housing to this. They had done some much similar work on a much smaller scale in San Francisco housing people coming out of a skilled nursing facility in the private market using a Flex Pool-like market. So they had the sense that this was something they could do and something that would work. And so then we just leaned into it. And really we started with one funding source and one target population, which was the Department of Health Services own money trying to house a population that we called high utilizers of county healthcare services.

00:33:31–Marc Trotz–Slide 17

But as ... And Alison alluded to this. As we built the model and had the infrastructure in place and Brilliant Corners was gaining its experience in doing this, other entities within the county were seeing what was being done and wanted to get into the program with us, which is one of the really wonderful things about doing this. There's fairly simple ways of adding other funding sources, other target populations and utilizing the same infrastructure basically to get it done. And that's something that with further technical assistance and so forth, that can be discussed with communities on maybe starting here and then adding in on other funding sources as their capacity expands. So with that, I will be turning it back to ... Oh no, I'm staying on, sorry, one more.

00:34:31–Marc Trotz–Slide 18

Thank you for switching slides there. We've thrown a lot of stuff at you here so this is really just a quick summary slide. If you're thinking, well, how do you really get going? And this will obviously be some of the technical assistance that can be provided in helping communities to do this. But in short, you're going to start with hopefully someone in your community who's super excited about it, whether it's a county agency, whether it's a health plan, whoever, someone who's really pushing for it. And then in broad brushstrokes, you're going to be trying to identify other partners who are interested. You're going to be developing high-level concept for your Flex Pool who

the target populations are. Many times you'll have to seek some formal authority from a board of supervisors or city council or some other entity to get this done. Certainly in terms of potentially approving a contract. And important to this is how you structure those contracts and what approvals you can get to give the operator as much running room as they can in terms of the length of time and what they can say about the stableness of the Flex Pool.

00:35:58–Marc Trotz–Slide 18

Landlords always want to know. They're used to Section 8 and there's some drawbacks to Section 8, but they know that it's generally a stable source of rent subsidies. So you want to be able to portray this new Flex Pool subsidy as long-term and as stable as possible. Then there'll be that process generally of releasing some solicitation RFP to get your Flex Pool operator. And then the nitty-gritty comes in. Negotiating those contracts, working with your funding partners, figuring out your referral pathways, figuring out the accountability and all of that, and then leading to your launch. So there's a couple steps in there, but when it's all said and done, it's very doable. And now I'll turn it over to Whitney and she's going to talk about our TA opportunities that are coming up.

00:36:57– Whitney Lawrence –Slide 20

Yeah. Thanks Marc and Alison. So my job today as I understand it, is to sell you on the TA that Marc, Alison, and myself will be providing and that we hope to provide to you and to your community. Okay. So over the next couple of slides, I'm going to walk you through the structure and the goals of the TA opportunity. Before I start reading to you off of the slide deck that you can see, I do want to say from the get-go that our intent for the TA is for it to be highly value add for you and for your team. I've been on the county side of house, I know how busy you are, I know how stacked your calendars are, and I never ever want to be a low impact meeting that is taking up space on your calendar and taking up time in your day. So our goal is to ensure that the TA feels impactful and that it feels supportive to you, and that we can support you with the meaningful thought partnership as your community works to either launch or to expand a Flex Pool.

00:38:08– Whitney Lawrence –Slide 20

So you can read the slide on your own, but the one thing I want to be sure to highlight on this slide is that we do expect the TA to be fairly tailored to meet the needs of your community. And I can see some of the questions coming in on the chat in the Q&A. I know that your landscape has its own flavor. Every jurisdiction has its own sticky issues. So we do anticipate that there are going to be through lines and there are areas where we imagine many of you will need similar types of support, and we suspect that the stickiest issues are going to have that pretty specific local flavor. So to that end, we do intend to work pretty closely in one-on-one relationship with you all. So the TA will look a lot like one-on-one TA in relationship with some combination of Marc, Alison, and myself.

00:39:07– Whitney Lawrence –Slide 21

We'll go next slide. Okay. After many animated conversations, we landed on calling it the Flex Pool Academy. So come join our academy. And let's talk about who the TA is for and what the TA is. So who is it for? The TA is for any organization interested in serving as the Flex Pool lead entity in your community, in the community. So we've given a few examples today. We imagine this could be a county department, this could be an MCP or it could be a COC lead agency. We are also asking that folks who apply to receive the TA have identified potential partners who can support the effort locally, like some funding partners for example. So what support will be provided? As I said earlier, we do expect the needs of your team and local landscape to drive the types of support that you'll need from the TA.

