

# 2025 Financial Management Conference

## Resident Services: Delivery Systems and Business Models

### Speakers:

**Michael Barnes**, CEO, Viva Benefits

**Rachel Munsie**, CEO, Ounce of Care

**Julianna Stuart-Lomax**, Vice President, Community Impact, POAH

**Moderator: Eileen Fitzgerald**, Interim CEO, SAHF

Sept. 17, 2025

**STRENGTHMATTERS**<sup>®</sup>



# Continuing Professional Education (CPEs) Requirements for CPAs

- Please find the **SESSION HOST** to **SIGN IN** at the beginning and **SIGN OUT** at the end of every session. We use that attendance log to verify your participation for CPE credits.
- Please **submit all conference evaluations**. Evaluation links are emailed to registrants daily. The session host monitoring the sign-in process has paper evaluations if you prefer.
- For more information on CPE credits, contact Lindsay Wells at [consult.lwells@gmail.com](mailto:consult.lwells@gmail.com).

# Learning Objectives

- *Explore innovations in resident service delivery.*
- *Discuss a new decision-making framework for which services to deliver, how and to whom.*
- *Identify strategies to reduce expenses while expanding necessary resident support.*

# Poll Question 1 – Show of Hands

In the face of financial constraints, how many of you are doing one or more of the following?

- A. Cutting back your spending on resident services or resident services coordination staffing
- B. Finding new partners or resources that are paying for and providing services
- C. Switching services to virtual platforms in an effort to save money

# Poll Question 2 – Show of Hands

In what program area(s) do you think virtual services are effective?

- A. Eviction prevention
- B. Behavioral or Mental Health services
- C. Other Health Services
- D. Financial Health, Budgeting, Asset Building
- E. Workforce and Skills Training
- F. Youth engagement



## How Viva Benefits helps multifamily owners solve mission-critical problems

Problems we have seen	Solution	Outcomes	Partner	Case Study	References Available
Low Retention (41% per T12)	<b>Viva Benefits Pro Tier:</b> Virtual Benefits + On-Site Resident Engagement	24-point improvement (41% to 65%) sustained over 6 months in 2025			
Compliance and Recertification		Compliance achieved: 1st time in 7 years (88 families with updated files in 31 days)	 		
Financial Resilience through Savings		Families saved more than \$500 on average within 6 months			
Missed Financial Targets: Affects Asset Value, Portfolio		2025: 11.6% increase in NOI + \$3.7M increase in Asset Value			
At-Risk Residents (lacking stability)		30%+ organic adoption of Telehealth + Case Management of At-Risk families			

# Poll Question 3 – Show of Hands

For what populations do you think virtual services are most effective?

- A. Seniors
- B. Families – Heads of Household
- C. Youth
- D. Permanent Supportive Housing Residents

# Poll Question 4 – Show of Hands

Is your organization reluctant to embrace virtual services because of **challenges with reliably available and affordable quality Wi-Fi and/or hardware** (other than phones) in your properties?

- A. Yes
- B. No
- C. Some of the time

# Q&A

- Please ask any questions you have for our speakers.

# Evaluation Reminder

- Please submit all conference evaluations. Use the electronic evaluation link in your email.
- Contact [consult.lwells@gmail.com](mailto:consult.lwells@gmail.com) if you do not receive the link.

# CONTACT INFORMATION

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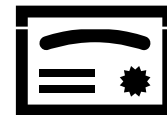
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