

SUPPORTIVE HOUSING PRESERVATION

Tools and Resources to Strengthen Supportive Housing Developments

Housing Washington | October 2026



Speakers

Theresa Tanoury (She/Her))

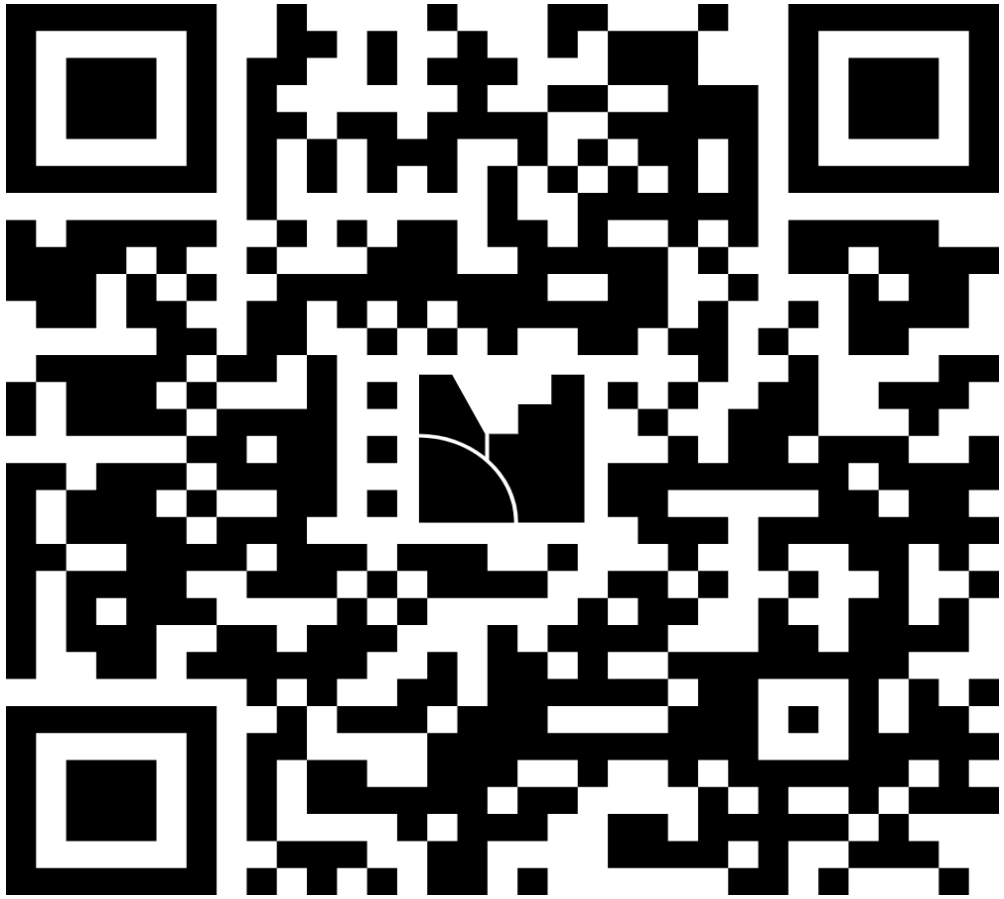
- Senior Program Manager Northwest CSH

Rachel Mokry (She/Her)

- Deputy Director Loan Originations CSH

Phil Fargason (He/Him)