00:40:12– Whitney Lawrence –Slide 21

Slide 21 Whitney Lawrence – 40:12 Marc, Alison, and I come from intersecting, but different backgrounds. We have different approaches and different styles. So I do like to think of us as a deep bench. We have different connections in different communities. So we do also expect that in addition to the three of us, part of our work in the background is going to be like, "Oh. Well, you should talk to this person in this community. Or have you met this person in your behavioral health department?" So we do expect also to be making those connections for you all in the background. That said, we do plan in the orange over here, you can see we plan to provide support for a local kickoff in your community. This is all for folks who are apply to and chosen to be



in the academy. So there'd be a local kickoff. The goals of that would be to support relationship building, any initial visioning work that needs to be done so we can firm up what is it that we're trying to accomplish here together.

00:41:15– Whitney Lawrence –Slide 21-22

And I think really the bulk of what the TA offering is the second bullet, which is the ongoing coaching support where we will be in direct relationship with you working through some of your sticky issues. You can air some of your dirty laundry and we'll keep all of your secrets close to our hearts. We can do document review for you. We can provide you with some advice. And then the third bullet here is that we do expect there will be at least one or two DHCS hosted community convenings. I think. Next slide. Great. Thank you. Okay, so this is the slide that answers how do I get into your very exciting academy? DHCS will release an application for the Flex Pool Academy in the spring of this year. Organizations will be selected by June, and we do expect that tailored TA to be begin in July. The application will ask you to demonstrate leadership support from your own organization as well as support from key partners in your community, such as potential funders and other stakeholders. And you can see on the slide that more information and the application will be posted at the DHCS Housing for Health website.

00:42:32– Whitney Lawrence –Slide 23

Let's go next slide. Okay. So if you're sitting there thinking, I don't know, I don't know if this opportunity is right for me or for my organization. I don't know this Whitney Lawrence lady, but I trust Alison, I trust Marc, I want to talk to them more about this. If you have questions about what is the Flex Pool model, how could this work in your region? I see some questions coming in the chat about how this might look in your community. If you actually are thinking, Whitney, that academy, that sounds nice, but I've got traction right now and I need to talk to you guys ASAP. Or if you don't think of yourself as a likely lead entity, but you are interested in supporting Flex Pool efforts in your community, particularly if you think you might want to be a funder of a Flex Pool, let's connect. We encourage you to reach out. We're available. So the application will launch later this spring and the formal academy will start thereafter. But Marc, Alison, and myself, we're available to you now to have a few introductory conversations. So if you want to do that, if you want to learn more about the opportunity itself, about Flex Pools, if you just want to bat around some ideas about what this might look like in your community, reach out. We're here for you.

00:43:57– Whitney Lawrence –Slide 23

Our goal is to be here for you throughout this process. Our goal is to be supportive, and I really feel that the sooner we can get into a one-on-one conversation with you, the sooner we can get in direct relationship with each other, the more supported you're going to feel. So I think you can see the email. Yeah. You can see the email on the slide deck, and then I imagine we'll also be dropping that email in the chat. So if you want to have one of those introductory conversations, if you're not quite sure how you fit into the effort, let's connect. We're here for you now.

00:44:33– Whitney Lawrence –Slide 24

I think let's go. Next slide. Okay. We're going to get fancy. We're going to do a tech-savvy thing here, and we're going to launch a poll. So you should be seeing the poll in front of you. If you could just take a moment to please read the poll, respond to the poll. We're asking if your organization would be interested in learning more about or receiving TA on Flex Pools. And you have a number of options that you can choose from. So I'm going to be quiet now so you can read that poll. And we're going to leave this up until we get some hearty participation. So please let us know.

00:45:42– Whitney Lawrence –Slide 24

And for folks who noticed the silence and looked up from their inbox, we're taking a poll right now to gauge your interest in receiving TA related to Flex Pools. So take a moment to answer the poll. Alice is going to let us know when we've had some hearty participation. And after this, we are going to open it up for questions. So the sooner you answer the poll, the sooner you get some Q&A time.

00:46:31– Whitney Lawrence –Slide 24

Okay. I'll give it just a few more seconds. And then Glenn, I think we'll pass it to you in just a second. But Alice, let me know if you're kicking me under the table and I should leave it open longer.

00:46:47– Whitney Lawrence –Slide 24

Okay. I received no kick. So Glenn, I'm going to pass it to you. And I think that we can go next slide.

