

**AgeOptions Home Preservation Demonstration Project**  
**Definitions and Standards**  
**Updated 9/14/2023**

**Project Definition**

The Home Preservation Demonstration Project provides person-centered services related to preserving an older adult's housing and/or preventing homelessness. The Home Preservation Demonstration Project has two distinct types of services: **Access** and **Direct Service**.

**Service Definitions**

- I. Home Preservation Access
  - a. See Aging and Disability Resource Network (ADRN) – Options Counseling Service standards (attached).
  
- II. Home Preservation Direct Service
  - a. Eligibility: Any person over the age of sixty whose home is in suburban Cook County. *Note that the older adult is not required to own the home.*
  - b. Unit of service: One person will constitute one unit of service, no matter what type of Direct Service is provided.
  - c. Allowable Goods and Services (see Appendix A) are:
    - i. Required to meet the identified needs of the older adult and/or their primary caregiver to ensure their health, safety, and welfare;
    - ii. The least costly alternative that meets the older adult's identified needs;
    - iii. Not already covered under health or homeowner's insurance policies, Medicare, Medicaid, Community Care Program (CCP), Older Americans Act services and local community services;
    - iv. Fits into one of the following categories:
      1. Home Modifications and Repairs
      2. Other

**Service Standards:**

- I. Home Preservation Access
  - a. See Aging and Disability Resource Network (ADRN) – Options Counseling Service standards (attached).
  - b. Work with homeowners or renters who are struggling to afford their homes or rent by conducting comprehensive screenings for benefits.
  - c. If client is a renter who needs a repair or modification to the home, help client contact landlord to request repair or permission in writing that modifications may be made. If there are landlord issues that arise, connect with legal services.
  - d. Enroll client in any applicable benefits; connect them to other programs or benefits (e.g., weatherization, LIHEAP, Tax Deferral, SNAP, Nutrition programs, Medicaid and Medicare Savings Programs, Veterans, etc.).
  - e. Provide additional care management for complicated issues related to housing.
  - f. If needed, provide referrals to:
    - i. Legal services related to housing (Legal Aid Chicago or Center for Disability and Elder Law).

- ii. Homeless services (Alliance to End Homelessness in suburban Cook County).
    - iii. Older Americans Act services such as chore housekeeping, nutrition, Caregiver services, etc.
  - g. If there is an outstanding need not addressed or not fully addressed by steps **c** through **f** above, coordinate with the local Care Coordination Unit (CCU) to apply Illinois Department on Aging (IDOA) Emergency Senior Services (ESS) funding. CCUs may spend up to \$500. The CCU should follow IDOA’s guidance, including appropriate reporting or submission of receipts, client contribution, estimates and anything else required by IDOA. ESS awards are one-time payments – so there needs to be a plan for sustainability of the home.
  - h. Steps **c** through **g** above must be completed before authorizing Home Preservation Direct Services.
  - i. As you are preparing this, please pay attention to your total costs. If client contribution, the initial \$500 of ESS and maximum Direct Service funds will not fully cover the total costs, please be in contact with AgeOptions and IDOA. You may request exceptions from IDOA for more than \$500 in ESS. The email for ESS is [Ageing.ESS@illinois.gov](mailto:Ageing.ESS@illinois.gov)
    - i. IDOA currently requires CCUs to work with Managed Care Organizations (MCOs) to coordinate the needs of their clients and to file an exception with IDOA before applying this initial \$500 in ESS funds to MCO clients (refer to IDOA documentation for the exact process). For MCO clients, continue to follow ESS guidelines and plan AgeOptions Direct Service funds as if your ESS funds will be approved. Please continue to notify AgeOptions early of this situation in case the MCO and ESS funds are not approved.
- II. Home Preservation Direct Service
- a. Targeting of Services: Direct services should be targeted to persons with annual incomes equal to or less than 200% (double) of the federal poverty level. See table below for FY 2023 levels.

Number of persons in family	FY 2023 Federal Poverty Level	
	Per Year	Per Month
Family of one (1)	\$14,580	\$1,215
Family of two (2)	\$19,720	\$1,643

- b. Service limits: Services are provided on a limited basis. Home Preservation funds are payor of last resort. Once other funds have been applied, Home Preservation Direct Service funds may be distributed up to an average of \$1,000 per client. Clients are eligible for one Direct Service for the FY 2023 and FY 2024 period. Since this is a one-time assist, AGENCY and client should create a plan for how client will pay for expenses in the future.
- c. Program Income: Each person receiving Home Preservation direct services must be provided with an opportunity to voluntarily contribute to the cost of the services; all contributions will be used to expand the Home Preservation program.

- d. Spending Date Obligations: All funds must be obligated by September 30, 2024 and expended by October 30, 2024.
- e. Procurement Requirements: Home Preservation Program agencies may use their own procurement policies and procedures to purchase Direct Services if the policies meet government procurement standards.
- f. Record-keeping requirements:
  - i. The Agency must purchase the goods or services directly or, if applicable, directly pay for bills or invoices, and retain documentation of purchase/service or zero balance bill/invoice.
  - ii. Upon receipt of goods and services, the client must complete and sign a receipt that includes a list of goods and services received or provided, date of receipt, and client name and address. The Agency must receive and retain this form. Agency may create their own receipt based on a template from AgeOptions. Agency may use a similar form from IDOA that shows receipt of goods and services and client signature.
  - iii. If client does not own the home and needs a repair or modification, the landlord or owner must be notified and given the opportunity to repair or modify accordingly. If repair or modification is not landlord responsibility, client must get permission to alter the structure in writing from the landlord. Agency must get a copy and keep it on file.
- g. Data reporting: Agency must enter each report in the Home Preservation online form at <https://forms.office.com/r/KEkDrz8h9b>.

**Subject to Change**

These standards are subject to change.

## **APPENDIX A**

### **Home Preservation Demonstration Project Allowable Goods and Services**

<b>Category</b>	<b>Examples</b>
Home Modifications and Repairs	<ul style="list-style-type: none"><li>• Minor home modifications</li><li>• Minor home repairs</li><li>• Home weatherization</li><li>• Installation of ramp(s)</li><li>• Installation of grab bar(s)</li><li>• Installation or repair of furnace or A/C</li><li>• Installation or repair of alarm system</li><li>• Installation or repair of a doorbell or video doorbell</li></ul>
Other	<ul style="list-style-type: none"><li>• One-time payment of past due bills (utility, telephone, property tax, income tax)</li><li>• Heavy duty cleaning (beyond Chore)</li><li>• One-time money management service to establish a budget and bill paying</li><li>• Moving assistance: transportation to locate or move to a new residence; moving van/truck rental; mortgage or rental payment; temporary hotel stay; security deposit; housing application fees; pest elimination; allergen control; cleaning</li></ul>

### **This is not meant to be an exhaustive list.**

If you have suggestions, or need guidance on whether an expense is allowable, please contact Jason Echols ([Jason.Echols@ageoptions.org](mailto:Jason.Echols@ageoptions.org)) and Laona Fleischer ([Laona.Fleischer@ageoptions.org](mailto:Laona.Fleischer@ageoptions.org)).