- Sr. Community Investment Officer CSH



or go to www.menti.com
and enter code 6813 1845

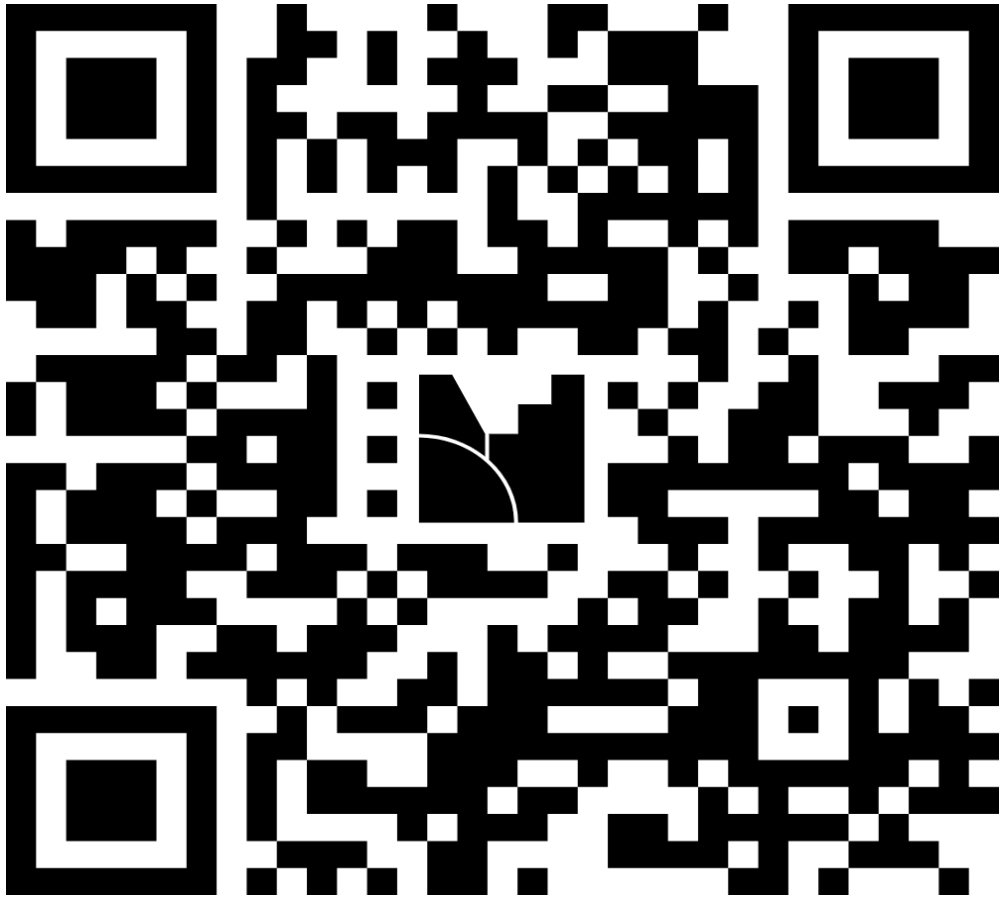
Menti

Tell us about yourself.

Are you a …

A. Developer
B. Service Provider
C. Property Manager
D. Asset Manager
E. Funder
F. Other

Menti

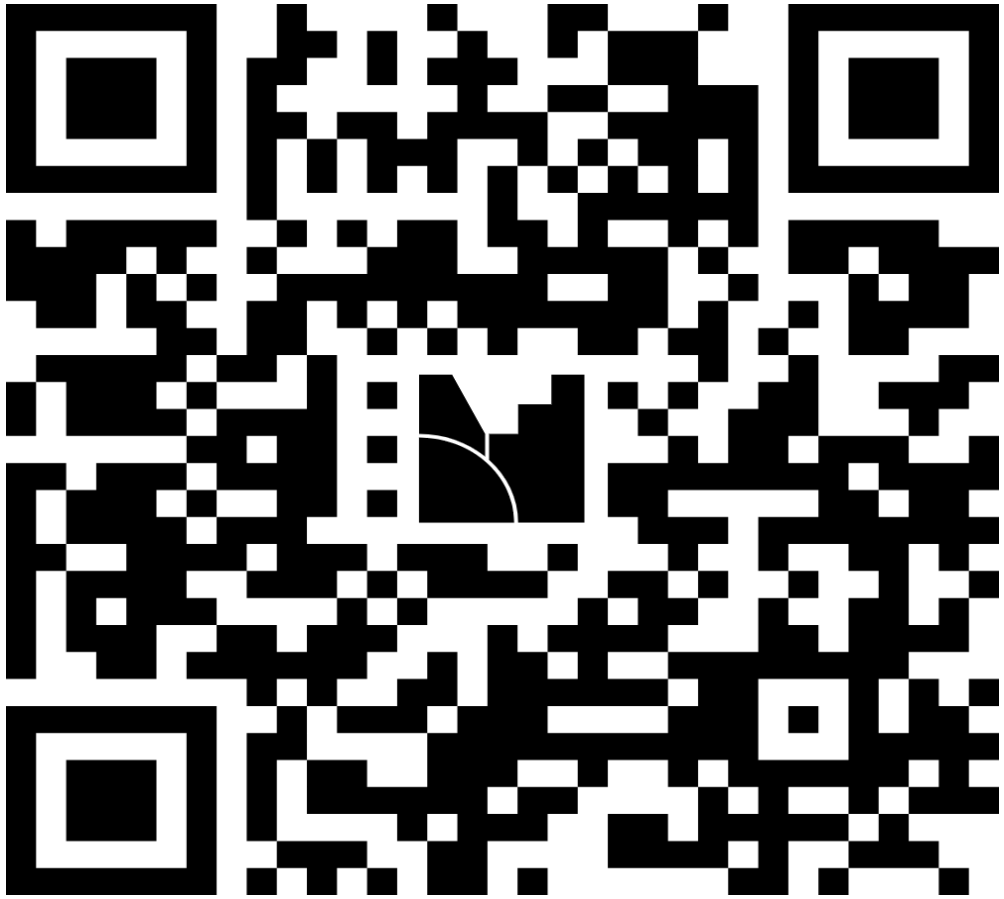


or go to www.menti.com
and enter code 6813 1845

What interested you about this session?

What are you hoping to learn?

Menti



or go to www.menti.com
and enter code 6813 1845

What is your biggest challenge with operating and managing properties?

Agenda

- What is Supportive and Affordable Housing Preservation?
- Deep Dive: Project Assessment Tool (PAT)
- Overview of CSH's PSH Preservation Resources
- Q&A











About CSH

CSH empowers communities to create homes and deliver services that build safe, thriving, and resilient futures. We support affordable housing developers, service providers, and policymakers with the tools, data, and expertise to drive lasting change.

Since 1991, CSH has helped **create or preserve more than 467,000 supportive housing units** for individuals and families exiting long-term homelessness.



CSH

csh.org

What We Do

Policy & Advocacy
We promote evidence-based policies and strategies that advance more supportive housing development.



Community Investment
We are a CDFI and invest resources to increase availability and sustainability of quality, affordable housing aligned with services.