00:46:57– Glenn Tsang–Slide 25

Just big thank you to the panel. And again, just very excited to really launch this effort, especially the TA effort. Before I get into Q&A, if you have questions, please drop them in the Q&A chat. Also, I saw a couple of times that the link to our flexible housing subsidy pulls TA resource, that's our paper, it's linked in the chat. We released it yesterday. So encouraging you all to go take a look at it. And I'll try to cover a few of the questions that are in the chat, but again, we will not be able to get to all the questions, but please feel free to email flexpools@dhcs.ca.gov. So panel, I'm going to throw this first question out to you. How does this model work in rural areas like Modoc, Lassen, Siskiyou, Sierra, and et cetera? There are not large pools of housing. Would be interested to hear how that might work.

00:47:54– Marc Trotz–Slide 25

Well, I can start off. I think in any community you have to tailor the housing search to the market that you have. So in a small community, you're not going to be looking for large blocks of units in 200 unit apartment buildings. And that's the key also in terms of who your operator is. How well do they know the real estate market in your community and how can you pick up that one duplex over in this neighborhood or happen to know of a struggling small landlord with some units available. And I think the key is, and I think that we may not have said this explicitly, one of the great things about the Flex Pool is it can be super flexible with the landlord. So you're not going to approach some landlord and say, "Yeah, we love that unit, but you need to change all these light switches. You need to do all of this. You need to do all of that. You need to wait two months before you get your first payment," and all of that, which is going to drive most people in a rural area or in any area away from you. So the flexibility plus the sensitivity to the local housing market, I think is what I would say to that question. I'm sure the others have ...

00:49:16– Whitney Lawrence –Slide 25

No. I think that's right. The only thing I would add is I just want to share my bias, which is that I really used to believe before we started doing the landscape scan, I used to believe like, oh, you need a certain scale for this to make sense, or it doesn't make sense if ... If you're not going to house XYZ number of people. And we spoke with Jesse Ferguson in Trinity he really made me a believer. And one of the points that he made was that actually coming from a smaller area, the allocations they get from all these different funding sources are actually smaller than what bigger communities are going to see. So there's the housing acquisition piece that Marc is talking about, and there's this backbone braiding funding piece, which is that when you're working with smaller allocations, it becomes almost more important for you to have these contracting mechanisms to braid them together. And to the person who asked the question, let's connect. Let's talk about what your community looks like. Let's do some thought partnership together about what this could look like in your community.

00:50:25– Alison Klurfeld –Slide 25

There was another question about regional models. That can be a way that if rural areas feel like, "Well, we need scale on this piece of it," if we need scale, the number of staff, for example, who are working with landlords, there might be opportunities to partner. I know for example, in the COC program, sometimes four or five counties or two or three will get together and that can be a really exciting opportunity too. Sorry, back to you.

00:50:49– Glenn Tsang –Slide 25

Thank you. I see some questions in the chat about roles that an organization might take. I think I would point to the paper on that first. It has a pretty good outline describing what a lead entity is, what an operator is, for example. So please just plugging the paper to read the roles and responsibilities of each of the participants. Panel I do see a couple of questions about how Flex Pools interact or relate to COCs and housing authorities. Would you mind spending a little time talking about that relationship?

00:51:31–Alison Klurfeld–Slide 25

Yeah. I think for the housing authority, very often the housing authority is a destination maybe after the Flex Pool and a really important partner to be planning with the beginning. So housing authorities administer among many other things, but administer federal housing vouchers and programs. And they are the ones usually cutting the checks and paying the rent. But a Flex Pool can add something really exciting to those federal programs around getting people in faster to a pool of units. And if the Flex Pool coordinates in the beginning quickly and effectively with the public housing authority, they can make the public housing authority in those programs more successful. First way is if the Flex Pool is going to serve people who have a federal voucher in hand, but no apartment yet. They can connect more, make sure more of those vouchers actually get used.

00:52:20– Alison Klurfeld–Slide 25

And then the second way is often that if someone's on a shorter term subsidy, like a rapid rehousing or transitional rent, but at the beginning, the Flex Pool, the supportive services provider, the lead entity, the operator, everybody's working together to get somebody applying for and connected to the next federal voucher that's coming. Maybe they transition from a subsidy that's administered with the Flex Pool outside of it too. So those are two ways that that can happen. And the biggest thing is talking, talking, talking. Understanding the nitty-gritty of, okay, how exactly do we calculate fair market rent so that we'll have good transition planning? What exactly are we looking for in inspections? All those issues really help to understand.

