

# Diamond Lake

**Minneapolis  
Public Housing  
Authority**

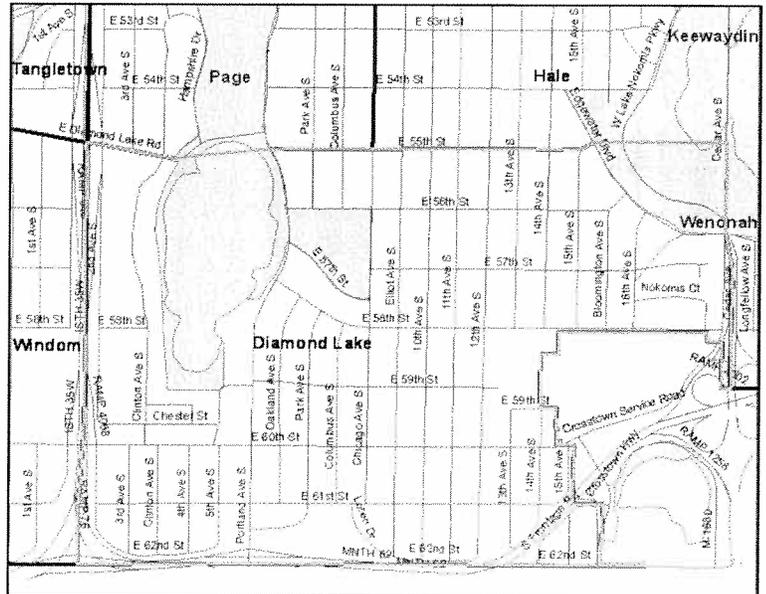
The mission of the Minneapolis Public Housing Authority is to promote and deliver quality, well-managed homes to a diverse low income population and, as a valued partner, contribute to the well-being of the individuals, families, and community we serve

Fall 2010

Version 1

## The Diamond Lake Neighborhood

The Diamond Lake neighborhood, on the south side of Minneapolis, is bounded by 55th Street East and East Diamond Lake Road on the north, Highway 62 on the south, Interstate Highway 35W and Second Avenue South on the west and Highway 77 and Cedar Avenue on the east.



## Employment Resources & Libraries

### Hale-Page-Diamond Lake Community Association

5144 13th Avenue South  
Minneapolis, MN 55417  
(612) 824-7707  
www.hpdl.org

**Minnesota Workforce  
Employment Center**  
777 East Lake Street  
Minneapolis, MN 55407  
(612) 821-4000

**Employment Action  
Center**  
1006 West Lake Street  
Minneapolis, MN 55408

**Employment Action  
Center**  
900 20th Avenue South  
Minneapolis, MN 55404

**Twin Cities RISE!**  
800 Washington Avenue N  
Suite 230  
Minneapolis, MN 55401  
(612) 338-0295

**Washburn Library**  
5244 Lyndale Avenue  
Minneapolis, MN 55419  
(952) 847-8375

**Linden Hills Library**  
2900 West 43rd Street  
Minneapolis, MN 55410  
(952) 847-2825

**Roosevelt Library**  
4026 28th Avenue South  
Minneapolis, MN 55406  
(952) 847-2700

**Hosmer Library**  
347 East 36th Street  
Minneapolis, MN 55408  
(952) 847-2900

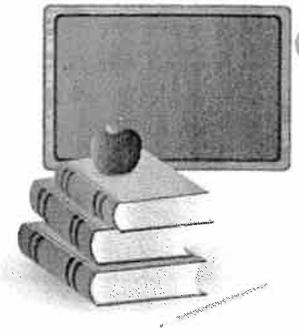
## Public Schools

Families in Minneapolis have the option to send their children to the community (neighborhood) school or to a magnet school located in their attendance area. The Minneapolis Public Schools website is a great resource to learn more about the types of schools available for your family and encourages you to visit schools before requesting one for your child(ren).

### Community Schools in the Attendance Area:

- Hale/Field Community School (K-4)
- Field/Hale Community School (5-8)
- Anthony Middle School (6-8)
- Washburn High School (9-12)

\*Please go to <http://www.mpls.k12.mn.us/> for a list of magnet and expanded school options.



### Student Placement Services

1250 West Broadway  
Minneapolis, MN 55411  
(612) 668-1840

## Parks and Recreation Centers



There are a variety of youth activities available in your neighborhood. A great place to check out events and sports league signups is at your local recreation center:

**Pearl Recreation Center**  
414 East Diamond Lake Road  
Minneapolis, MN 55419  
(612) 370-4906

The Minneapolis Youth Coordinating Board (YCB) is another great resource for youth activities. Please call **(612) 673-2060** or visit <http://youth.ycb.org> to see an updated calendar of events and sign up for the Youth Bus that will take you to activities throughout Minneapolis!

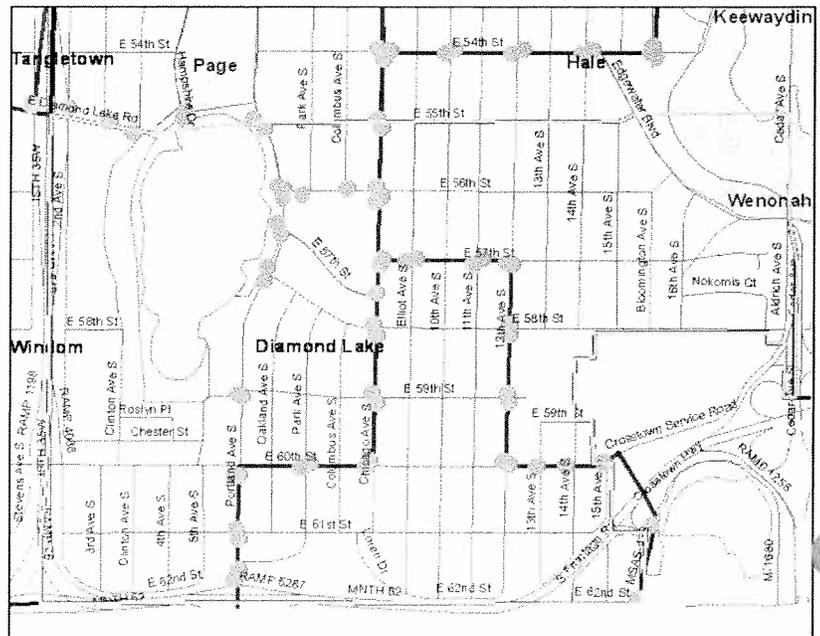
More information about parks and recreational activities throughout Minneapolis is available by calling the Lakes District at **(612) 313-7718** or by visiting [www.minneapolisparcs.org](http://www.minneapolisparcs.org)

## Transportation and Retail

The Diamond Lake neighborhood is served by several Metro Transit bus lines: 5, 14, and 111.

### Legend

- Shopping Mall
- Clinic
- ★ Grocery Store
- ⊠ Hospital
- ⊕ Pharmacy
- △ Retail
- Bus Stop
- Bus Route
- ⊞ Park and Ride



## Afterschool Programs

There is an abundance of afterschool programs for children throughout Minneapolis. In addition to Minneapolis Public Schools' Minneapolis Kids Program and the Minneapolis Parks and Recreation Board's RecPlus Program, other organizations have afterschool programs. Please note that this list does not include every organization that has an afterschool program, but rather a sampling. You are strongly encouraged to look for the afterschool program that is most appropriate for your children.