Strengthening the Field
We provide training, technical assistance and thought leadership to the housing and services sectors.

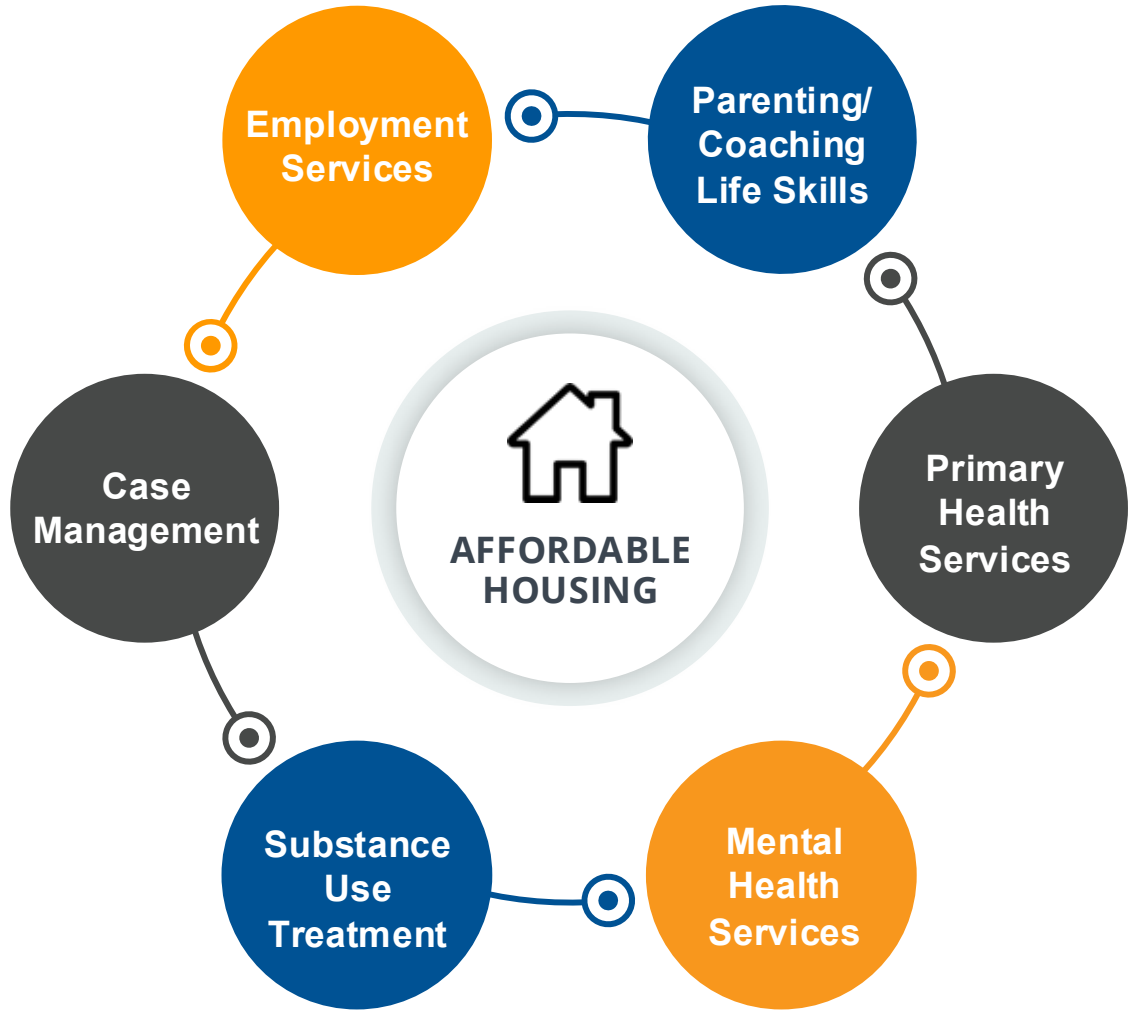
CSH

csh.org

What is Supportive Housing?

With affordable housing at the center, supportive housing connects tenants to services that help them achieve stability, autonomy and dignity.

Housing:
Affordable
Permanent
Independent



Support:
Flexible & Voluntary
Tenant-centered
Coordinated Services

Supportive Housing Preservation – Industry Observations



- Rising costs and funding gaps threaten existing housing and new development
- Demand is increasing with increase in unsheltered homelessness
- Existing properties face widening deficits
- Providers face growing deficits, staffing shortages, and more complex resident needs