00:53:04– Glenn Tsang–Slide 25

Thanks Alison. There's another question in the chat. What are the drawbacks of Flex Pools for managed care plans? Does it require taking additional financial risk, etc. Panel would you be able to perhaps talk about the value proposition for managed care plans and describe the connections there?

00:53:25– Alison Klurfeld –Slide 25

I'm the MCP person. I'll take that one too. So it depends. So you asked about drawbacks so I'll give you the negative first and then the positive. So glass half empty. Working with Flex Pools can mean having to administer things sometimes in a more flexible way and be creative about many of the processes by which, for example, managed care plans, process authorizations. I know it's a very heavily regulated space. I'm not saying make DMHC mad. But thinking about can you get authorizations in batches in a different way? Can you work together to have teams do training in different forms that are the same across other payers? Can you think about advanced payments with claiming on the back end to draw down fund instead of retrospective payments? So often some of the challenges of working with Flex Pools are that you have to do your operations differently.

00:54:23–Alison Klurfeld–Slide 25

But having worked in a managed care plan and talking to colleagues who are still there, I know one of the big frustrations that managed care plans can face, especially with the amazing growth of the housing transition navigation services, is that you have lots of people getting housing navigation, but they're navigating to nowhere. Flex pools can really be a game changer for that to make it more possible that you have more placements, more access to subsidies and units so that those housing navigation dollars are much more effective and people's health is able to stabilize much faster once they're actually housed, not only being served. So it's often more work on the admin side, but the benefits from that client placement and client retention are really worth it.

00:55:10– Whitney Lawrence –Slide 25

I do just want to reflect on that too, that that's true for MCPs and that's true for lead entities. One of the things that Flex Pools do is it shifts some of the burden of braiding funds, navigating all these different funding streams. It shifts that from landlords and from participants onto a lead entity. So just to say that that shift isn't just that maybe bearing more administrative burden or being more flexible administratively. That shift, it's not being asked just of MCPs. This is a different way of doing business for all of us. It's not even for the lead entity, let's pretend it's a county. It's not send it out to procure, sign your contract, see you later, can't wait to see what outcomes you come

up with. It's a deep relationship, it's flexibility, it's all of those things. So that we're asking that of MCPs as well as of the lead entities as well.

00:56:09– Marc Trotz–Slide 25

It probably goes without saying that also for an MCP mean you get the security that if you're willing to take the initiative, and in many cases you will have to provide housing with your funds, you have the comfort that you're using a qualified housing agency to get it done and that you're really in partnership with them and you're holding them accountable, they're holding you accountable. So I feel less likely to end up five years from now saying, "Well, how did all of this pan out?" And it was maybe not so wonderfully because it was with a bunch of different organizations with a lot of promises that you didn't have as much direct contact with.

00:57:03– Glenn Tsang–Slide 25

Thank you panel. Appreciate it. Recognizing we just have a little bit of time left. I do want to again plug our Flex Pool's paper to go over different roles but also different types of models too, seeing some questions about can I be a lead entity? Can I be an operator? So that paper will help spell that out and also serve as a resource when trying to approach your local leaders as well too.

00:57:31– Glenn Tsang –Slide 25

So last question that I'll answer myself. So I'm seeing a lot of questions about how do county behavioral health and managed care plans ... What's the intersection here? I think just one thing, I'll just take a step back and just recognize that we know we have a lot of resources that are pushed down through managed care plans, other resources that are pushed down through county behavioral health delivery systems. And to really braid these together, it takes a lot of partnership and collaboration. And I think that's primary objective of the Flex Pool's model that we're trying to lean into. How do we bring those partners together? And I think part of what we're trying to do as well is with the TA effort, is really trying to bridge those gaps. Not just at a state level, but I got Marc, Alison, and Whitney up here really offering themselves to your local level as well. So more information to come on the technical assistance. We will release that information through our normal outlets, including applications, how to enroll in the academy, and so more information to come. So I will probably end it with that. But Whitney, Marc, Alison, any closing thoughts? I know we're right at time.



00:58:55– Marc Trotz –Slide 26

Look forward to working with you.

00:58:56– Whitney Lawrence –Slide 26

Yeah. We look forward to meeting.

00:58:58– Whitney Lawrence –Slide 26

Shoot us an email.

00:59:00–Glenn Tsang–Slide 26

Yes. Thank you everyone for your time and thank you for joining and more to come.
This is just the start.