Organization Name and Contact Information	Location(s)	
Minneapolis Parks and Recreation Board's RecPlus School Year Program (612) 230-6400 <a href="mailto:recplus@minneapolisparcs.org">recplus@minneapolisparcs.org</a>	Bottineau, Brackett, Bryant Square, Fuller, Hiawatha School, Keewaydin, Kenwood, Linden Hills, Lynnhurst, Matthews, McRae, Pershing, Sibley, Van Cleve, Waite, Webber	
Minneapolis Parks and Recreation Board's RecPlus Summer Program (612) 230-6400 <a href="mailto:recplus@minneapolisparcs.org">recplus@minneapolisparcs.org</a>	Armatage, Bottineau, Brackett, Bryant Square, Fuller, Hiawatha School, Keewaydin, Kenwood, Linden Hills, Matthews, Nokomis, Pershing, Sibley, Van Cleve, Waite, Webber	
YMCA <a href="http://www.ymcatwincities.org">www.ymcatwincities.org</a>	Downtown YMCA 30 South 9th Street Minneapolis, MN 55402 (612) 230-9622	
Boys and Girls Clubs of the Twin Cities 6500 Nicollet Avenue South Suite #201 Minneapolis, MN 55423-1674 (612) 435-1900 <a href="http://www.boysandgirls.org">www.boysandgirls.org</a>	Jerry Gamble Club 2410 Irving Avenue North Minneapolis, MN 55411 (612) 522-3636  Southside Village Club 701 East 39th Street Minneapolis, MN 55407 (612) 822-3191  Olson Beacon Club 1607 51st Ave N. Minneapolis, MN 55430 (612) 668-1640	Patrick Henry Beacon Club 4320 Newton Avenue North Minneapolis, MN 55412 (612) 668-2000  Little Earth 2495 18th Avenue S. Minneapolis, MN 55403 (612) 455-2187
Minnesota 4-H	Hennepin County Amie Mondl <a href="mailto:rober199@umn.edu">rober199@umn.edu</a> (612) 596-2115	Urban 4-H Erica Gates <a href="mailto:gates015@umn.edu">gates015@umn.edu</a> (612) 624-7603
Girls Incorporated at the YWCA of Minneapolis <a href="http://www.girlsinc.org">www.girlsinc.org</a>	1130 Nicollet Mall Minneapolis, MN 55403 (612) 215-4375	

<p>Minneapolis Police Activities League (PAL)</p>	<p>4119 Dupont Avenue North Room 132 Minneapolis, MN 55412 (612) 673-3953</p>	
<p>Minneapolis Public Schools' Minneapolis Kids Program 1006 West Lake St. Minneapolis, MN 55408 (612) 668-3890 <a href="mailto:mpls.kids@mpls.k12.mn.us">mpls.kids@mpls.k12.mn.us</a></p>	<p>Armatage, Bancroft, Barton, Bryn Mawr/Parkview, Burroughs, Dowling, Field, Hale, Jefferson, Kenny, Lake Harriet Lower Campus, Lake Harriet Upper Campus, Lyndale, Marcy Open, Pillsbury/Bottineau, Pratt, Ramsey, Wenonah, Whittier</p>	
<p>Parents in Community Action, Inc. (612)-374-8309 <a href="http://www.picaheadstart.org">www.picaheadstart.org</a></p>	<p>Donald M. Fraser 700 Humboldt Avenue N Minneapolis, MN 55411 (612) 377-7422</p> <p>Glendale 96 St. Mary's Avenue SE Minneapolis, MN 55414 (612) 874-7422</p> <p>McKnight 4225 3rd Avenue S Minneapolis, MN 55409 (612)-825-7422</p>	<p>Northeast 342 13th Avenue NE Minneapolis, MN 55413 (612) 379-7422</p> <p>Park Place 2745 Park Avenue S Minneapolis, MN 55407 (612) 870-7422</p> <p>Portland Village 1829 Portland Ave S Minneapolis, MN 55404 (612) 871-7422</p>



**CHA's Work Requirement and Workforce Development Opportunities**

**Developing Effective Employment and Self-Sufficiency Incentives**

**2010 MTW Conference**

**June 2-4, 2010**

## Agenda

- Plan for Transformation Overview and Update
- Employment and Self-Sufficiency Initiatives:
  - Public Housing Work Requirement
  - Workforce Development Opportunities

## The Plan for Transformation

- Goals:
  - Reintegrate families and housing
  - Improve the quality of affordable housing
  - Provide opportunity for CHA residents to better lives
  - Spur the revitalization of communities dominated by CHA developments
  - 25,000 new and rehabbed housing units
- Unit Delivery Progress as of 4/30/10:
  - 72% through the Plan, more than 17,900 units delivered
  - Senior rehab 98% complete
  - Scattered site rehab goal 100% complete
  - Family housing rehab 66% complete
  - Mixed-income public housing 39% complete
- Occupancy as of 3/31/10:
  - 15,816 households in family, scattered site, mixed-income, and senior public housing
  - 37,605 HCV households

## Before and After



## Public Housing Work Requirement

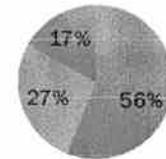
- On January 1, 2009 CHA implemented a Work Requirement for all public housing residents between the ages of 18 to 62.
- Any household member who is 17 years of age and not attending school full-time, is also subject to the policy.
- The policy requires adult household members to be engaged in some activity for at least 15 hours each week for the first year of implementation, and 20 hours per week thereafter.
- The work requirement may be met through a verified combination of:
  - Employment; attendance at an accredited school, institution, training program, job readiness, GED or literacy programs; and Internship or work experience (transitional jobs, subsidized work programs); as well as
  - Volunteer or community service, for up to 50% of the requirement for the first 3 years of implementation.
- Residents may request a 90-day Safe Harbor from the Work Requirement if they are unable to comply with the policy, but can demonstrate they are working to meet it.
- CHA's Case Management and Workforce Development Programs are available to assist families in their transition to economic self-sufficiency.

## Work Requirement Outcomes

- After 1 year of implementation, 91% of residents are compliant, exempt or qualify for Safe Harbor:

- 44% Compliant
- 28% Exempt
- 19% Safe Harbor
- 9% Non-Compliant

### How Are Residents Complying?



- Working
- In School or training
- Combination of Work, School, and Volunteer

## Resident Services at a Glance

- |  |  |   |
|--|--|---|
| <p><b>Case Management and Housing Counseling Assistance</b></p> <ul style="list-style-type: none"> <li>• FamilyWorks</li> <li>• CabriniWorks</li> <li>• Westhaven Engagement Program</li> <li>• Relocation and Housing Counseling</li> </ul> <p><b>Workforce Development Services and Supports</b></p> <ul style="list-style-type: none"> <li>• Basic job training and placement services</li> <li>• Bridge Programs</li> <li>• Career and Technical Education at City Colleges</li> <li>• Transitional Jobs</li> <li>• Opportunity Chicago</li> </ul> | <p><b>Children and Youth Services</b></p> <ul style="list-style-type: none"> <li>• After School Programming</li> <li>• Summer Opportunities - Camps and Jobs</li> <li>• Dual Enrollment program with City Colleges</li> <li>• Scholarships</li> <li>• Links to Early Care and Education programming (Child Care, Head Start &amp; Pre-K)</li> <li>• Recreation Activities at the Chicago Park District</li> <li>• Operation Warm Coat Give Away</li> </ul> | <p><b>Other Supports</b></p> <ul style="list-style-type: none"> <li>• Substance Abuse Treatment</li> <li>• Utility Assistance</li> <li>• Transportation</li> <li>• Workforce Clothing/Uniform Assistance</li> <li>• Good Neighbor Workshops</li> <li>• Assistance Finding Child Care</li> </ul> |
|--|--|---|

## Workforce Development Opportunities for Residents

- Through CHA's Resident Services division, residents are able to participate in opportunities for education, training, and work experience that assist them on the path to gainful employment and also in complying with the work requirement.
- Job Readiness Training and Placement/Retention Services
- Occupational Skills Training through Community-Based Organizations and other providers
- Education: Through an IGA with City Colleges of Chicago, CHA provides technical skills training, bridge programming and adult literacy classes to residents at no cost. Residents are able to take a variety of degree and certificate programs in industries such as hospitality; Transportation, Distribution and Logistics (TDL); and healthcare.
- Transitional Jobs Programs- a strategy for residents with multiple barriers to employment

## Workforce Development Outcomes: 2008-March 2010

- Job Placements through FamilyWorks (non-TJ placements)
  - 2,199 placements for 1,823 residents
    - 30-day retention: 1,741
    - 60-day retention: 1,544
    - 90-day retention: 1,429
    - 180-day retention: 1,257
- City Colleges Certificate/Training programs: 690 residents enrolled since 2008; 477 residents completed a program
- Other Employment/Occupational Skills Training programs– 1,001 have enrolled since 2008; 464 residents completed a program; 174 are currently enrolled
- 546 residents have enrolled in post-secondary education (2-4yr degree) programs through City Colleges and other institutions

## Transitional Jobs Programs: Strategy for Residents with Multiple Barriers

- Transitional Jobs (TJ) programs offer unique opportunities that would not be available through existing services. Participants receive paid training and on the job experience in preparation for entering the workforce.
- TJ programs use time-limited, wage earning jobs (subsidized) that combine real work, skill development, and supportive services to transition participants successfully to unsubsidized positions.
- The TJ model has proven successful on a national and local level to provide work experience for participants with little or no job history.
- Resources:
  - Partnership for New Communities: [www.thepartnershipfornewcommunities.org](http://www.thepartnershipfornewcommunities.org)
  - National TJ Network: [www.heartlandalliance.org/ntjn/](http://www.heartlandalliance.org/ntjn/)

## CHA's TJ Programs:

- Since 2008, CHA has offered Transitional Jobs programs to residents through CHA, the city of Chicago, and philanthropic-funded programs.
- TJ providers follow a program model consisting of the following elements:
  - job readiness and basic skills training
  - placement in paid subsidized employment (typically 4-6 months)
  - placement in unsubsidized employment
  - employment retention services (coordinated with case management agencies)
- TJ providers may also offer one or more unique program components including contextualized literacy programming, customized skills trainings and technical skill development.