CSH

csh.org

Overview of the Project Assessment Tool (PAT)



csh.org

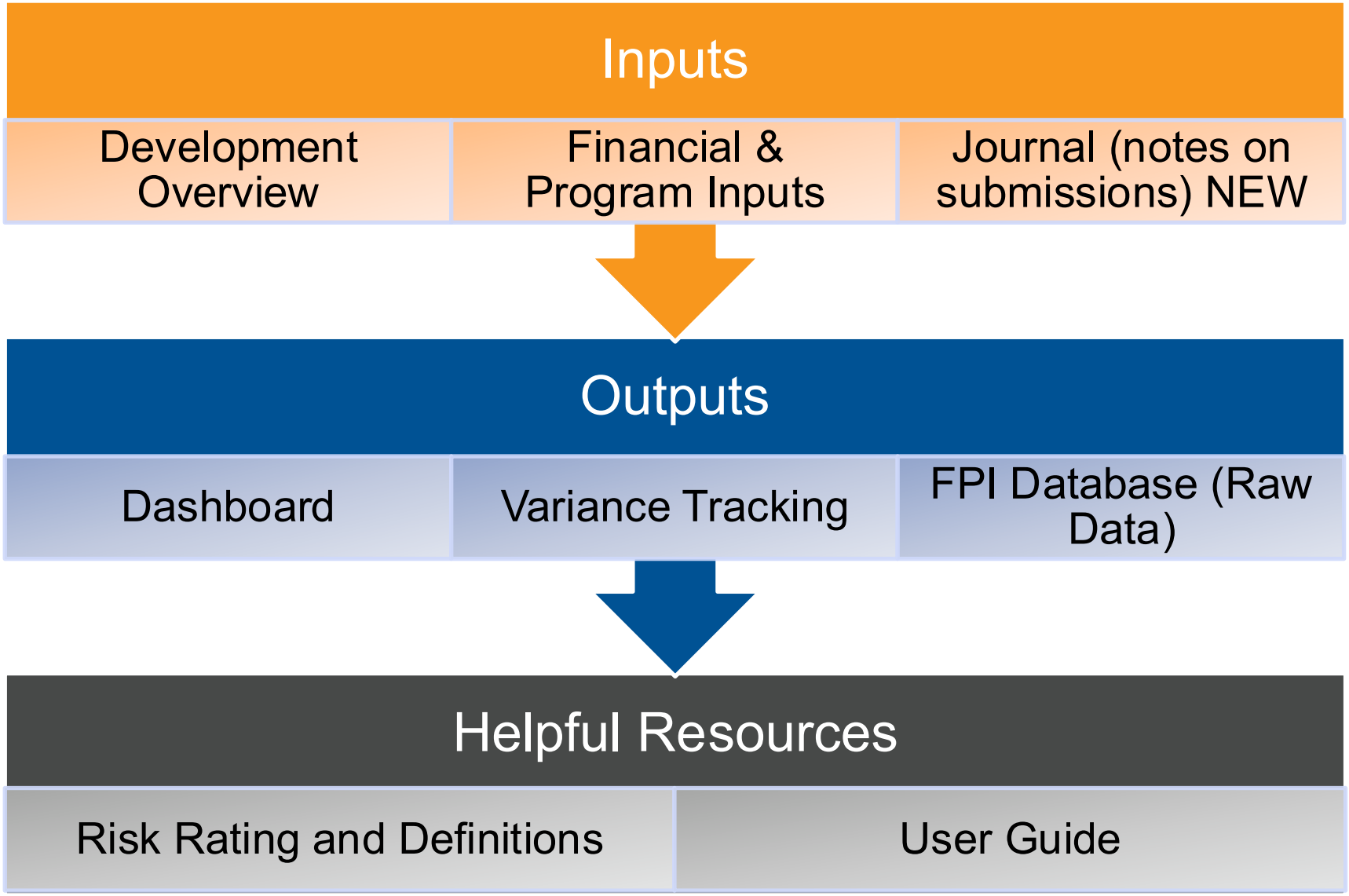
About the Project Assessment Tool (PAT)