## CHA's TJ Programs Outcomes: 2008-March 2010

- 698 residents have participated in Transitional Jobs programs through CHA contracts and other providers. Of these residents:
  - 265 (of 698) have needed more than one TJ placement (subsidized or unsubsidized)
    - Major Industry Sectors to date: Administrative/Clerical/Office; Retail; Customer Service; Janitorial; Hospitality and Tourism.
  - 90% (625) have retained their subsidized/unsubsidized position at least 30 days
  - 433 (of 698) have completed a subsidized placement

## CHA's TJ Programs Outcomes: 2008-March 2010

- 418 (of 698) residents have transitioned to unsubsidized jobs
  - 93% (387 residents) stayed in their unsubsidized placement for at least 30 days
  - 56% (233 residents) stayed in their unsubsidized placement for 180 days or more
  - 78% (327 residents) are currently still employed in their unsubsidized placement

## Lessons Learned

- TJ programs:
  - Help participants manage barriers that often prohibit successful employment
  - Provide a greater opportunity for participants to earn higher wages
  - Enable participants to comply with CHA's work requirement
- The intensive nature of TJ programs has proved to be valuable by keeping residents engaged in the program.
- While funding for TJ programs is more costly than traditional workforce development programs, individuals who have multiple barriers to the workforce often do not meet enrollment criteria for those programs.

## Questions?

Linda J. Kaiser  
Executive Vice President  
Resident Services  
Chicago Housing Authority  
312-935-2620  
[lkaiser@thecha.org](mailto:lkaiser@thecha.org)

**Self-Sufficiency =**  
*I am in charge of my choices  
and want to be successful*



**PROMOTING  
SELF-SUFFICIENCY  
BY ENCOURAGING  
SELF-ACTUALIZATION  
AND AN INCREASED  
SENSE OF CONTROL**

**Carrie Lindsey**  
Director of Resident Services

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**Sticks & Carrots**

**Mandatory Work Requirement**

- All non-disabled/non-elderly adults age 18 and over must work at least 15-20 hours a week. Full time enrollment in a job training or post-secondary education program meets the work requirement. A two parent household can satisfy the work requirement when one parent works 35 hours a week.



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**Sticks & Carrots**

**No Time Limit  
Training & Education Focus**

- Employment Center with five computers for public use
- Employment focused workshops and computer training
- Assistance enrolling in education/training programs
- Tutoring for all students



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**Getting Started**

*What can you do today?*

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**WE FOCUS ON GETTING BUY-IN FROM TENANTS. WE CANNOT ALWAYS FIX THE PROBLEM BROUGHT BY THE PERSON WHO WALKS THROUGH THE DOOR.**

**BUT WE CAN TRY TO MAKE SURE THAT THEIR DAY IS A LITTLE BETTER THAN IT WAS WHEN THEY CAME IN. IN THE LONG RUN, WE WANT TO CREATE BETTER TENANTS AS WELL AS A WAY TO SELF-SUFFICIENCY.**




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*We address barriers with a thorough questionnaire that allows staff to not only identify barriers and have those difficult conversations but also affect an opportunity to find areas in which there might be an easy fix.*

**Barrier Analysis – 53 questions to spark dialog & get the big picture**

- ✓ What three personal or professional achievements are you most proud of?
- ✓ What are your weaknesses and how do they challenge you?
- ✓ What skills are you proficient at that you are willing to share with a new employer, if we can make it possible for you to do so?
- ✓ When was the last time you saw a dentist?
- ✓ Can you provide a clean UA today?
- ✓ Is it your goal to find employment? If yes, on a scale of 1-10, how would you rank your desire to find employment?
- ✓ Do you have a suspended Driver's License?




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*After the barrier analysis is completed, we begin to focus on their own career path and the steps that it would take to get to the end of the path. Many people don't understand setting goals, but some people are no different and may understand the process even less. They live on a 30-day cycle, created by dependency on welfare or living pay check to pay check. When they cannot see past the next financial crisis.*

**SMART GOALS**

S=set a specific goal  
 M=set a measurable goal  
 A=set an actionable goal  
 R=set a realistic goal  
 T=set a time-based goal



**Refocusing on the future**

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One of the first exercises we ask the teams to do is to pick something they want to have in five years. This can be a car, a house, a job, a college degree, in one case a graduation party for their child. The exercise after that is to ask the question "what does it take to get to this point." Then we have them work their way backwards: if you want this in five years, what has to be happening in three years, one year, six months, 3 months, tomorrow, now?

**"What do you want to do in 5 years?"**

3-years  
1-year  
6 months  
3 months  
1 month  
Today




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**Meaningful Long-Term Employment**

**WE OFFER INNOVATIVE PROGRAMMING AND SERVICES THAT ARE NOT ALWAYS DIRECTLY TIED TO EMPLOYMENT.**




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**Skill Acquisition & Programming**

Women's Writing Workshop	Men's Groups
<ul style="list-style-type: none"> <li>In collaboration with two women, a local poet and junior high English teacher, we have offered a Women's Writing Workshop since 1999 as a way for women to obtain a sense of pride and control through creative endeavor. And it improves their writing skills.</li> </ul> 	<ul style="list-style-type: none"> <li>In 2004 it became clear that we were serving more men who were single parents or heads of households. We began incorporating programming targeted towards men.</li> </ul> 

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## 2009 -2010 Employment Programming

- Career Coaching Club
- Bus Routes Training
- Resume Writing
- Personal Vision of the Futures
- Finding a Job in 2009
- Technical Writing Parts 1 & 2
- Employment Networking
- Job Retention
- Employment Center Open House
- Work Investment Act Eligibility Session
- Women's Self-Awareness Health Talk
- Women's Writing Workshop
- Registered Apprentice Program Workshop

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## Flexible but demanding

Resident services is a child friendly environment.

- Residents who are mandatory sign a contract.
- We never allow lack of child care as a reason to not come in.
- We offer bus passes and have two vans to provide transportation when needed.

Non-compliance is addressed swiftly and with consequence.



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## Education and Training Focused



NEOSHO COUNTY COMMUNITY COLLEGE  
We are the heart of the community.



KU  
KANSAS

Microsoft

Heartland Works



HASKELL INDIAN NATIONS UNIVERSITY

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**Technology Based**



- Computer & Internet Access
- Computer based job search
  - Resumes
- Writing for employment
  - Word Processing
- Computer Skills Workshops

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**Paid Training**



- Certified Nurse & Medication Aide
- Microsoft Office Certifications
- Paid training positions in the Resident Services Office
- Hiring tenants when possible

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**Whole Person, Whole Family**



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### Health & Wellness



*In the barrier analysis we ask about mental, dental and physical health and assist the tenants in addressing these barriers that inhibit full employment. We offer services that include counselling, fresh produce giveaway and exercise programs that serve to keep a focus on overall health and wellness.*

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### Youth Services



*The Full Circle program, in collaboration with community-based agencies and individuals, serves as a year round out of school program that provides a free, safe and positive place for youth, ages 7-15, receiving housing assistance to spend time in a constructive manner and avoid educational regression. Services focus on out-of-school learning, self-development and mentoring through programming based on participants as unique individuals. This innovative approach allows us to make meaningful connections and provide otherwise unobtainable experiences to low-income youth.*

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### Collaboration



**WE UTILIZE PARTNERSHIPS TO GET THE BEST SERVICES POSSIBLE FOR OUR TENANTS. WE CURRENTLY WORK WITH OVER 54 DIFFERENT PARTNERS.**

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### Partner Agencies



Ballard Center Bert Nash Mental Health Center Capital City Bank Christian Psychological Services DCCCA DG County Senior Services ECKAN Einstein Brothers Girl Scouts Habitat for Humanity Housing & Consumer Credit Counseling Health Care Access Independence Inc. Just Foods KS Social Rehabilitation Services K-State Research and Extension	KU Educational Opportunity Center Lawrence Arts Center City of Lawrence Lawrence Douglas County Health Department Lawrence Community Theater Lawrence Memorial Hospital Lawrence Public Library Leo Center Salvation Army The Shelter St. Claire Center (St. John's) Success by Six Tenants to Homeowners Write where you are
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### Youth Programming Partners



AmeriCorps VISTA Boy Scouts ECKAN Computer Diagnostic Repair Douglas County Red Cross GaDuGi Safe Center Girl Scouts K-State Research and Extension KU Educational Opportunity Center Lawrence Arts Center Lawrence Community Theater Lawrence Memorial Hospital Lawrence Parks and	Recreation Department Lawrence Public Library The Lawrence Youth Ensemble The Shelter Unified School District 497 Van Go Mobile Arts Roger Hill Volunteer Center
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### Employment Affiliates 2009-2010



Lawrence KS Chamber of Commerce Lawrence Small Business Association Jayhawk Chapter Society for Human Resource Management KS Dept of Commerce Heartland Works and the Lawrence Workforce Center Neosho Community College Allied Health Program Trinity In-Home Care La Costa Staffing Express Staffing Sedona Staffing Lawrence Memorial Hospital USD 497 Connex Hawk Wash Shamrock Tree Service Lawrence Journal World The City of Lawrence SRS/Vocational Rehabilitation
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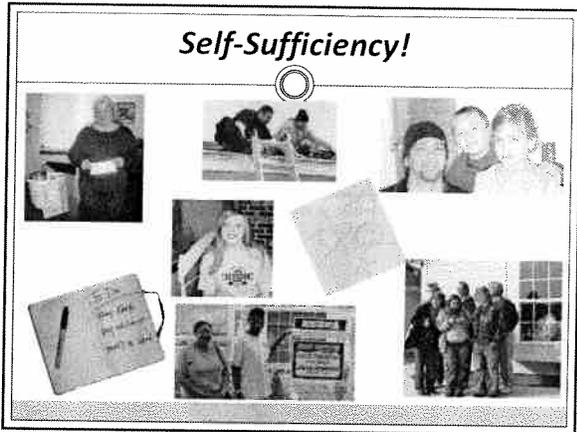
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**HOUSING AUTHORITY OF BALTIMORE CITY (HABC)**  
**Creating UFAS Accessible Units with MTW Flexibilities**  
**June 2, 2010**

**Amy Wilkinson, Associate Executive Director for FHEO Enforcement**  
**Charles M. Aquavella, Associated Director of Engineering & Capital Improvements**

**A. Overview Bailey Consent Decree UFAS Requirements**

1. 586 Public Housing Units
2. 30 Scattered Site Units
3. 19 Section 8 Project Based Units
4. 120 New Construction Units
5. 75 Near UFAS Compliant Units
6. 283 Hearing Vision Units

**B. UFAS Units**

Section 504 of the Rehabilitation Act of 1973 requires that projects funded by certain federal funds make at least 5% of the units or one unit, whichever number is larger, compliant with the Uniform Federal Accessibility Standards (UFAS) for mobility accessibility and 2% of the units compliant with the UFAS hearing vision requirements.

**C. Near UFAS Compliant Units**

The Bailey Consent Decree allows HABC to create 75 units that do not have to conform to certain UFAS dimensional tolerances, specifically: “Dwelling units may vary from compliant dimensions in design by up to (and no more than) 1” (one inch).....”

**D. Addressing Complications Created by Thompson Partial Consent Decree**

1. Prohibition Against New Public Housing Units in Impacted Areas – The Thompson Partial Consent Decree prohibits HABC from constructing new public housing and acquiring existing properties and rehabbing them for public housing in Impacted Areas, which are specific census tracts listed in the partial consent decree that were determined based on the level of poverty, percentage of African Americans and assisted housing in them.
2. Long Term Affordable Units – To enable HABC to create new construction UFAS units in Baltimore City, the Bailey Consent Decree provides that HABC may create units that are long term affordable housing units, which are “housing units that are affordable ... and shall remain affordable for a minimum of forty (40) years. These units are the equivalent of public housing and, for purposes of this Decree, constitute

long term affordable housing units only if the households residing in them receive any and all rights, privileges, and benefits that are provided to HABC's public housing residents or applicants."

**E. Creating the UFAS Units – Rehabbing Existing Units**

- 1. Background:** Since 2005 HABC has created 608 UFAS units (577 UFAS units at its existing developments, 26 scattered site units and 5 new construction units). In addition to the 608 UFAS units, HABC has created 73 near UFAS-compliant units.

HABC has a balance of 147 UFAS units to be created primarily in its new development projects (in excess to the minimum 5% requirement).

In addition, HABC is in the process of creating an additional 14 scattered site units using ARRA funds.

- 2. Creating the UFAS Units – Rehabbing Existing Units:**

Before a design can start the following must be determined:

- a. Bedroom type.** The number of UFAS units in each bedroom size will generally be determined based on your waiting list. Once this quantity is known, the PHA will need to examine its existing inventory unit size to determine if the creation of a UFAS unit will be a:
  - i. One for one replacement.**
    - The size of the existing unit will accommodate the increased space required for the kitchen and bathroom.
  - ii. One for one replacement with a reduction in bedroom count.**
    - The existing unit will lose one or more bedrooms to accommodate the increased space required for the kitchen and bathroom.
  - iii. Combination of two or more units thereby reducing the amount of units.**
    - The size of the existing unit is not large enough to create the number of bedrooms needed and to accommodate the increased space required for the kitchen and bathrooms.
    - For an example, see attachments 1 and 2.
- b. Building Types:**
  - i. Ground floors with no step entries or ramps.**
  - ii. Duplex with elevator**

- iii. High rise with elevator
- c. Location: The UFAS units must be distributed throughout the inventory (they may not be concentrated in only a few developments). In order for the unit to be UFAS compliant, it must be on an accessible route to the manager's office, the community center, a playground, the laundry room, the parking lot and other common areas.
- d. Common area work
- e. Certifying Architect
- f. Relocation Issues: If the potential UFAS unit is occupied you will need:
  - i. An inventory of vacant units.
  - ii. A relocation plan including relocation issues.

**F. MTW Flexibility:**

1. Funding sources (Bond Funds, Housing Assistance Payment (HAP) Funds, Capital Fund Program (CFP) Funds, etc.)
  - a. As an MTW Agency, HABC's MTW Agreement allows for the flexibility to consolidate a number of funding sources into a Block Grant.
  - b. These funding sources include Operating, Housing Choice Voucher and Capital Funds, which includes Replacement Housing Factor Funds. HABC has elected to implement this fungibility process and has consolidated these funding sources into a MTW Block Grant.
  - c. Consolidating these funds has allowed HABC to pay for:
    - i. Making units UFAS compliant, rehabbing vacant units and performing modernization improvements that will improve physical conditions to ensure long term viability of existing inventory.
    - ii. These actions have ultimately resulted in increased housing choices and opportunities for persons of low income.
2. Long Term Affordable Units.

- a. MTW has allowed HABC to create public housing like units using voucher subsidy and to occupy these units from HABC's public housing waitlist.