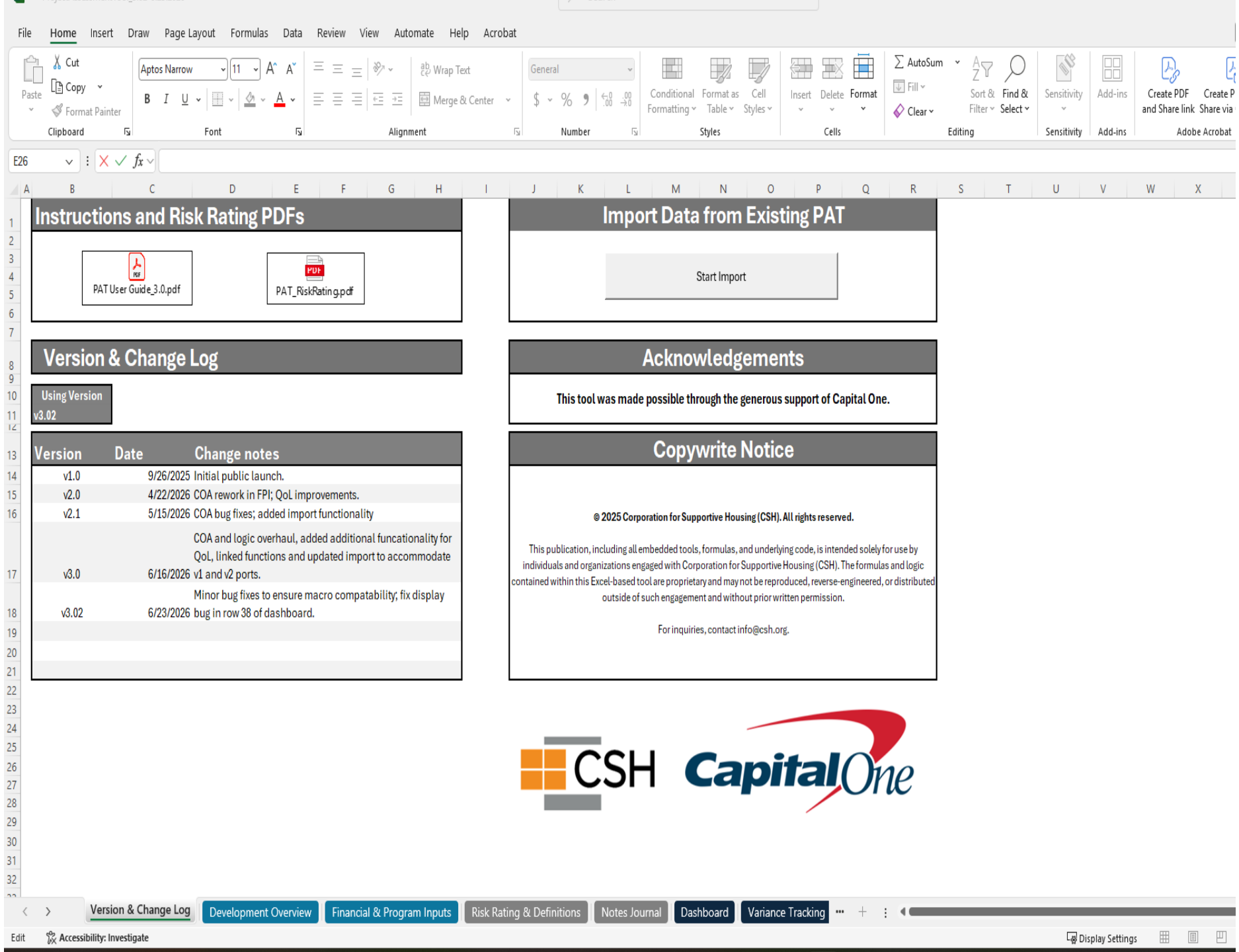
- *What is the PAT?*
  - The PAT is an Excel-based workbook that project owners can assess a project's performance

- *Why?*
  - Assist supportive housing developments through robust asset management analysis

- *Who is it for?*
  - Supportive housing owners who have limited asset management capacity

PAT 3.0 Tabs


Inputs
Development Overview
Financial & Program Inputs
Journal (notes on submissions) NEW
Outputs
Dashboard
Variance Tracking
FPI Database (Raw Data)
Helpful Resources
Risk Rating and Definitions
User Guide


File Home Insert Draw Page Layout Formulas Data Review View Automate Help Acrobat
Cut Copy Format Painter Paste Clipboard
Aptos Narrow 11 Font
Wrap Text Merge & Center Alignment
General Number
Conditional Formatting Format as Table Cell Styles Styles
Insert Delete Format Cells
AutoSum Fill Clear Sort & Filter Find & Select Editing
Sensitivity Add-ins Create PDF and Share link Adobe Acrobat
E26
Instructions and Risk Rating PDFs
PAT User Guide_3.0.pdf
PAT_RiskRating.pdf
Import Data from Existing PAT
Start Import
Version & Change Log
Using Version v3.02
Version Date Change notes
v1.0 9/26/2025 Initial public launch.
v2.0 4/22/2026 COA rework in FPI; QoL improvements.
v2.1 5/15/2026 COA bug fixes; added import functionality
v3.0 6/16/2026 COA and logic overhaul, added additional funcationality for QoL, linked functions and updated import to accommodate v1 and v2 ports.
v3.02 6/23/2026 Minor bug fixes to ensure macro compatability; fix display bug in row 38 of dashboard.
Acknowledgements
This tool was made possible through the generous support of Capital One.
Copywrite Notice
© 2025 Corporation for Supportive Housing (CSH). All rights reserved.
This publication, including all embedded tools, formulas, and underlying code, is intended solely for use by individuals and organizations engaged with Corporation for Supportive Housing (CSH). The formulas and logic contained within this Excel-based tool are proprietary and may not be reproduced, reverse-engineered, or distributed outside of such engagement and without prior written permission.
For inquiries, contact info@csh.org.
CSH
CapitalOne
Version & Change Log
Development Overview
Financial & Program Inputs
Risk Rating & Definitions
Notes Journal
Dashboard
Variance Tracking
Edit
Accessibility: Investigate
Display Settings