**G. Creating additional UFAS Units – New Construction**

**1. Challenges**

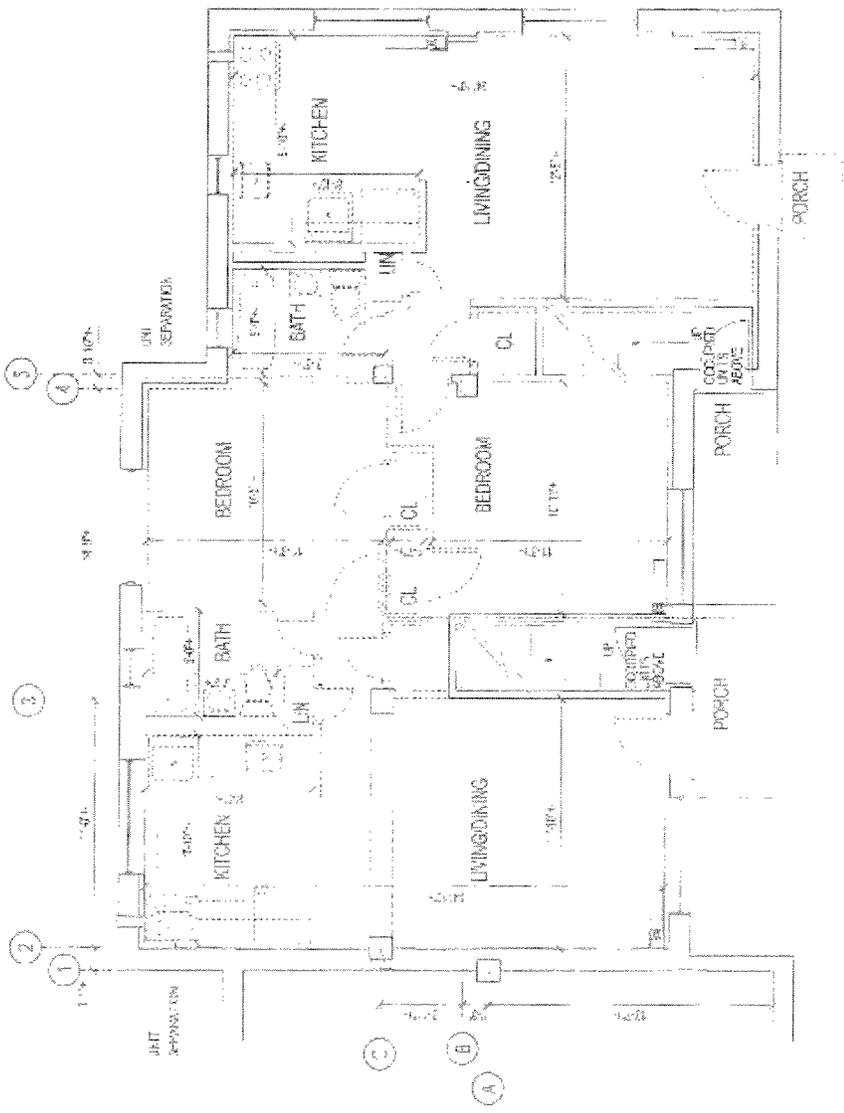
Creating units as part of a private development project is challenging because:

- a. HABC needs 2, 3 and 4 bedroom UFAS units and many developers of rental housing are creating 1 and 2 bedroom units.
- b. Developers do not want to make the units long term affordable because they want to use their own screening criteria, are concerned about their ability to evict households who are not meeting the lease requirements, etc.
- c. Developers are concerned about HABC's ability to fill the units with households who need the features of the units.
- d. Developers are generally resistant to creating more than the minimum required number of UFAS compliant units.

**2. Possible Solutions**

HABC is exploring the following means of creating the remaining UFAS units:

- a. Retrofitting more units in its existing inventory.
- b. Hiring a contractor to build UFAS units on City-owned and HABC owned lots.
- c. Hiring a contractor of modular units to be assembled on City owned and HABC owned lots.



1 TYPE A2 UNIT: 1ST FL. (2) - 1 BR UNITS



Developing Effective Employment and Self Sufficiency Incentives with and without work requirements and time limits:  
**HACSB's Pilot Local FSS Program**

Housing Authority of the County of San Bernardino  
Maria Razo, Marcia Waggoner

MTW Conference 2010 June 2, 2010

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Agenda

- ▶ HACSB Background
- ▶ Current Approved Activities
- ▶ FY 2011 Proposed Activities
- ▶ Pilot Local FSS Program
- ▶ Questions

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HACSB Background

- ▶ Largest Geographical County in Continental US
- ▶ 7,748 MTW Vouchers
  - ▶ 270 Non-MTW
- ▶ 1,661 Public Housing Units
- ▶ 1,497 Non-HUD Affordable Housing Units
- ▶ Approximately 140 staff
  - ▶ 3 HCV Offices
  - ▶ 6 Public Housing Offices (7 AMPS)
- ▶ Became MTW under CY 2008 Appropriations Act
  - ▶ Executed MTW Agreement March 2008
  - ▶ Submitted FY 2009 Annual Plan under new Attachment B

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### Pilot Local FSS Program

- ▶ Description-
  - ▶ This program will replace the traditional escrow account with a savings account where withdrawals for self sufficiency activities during the FSS contract term will be allowed.
  - ▶ Also considering allowing FSS graduates to retain savings account balance after contract term completion and upon graduation from HCV program (voucher term).
- ▶ Objective- Self Sufficiency
- ▶ Expected Outcomes-
  - ▶ Increased participation in FSS program
  - ▶ Increases to income
  - ▶ Increased completion of contract goals
  - ▶ Increase in HCV program graduates (due to self sufficiency)

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### Questions?



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### Contact Information

- ▶ Maria Razo, Deputy Executive Director,  
Office of Business Administration
  - ▶ (909) 890-0644, ext. 2217
  - ▶ mgrazo@hacsb.com
- ▶ Marcia Waggoner, Deputy Executive Director,  
Office of Housing Programs
  - ▶ (909) 890-0644, ext. 2380
  - ▶ mwaggoner@hacsb.com

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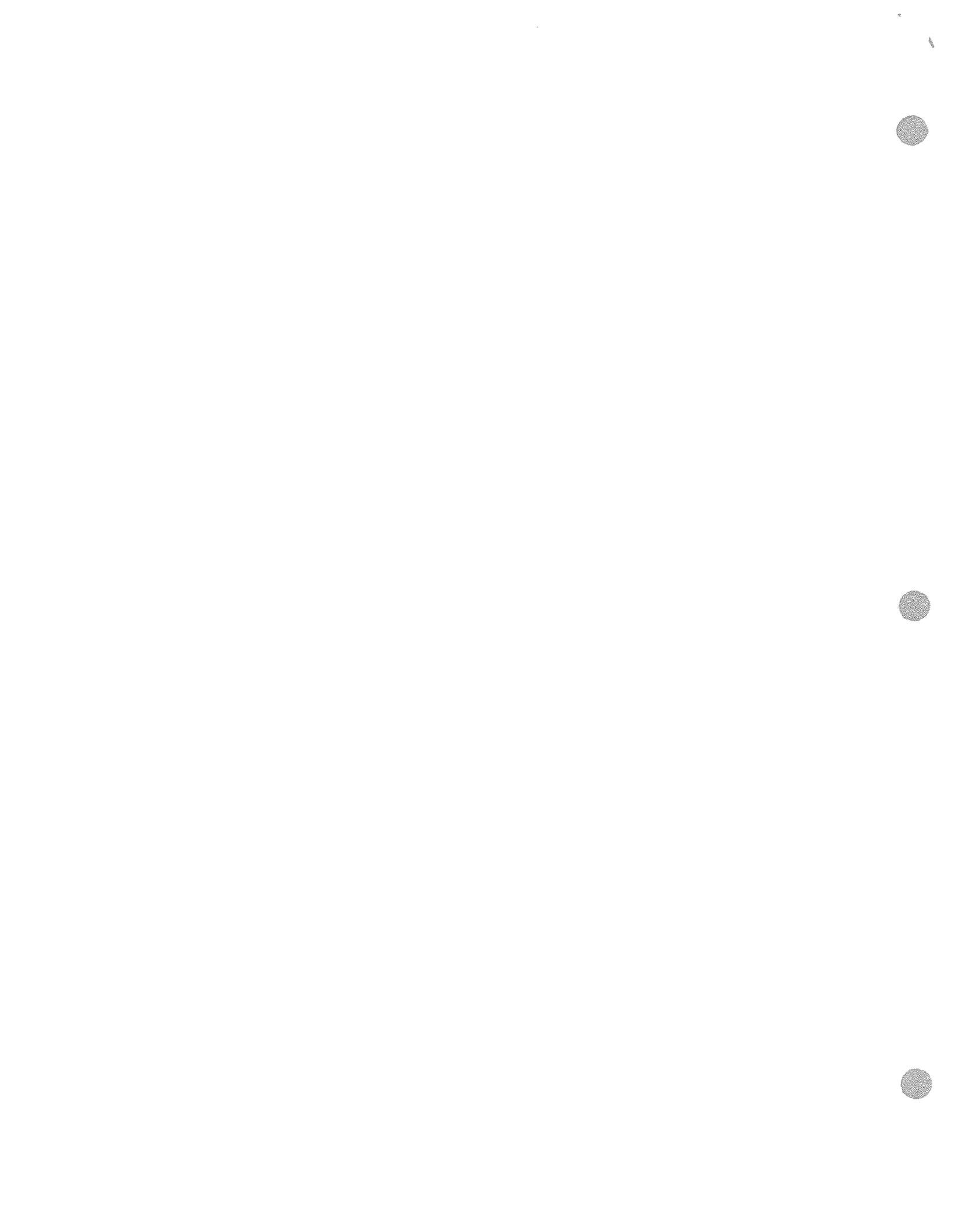
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# CAMBRIDGE HOUSING AUTHORITY

Moving To Work Conference  
Energy and Alternate Subsidy Calculations

Washington DC  
June 2, 2010




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### Consumption Summary

Where we are now -

2010 ACTUAL ENERGY CONSUMPTION AGAINST FROZEN BASE:

	Frozen Base 1999	2010 Actual Use	Usage Variance	Variance %	Cost Variance
Electricity - kWh	12,021,486	9,454,601	2,566,885	-21%	\$268,003
Gas - therms	1,099,557	1,356,166	(256,609)	+23%	(\$160,513)
Water - ccf	182,973	149,104	33,869	-19%	\$333,916
<b>Total Cost Savings:</b>					<b>\$500,402</b>

Where we are going -

2012 FORECASTED ENERGY CONSUMPTION AGAINST FROZEN BASE:

	Frozen Base 1999	2012 Forecasted Use	Usage Variance	Variance %	Cost Variance
Electricity - kWh	12,021,486	6,970,882	5,050,604	-42%	\$757,591
Gas - therms	1,099,557	1,445,145	(345,588)	+31%	(\$497,647)
Water - ccf	182,973	141,649	41,324	-23%	\$604,927
<b>Total Cost Savings:</b>					<b>\$664,923</b>




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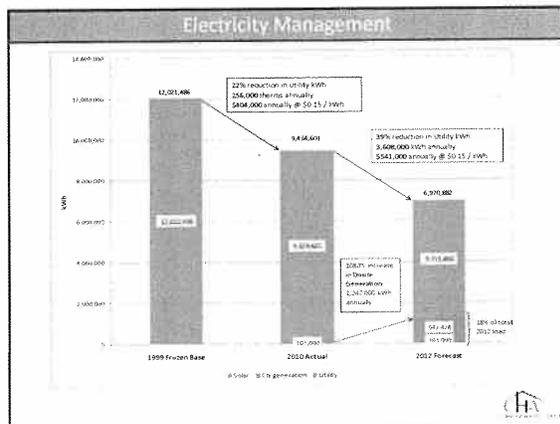
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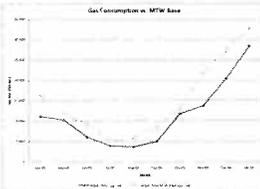
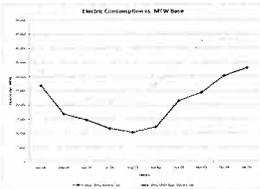
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### The Importance of Utility Reporting

- Effective management of frozen utility base requires constant vigilance (timely energy reporting)
- Energy reports are generated monthly and monitored both centrally and at sites.
- Progress of reduction against frozen base is tracked in aggregate and for each site.



FY 2010 reports for the Washington Elms Apartments



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### Consequence of Frozen Base

The Frozen Utility Base does not allow for energy complacency:

- ▶ The Energy Information Administration estimates that electric plug load increases by 1-2% annually, despite advances in energy efficiency technologies. Absent rigorous attention, this increased load can rapidly eclipse energy savings.
- ▶ Maintaining energy efficiency upgrades requires ongoing monitoring, preventive maintenance and repeated engagement. Aerators and CFLs can disappear, zone valves can be opened, pumps can fail, and equipment obsolesces.

The Frozen Base provides impetus to actively pursue efficiency upgrades and creative partnerships:

- ▶ Agencies may pursue private finance to leverage energy savings to fund capital improvements, and more efficiently engage in either third party or self directed Energy Performance Contracts.
- ▶ Funds are available as necessary to leverage private foundation or utility sponsored rebate programs.
- ▶ MTW authorities have the budget autonomy to direct energy related cost savings to best meet the overall needs of the Agency.



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**CHANGE.**  
CHICAGO HOUSING AUTHORITY

AMERESCO  SIEMENS

**Energy Performance Contract Project**  
Boiler Replacement Program

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**Public Housing & EPCs**

**What is an Energy Performance Contract (EPC)?**

- An agreement that provides for design, acquisition, installation, testing, operation, and - where appropriate - maintenance and repair of energy conservation measures in a building or a group of buildings.

**What motivates Public Housing Agencies (PHAs) to enter into EPCs?**

Make capital energy improvements while preserving limited budget dollars	Reduce repair and maintenance costs caused by outdated, aging, or obsolete equipment
Reduce their utility expenses	Modernize building operations
Provide technical and operations training for building operating personnel	Improve indoor air quality (IAQ)
Create incentives for ESCOs to develop highly efficient projects by linking their compensation to project savings	Conserve energy and water resources and improve the environment

**What is an Energy Services Company (ESCO)?**

- An engineering firm that develops, finances, and installs projects designed to improve energy efficiency and maintenance costs for facilities. Many states have enacted laws to govern EPC use, which may require the ESCO to provide a savings guarantee.

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**Project Summary**

- Vendors: Ameresco and Siemens
  - Boiler Replacement Project
  - Performed technical audits
    - 22 CHA properties
    - 4,811 units
- Purpose of the project
  - Replace aging equipment
  - Resident safety during cold Chicago winters
  - Increase efficiency, reduce gas consumption
  - Cost savings, reduce maintenance and repair
  - Cleaner environment, reduce CO2 emissions

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## PHA Financing Options

### Traditional Approach

- **Add-On Subsidy:** This additional subsidy would be applied to amortizing payments for a loan contracted to finance energy-conservation improvements with a repayment period not to exceed 12 years.
- **Frozen Rolling Base:** This incentive freezes the 3-year rolling base utility allowance at the level of consumption before installation of the energy improvements. This incentive applies when payments by the PHA to an ESCO or third party financier are dependent on the amount of energy cost savings realized.

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## Financing Plan

CHA chose a hybrid financing strategy:

- CHA Bond Issue – Build America Bonds (BAB's)
- ARRA Stimulus Competitive Grant

### ARRA Approach

**Build America Bonds** – Interest Subsidy Adjustment of 1.92%

Net yield of 3.76% & potential BAB's savings of more than \$2,000,000

CHA applied for 82 CFRC grants and won 61

(including 18 grant awards for Creation of Energy Efficient, Green Communities under CFRC (Category 4 Option 2) totaling approx. \$18,000,000)

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## Standard & Poor's Rating...

### CHA Issuer Rating

- Standard & Poor's (S&P) Ratings Services has assigned its 'AA-' issuer credit rating (ICR) to the Chicago Housing Authority (CHA).
- At the same time, S&P also assigned its "AA-" rating to CHA's \$25M Taxable revenue bonds series 2010 (Build America Bonds-direct)
  - Example: If the difference between "A" to "AA-" is approximately 65 basis points (approx. \$162k per year for 20 years or 3.3M if the rating remains constant.)

### Bond Yield Savings

BQ Tax Exempt All-in Yield	4.42%
Taxable All-in Yield	5.68
Interest Subsidy Adjustment	(1.92%)
Effective All-in Taxable Yield	3.76
Build America Yield Savings	0.66

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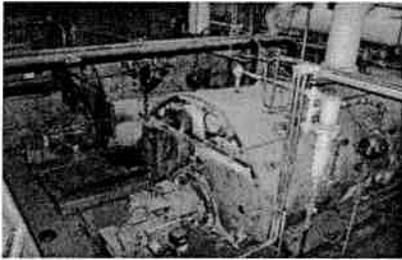
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Typical Boiler Plant

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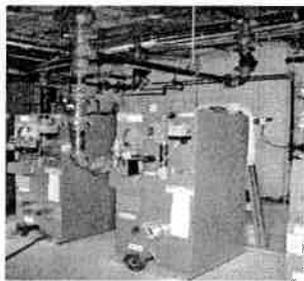
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New Boilers

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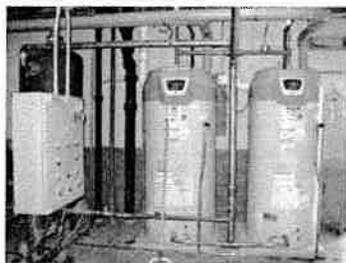
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New Hot Water Heaters

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## Win/Win

- Stimulate \$32M project & needed jobs
  - \$18M in ARRA CFRC grant award
  - 22 CHA Properties, 4,811 units impacted
  - 53 FTE's created since the 4<sup>th</sup> quarter 2009
- Improved quality of life
  - Replace aging equipment
  - Improve reliability and operating efficiency
  - Abatement of asbestos materials
  - Annual reduction of 5,835 metric tons of CO<sub>2</sub>, equal to removing 1,015 cars off the road
- Favorable financing strategy
  - \$2M in BAB's savings
  - \$3.3M projected S&P rating adjustment savings
- Guaranteed savings
  - Guaranteed 30% reduction in energy usage
  - \$1M in annual energy savings
  - \$9.2M in estimated project cost savings

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**HAPPY RESIDENTS!**

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**REDUCE**  
 SOYLENT GREEN IS PEOPLE!  
 CONSUMPTION  
 TODAY!