Development Overview Inputs

1. Development General Information
2. Development Timeline Summary
3. Building and Unit Summary
4. Financial Summary

Potential Documents Needed

- Financials
- Closing Documents

Development Overview

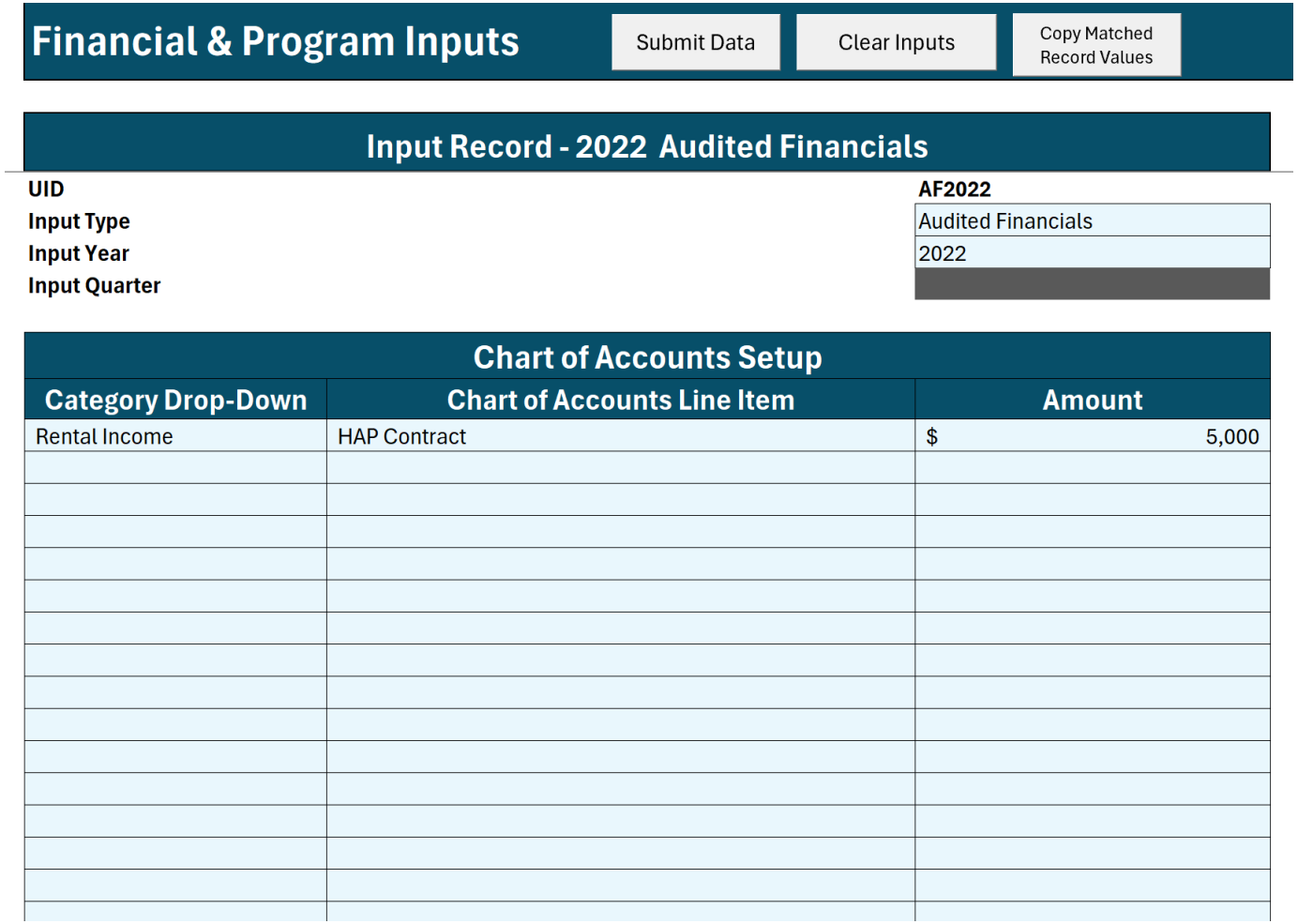
Development General Information

Development Name	Example Development
LP or LLC Name	Example Development, L.P.
Address	
City or Township, State	
Zip Code	
County	
Parcel Number	
LIHTC Type	N/A
LIHTC Allocation Year	
LIHTC Annual Allocation	
Construction Type	Rehabilitation
Number of Buildings	1
Size of Site (acres)	1.9
LP Ownership Interest	99.98%
GP Ownership Interest	0.02%
Qualified Census Tract (QCT)	
Difficult Development Area (DDA)	
HFA Project Number	
Development Stage	Stabilized
Budget Calendar Basis	Fiscal Year
Fiscal Year Month Start	October

Financial & Program Inputs – Types of Submission Forms

Types of Forms

- Quarter Actual
- Audited Financials
- Annual Budget
- Original Projections



Financial & Program Inputs

Submit Data | Clear Inputs | Copy Matched Record Values

Input Record - 2022 Audited Financials

UID	**AF2022**
Input Type	Audited Financials
Input Year	2022
Input Quarter	

Chart of Accounts Setup

Category Drop-Down	Chart of Accounts Line Item	Amount
Rental Income	HAP Contract	$ 5,000

Financial & Program Inputs

Financial

- Standard Chart of Accounts

Program

- Occupancy and Turnover Data
- Supportive Service Data
- Other Project Characteristics

Annual Reporting and Asset Management

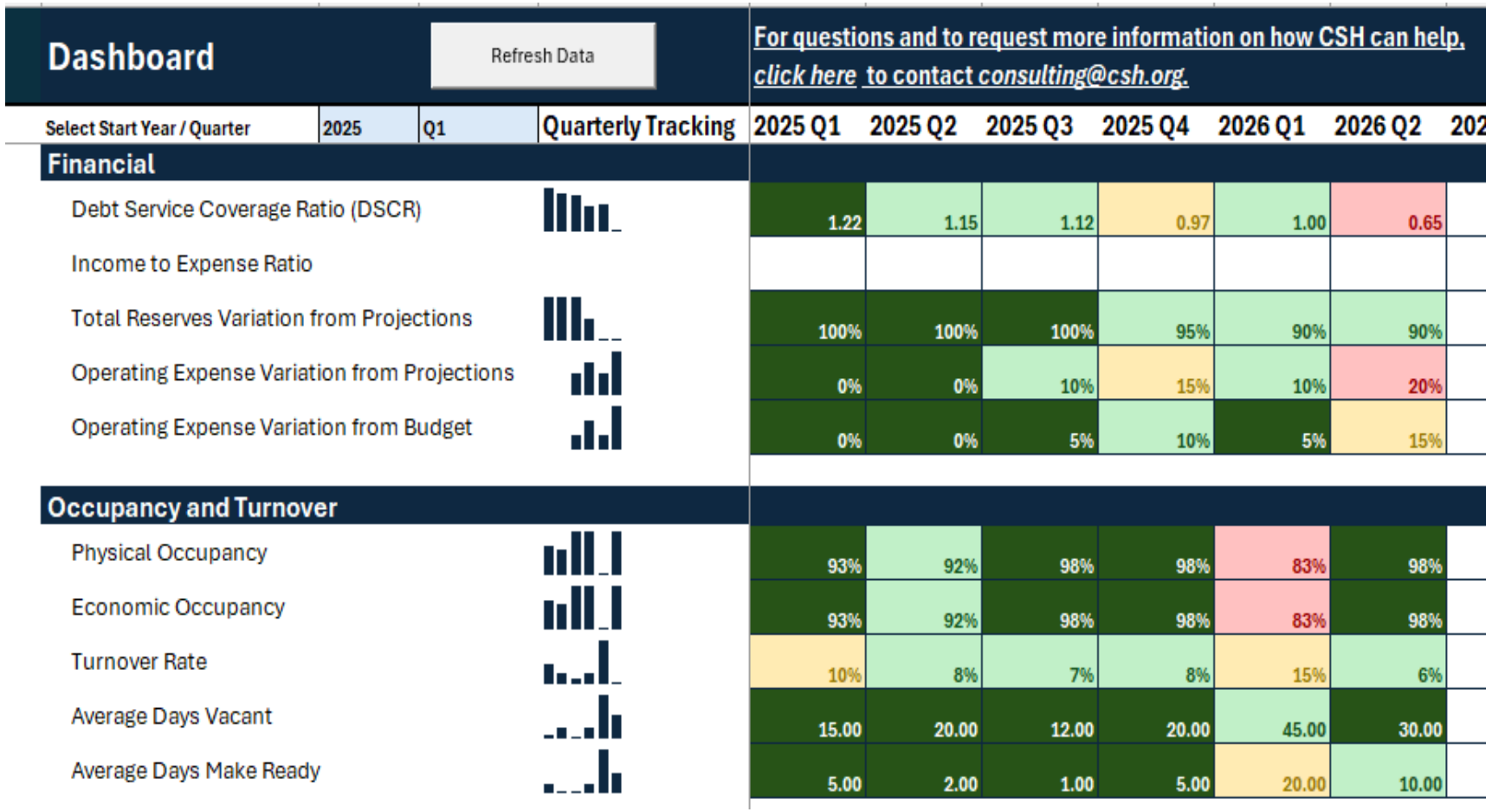
- Funder and Reporting Dates
- Rental or Operating Subsidy Dates
- Annual Reviews and Reporting
- HFA Annual Reporting

Dashboard - Output

User Inputs

Tool Analyzes

Grade Assigned



Dashboard	Refresh Data	For questions and to request more information on how CSH can help, click here to contact consulting@csh.org.						
Select Start Year / Quarter	2025	Q1	Quarterly Tracking	2025 Q1	2025 Q2	2025 Q3	2025 Q4	2026 Q1	2026 Q2	202
Financial										
Debt Service Coverage Ratio (DSCR)				1.22	1.15	1.12	0.97	1.00	0.65	
Income to Expense Ratio										
Total Reserves Variation from Projections				100%	100%	100%	95%	90%	90%	
Operating Expense Variation from Projections				0%	0%	10%	15%	10%	20%	
Operating Expense Variation from Budget				0%	0%	5%	10%	5%	15%	
Occupancy and Turnover										
Physical Occupancy				93%	92%	98%	98%	83%	98%	
Economic Occupancy				93%	92%	98%	98%	83%	98%	
Turnover Rate				10%	8%	7%	8%	15%	6%	
Average Days Vacant				15.00	20.00	12.00	20.00	45.00	30.00	
Average Days Make Ready				5.00	2.00	1.00	5.00	20.00	10.00	

CSH

csh.org

Variance Tracking - Output

Variance Tracking

Refresh Data

	2025 Original Projections	2025 Annual Budget	2025 Audited Financials		
	Amount	Amount	Amount	Proj vs Actual Var %	Budget vs Actual Var %
Income					
	OP2025	AB2025	AF2025	AF2025_OPvar	AF2025_ABvar
Rental Income					
Gross Rental Income - Resident	$ 1,332,648	$ 1,218,407	$ 1,074,124	-19.4%	-11.8%
Insert Description - Rental Income Subsidy 1	$ 618,482	$ 707,739	$ 493,759	-20.2%	-30.2%
Insert Description - Rental Income Subsidy 2					
Insert Description - Rental Income Subsidy 3					
Other Income					
Laundry	$ 5,212	$ 4,476	$ 3,949	-24.2%	-11.8%
Damages					
Commercial Income					
Insert Description - Other Income 1					
Insert Description - Other Income 2					
Vacancy Loss (Cat.)					
Vacancy Loss	$ 146,335	$ 174,425	$ 172,367	17.8%	-1.2%
Effective Gross Income (Total Income minus Vacancy Loss)	*$ 1,810,007*	*$ 1,756,197*	*$ 1,399,465*	*-22.7%*	*-20.3%*