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Louisville Metro Housing Authority  
 How smart design can reduce  
 energy consumption

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**REDUCE**  
 It's the year 2022.... People are still the same.  
 And they do nothing to get what they need  
**CONSUMPTION**  
**TODAY!**

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**REDUCE**  
And they need SOYLENT GREEN  
**CONSUMPTION**  
**TODAY!**

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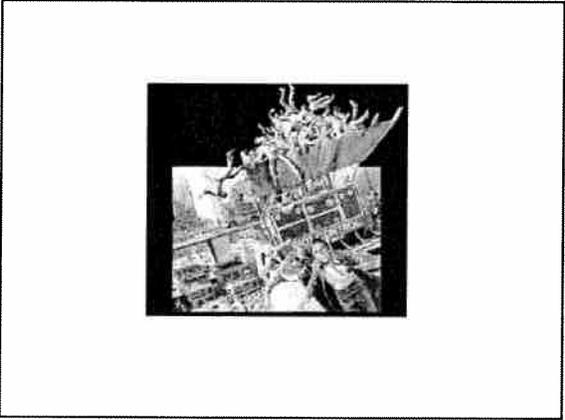
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“It is a question of building which is at the root of the social unrest of today: architecture or revolution.”

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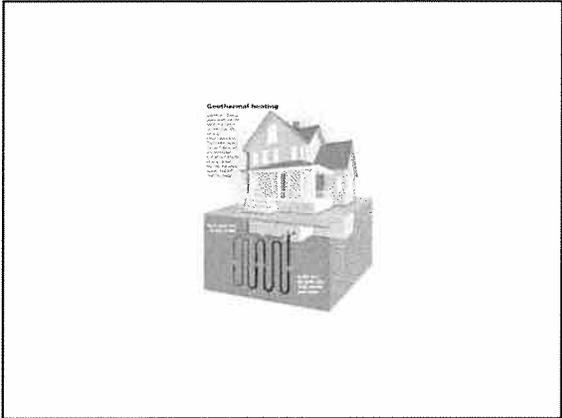
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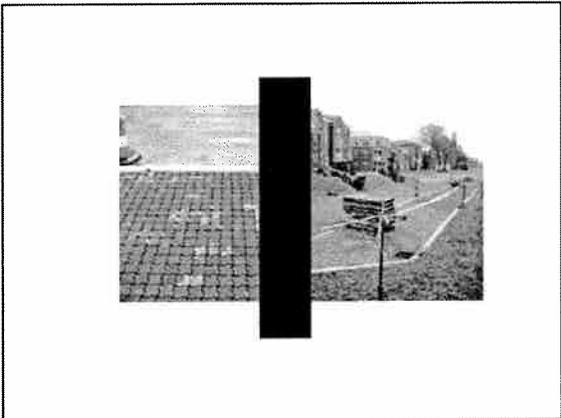
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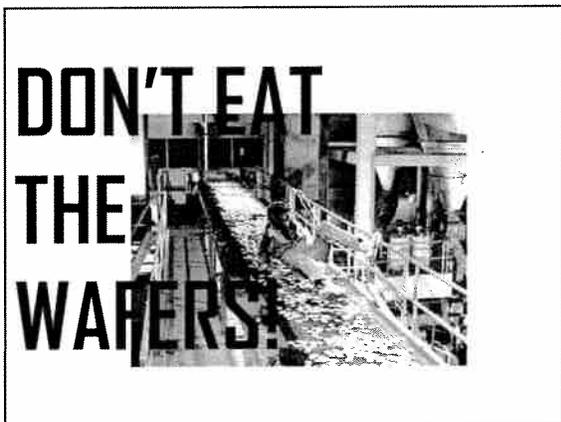
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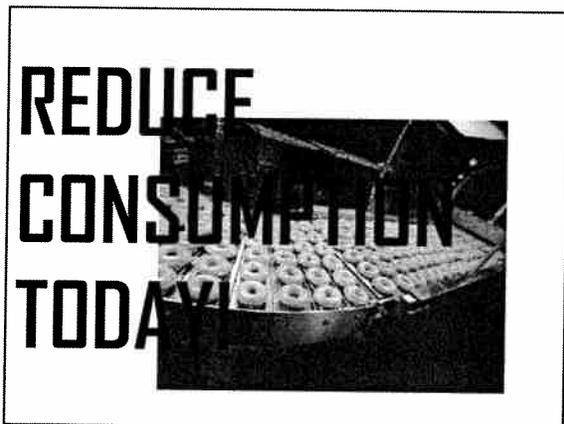
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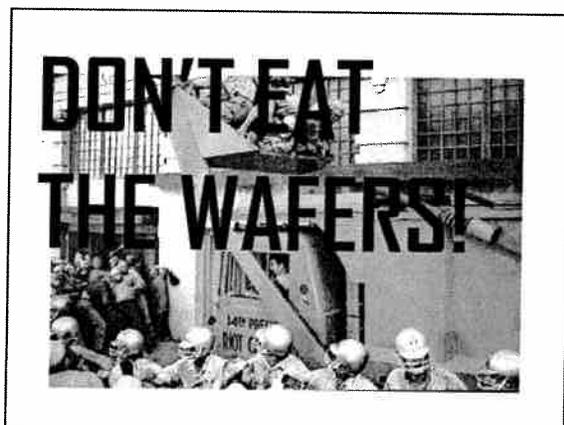
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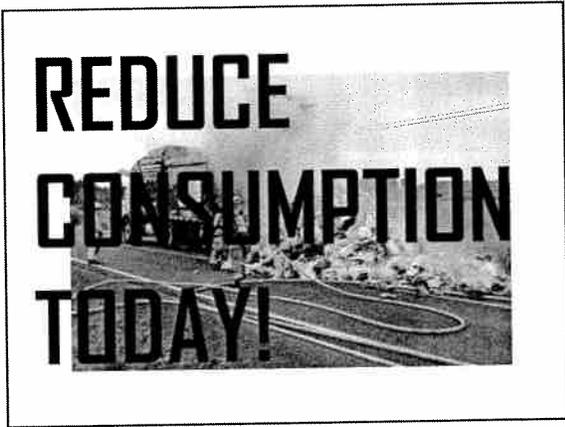
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**\$16,606**



-1,135,742	Total Energy Usage
-272,627	Electric Use
-2,091	Gas Use

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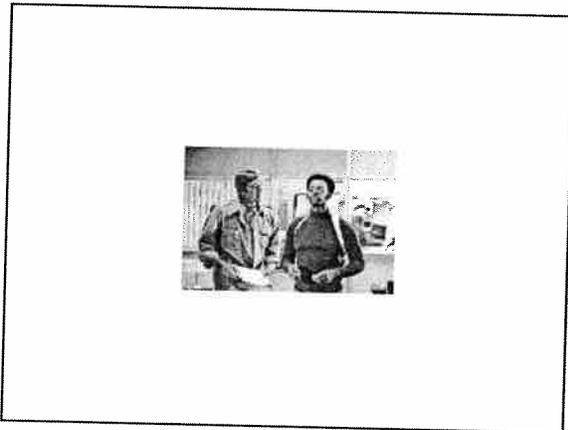
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Planning for the next 3 generations

- Compact traditional neighborhoods

"Modern life demands, and is waiting for, a new kind of plan, both for the house and the city."