CSH

csh.org

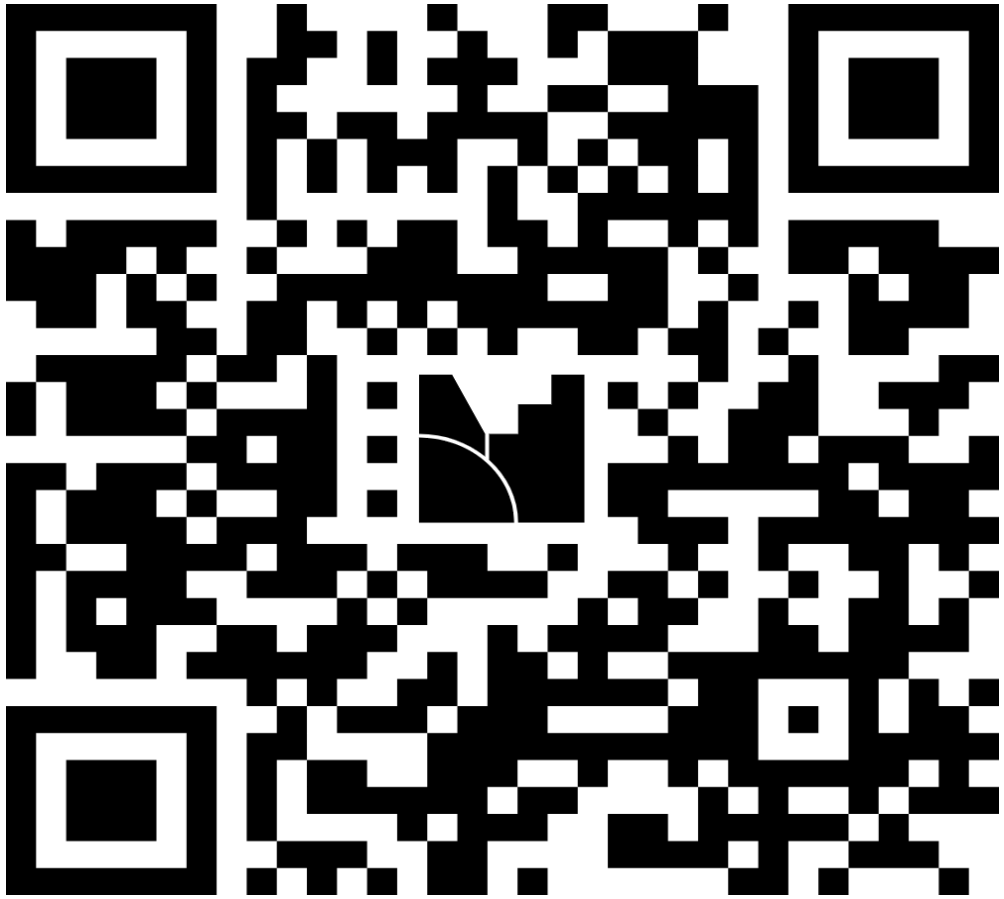
How does the PAT differ from other Asset Management Tools?

- Builds on Affordable Housing Asset Management metrics

- Only tool that specifically incorporates unique supportive housing indicators:
  - Services: value; staff ratios; staff vacancies; etc.
  - Tenant Council
  - Partnerships

- Specifically designed to build the capacity of supportive housing providers to analyze the overall health of a property

Menti



or go to www.menti.com
and enter code 6813 1845

What asset management tools or software do you use?

CSH Preservation Resources



csh.org

Supportive Housing Preservation

We specialize in strengthening and preserving supportive housing projects that have been in operation for several years. Through results-oriented technical assistance, we ensure lasting quality affordable housing through improved financial health, effective operations, and comprehensive services.



We thank Capital One for their generous support of our housing preservation resources

Supportive Housing Preservation Resources

- Preservation Guides
  - How to Access Additional Subsidies for Supportive Housing
  - How to Request Rental Operating Subsidy Increases
  - Supporting Tenants to Make Timely Rent Payments
  - A Case Study – Deborah's Place

- Webinar - Navigating Operational Challenges in Supportive Housing

- CSH Technical Assistance Email: consulting@csh.org

Operations Clinic

CSH Operations Clinic

- ~3-day program designed to boost the sustainability and performance of aging supportive housing properties
- Includes:
  - A pre clinic assessment
  - Focused training and coaching to each team
  - Peer learning with other supportive housing practitioners
  - A clear action plan with next steps to strengthen operations and improve long-term financial sustainability

Q & A

Theresa.Tanoury@csh.org

Rachel.Mokry@csh.org

Phil.Fargason@csh.org



CSH

csh.org

Thank you!