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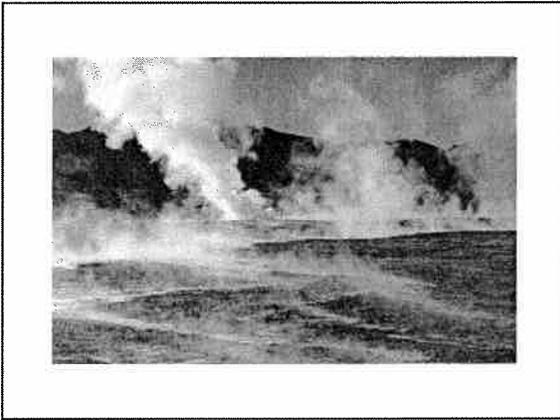
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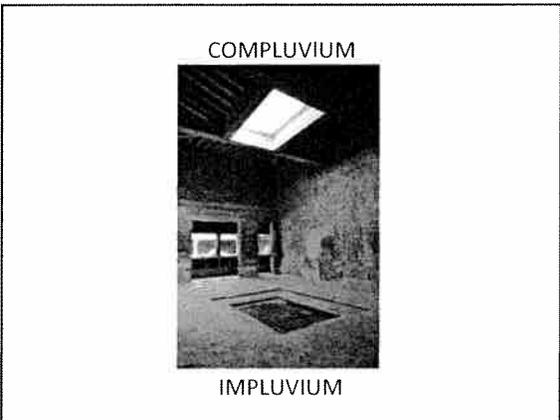
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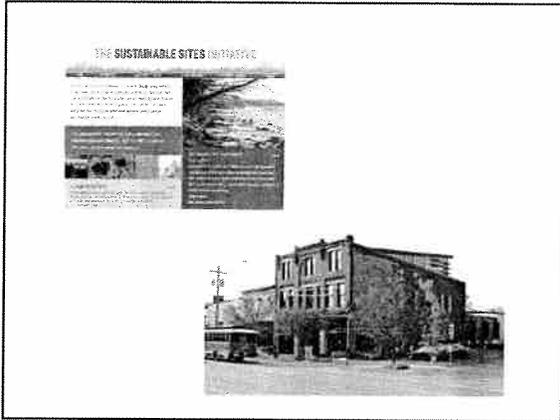
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Go Green today...

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Or we may be eating Soylent  
Green tomorrow!

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## VOUCHER MANAGEMENT SYSTEM

MOVING TO WORK CONFERENCE  
June 2010

### MTW CONFERENCE VMS INFORMATION

#### ◆ NOTICE PIH 2010-16\*

##### ◆ Four New Reporting Fields Added:

- 1) NRA updated through the last day of the month
  - 2) UNA as of the last day of the month
  - 3) Cash/Investments as of the last day of the month
  - 4) Number of vouchers issued but not under active HAP contract as of the last day of the month
- ▶ New fields became available for receipt of data in April 2010
  - ▶ Monthly data submissions required retroactively to January 2010

\*Not applicable to MTW programs at this time

MTW CONFERENCE  
VMS INFORMATION

◆ **APRIL 2010 Release Included:**

- ▶ All VMS reports and documents will be formatted in a printer-friendly Excel format
- ▶ Email Correspondence Enhancement
- ▶ The following HA information to be displayed in email correspondence to the PHAs:
  - ▶ PHA Number
  - ▶ PHA Name
  - ▶ Point of Contact Name
  - ▶ Submission Month and Year
- ▶ CC the official HA email address
- ▶ Data Collection report – all users should be able to view and generate the Data Collection Report
- ▶ Print Button – Provide a PRINT button on the main VMS page. This button will allow displayed form to be printed in Excel format.
- ▶ Hard Edit Codes for TP – codes were scrubbed to ensure accuracy of data being used. This should reduce the number of Hard Edits PHAs are receiving in error.

MTW CONFERENCE  
VMS INFORMATION

◆ **September 2010 Release - Expected Changes**

- ◆ Multiple tabs and screen layout – tabs will include:
  - ▶ Voucher UML and HAP information
    - ◆ the units leased and associated expenses will be lined up side by side, by category
  - ▶ Other Income and Expenses
  - ▶ Additional Expenses and Comments
  - ▶ Disaster UML and HAP
  - ▶ PHA contact information
    - ◆ will contain the same information that is currently at the top of the VMS submission page; the ED info will be prefilled; will also include FMC and FO contact information
  - ▶ Submission Tab
    - ◆ PHA can check on status of submission

MTW CONFERENCE  
VMS INFORMATION

◆ **April 2011 Release**

- ▶ Will contain Executive Summary Page that will allow User to monitor program utilization

MTW CONFERENCE  
VMS INFORMATION

◆ **REMINDER: VMS Reporting**

- ◇ Leasing and Expense information for Non-Voucher purposes
  - ▶ Enter in the Comments field the amount of funding that is being used for Non-Section 8 purposes. The amount of funding used, the number of families being served and the purpose should all be included.

MTW CONFERENCE  
VMS INFORMATION

**Questions???**



## VISION

The Housing Authority of the County of San Bernardino is committed to creating a world in which all people have a stable and enriched quality of life.

## CORE VALUES

Respect Safety Integrity Service

## GOAL VALUES

Communication Teamwork Innovation Client/Staff Development

## MISSION STATEMENT

The Housing Authority of the County of San Bernardino empowers all individuals and families in need to achieve an enriched quality of life by providing housing opportunities and resources throughout San Bernardino County.

## STRATEGIC GOALS (30 YEARS BY DECEMBER 31, 2037)

- Strategic Goal 1: No eligible family waits longer than 10 days for housing
- Strategic Goal 2: Clients have achieved their own personal level of stability and economic independence
- Strategic Goal 3: For those whom a transition is appropriate, the maximum stay in assisted living is 5 years
- Strategic Goal 4: HACSB leaders and supporters are innovative policy makers and influencers of legislation
- Strategic Goal 5: HACSB has secured the resources needed for accomplishing its Mission
- Strategic Goal 6: HACSB is a leading developer and provider of affordable housing in the County of San Bernardino
- Strategic Goal 7: HACSB is adequately staffed with well trained and fully developed employees
- Strategic Goal 8: HACSB communication is open, honest and consistent
- Strategic Goal 9: HACSB employees have a high level of morale
- Strategic Goal 10: HACSB clients, programs and properties are embraced by all communities
- Strategic Goal 11: HACSB clients live in safe and desirable homes and communities where they can develop and prosper



**Strategic Planning & MTW:**  
How HACSB integrated its MTW activities  
into its 30 Year Strategic Plan

Housing Authority of the County of San Bernardino  
Susan Benner, Maria Razo

MTW Conference 2010June 2, 2010

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Agenda

- ▶ HACSB Background
- ▶ HACSB Strategic Planning Process
- ▶ 30 Year Strategies
- ▶ Incorporating MTW Activities
- ▶ Annual Milestone Review
- ▶ Lessons Learned
- ▶ Questions

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HACSB Background

- ▶ Largest Geographical County in Continental US
- ▶ 7,748 MTW Vouchers
  - ▶ 270 Non-MTW
- ▶ 1,661 Public Housing Units
- ▶ 1,497 Non-HUD Affordable Housing Units
- ▶ Approximately 140 staff
  - ▶ 3 HCV Offices
  - ▶ 6 Public Housing Offices (7 AMPS)
- ▶ Became MTW under CY 2008 Appropriations Act
  - ▶ Executed MTW Agreement March 2008
  - ▶ Submitted FY 2009 Annual Plan under new Attachment B

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### Strategic Planning vs. Tactical Planning

- ▶ Strategic planning is the longest term planning that one does. It describes the broad commitments of the organization and the actions that will be taken to accomplish those commitments. Strategic planning does not take into account the availability or deployment of resources.
- ▶ Tactical planning is shorter term and has to do with how the organization is going to use specific resources to accomplish the near term milestones of the strategic plan.

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### HACSB Strategic Planning Process

- ▶ December 2007: Strategic Planning Workshop
  - ▶ 2 day process with staff (27) & board members (7)
  - ▶ Expected outcomes: The Strategic Planning Workshop was intended to result in the participants creating and agreeing on:
    - ▶ HACSB's Vision, Mission, and Values, and how the Values link to and support accomplishing the Vision and Mission.
    - ▶ A set of strategic goals that describes the accomplishment of the Vision and the Mission in measurable language.
    - ▶ Strategies for accomplishing the strategic goals that link the strategic goals back to the present, and include clearly articulated, tactical one-year goals (referred to as one year milestones).
    - ▶ A structure of support for the implementation of the plan, including establishing who will be accountable for the one-year goals that emerge from the planning process and what other structures are needed to ensure the plan is successfully implemented.
  - ▶ Designing the Future from the Future
    - ▶ Developed Strategies by Stakeholder Group (Community, Contributors, Clients, Employees) and created 30, 15, 7 & 1 Year Milestones

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### HACSB Strategic Planning Process

- ▶ January- February 2008:
  - ▶ Finalized Strategies, Substrategies, Milestones, Mission, Vision, Core Values, Goal Values
  - ▶ Established Strategy Coaches & Champions
  - ▶ Recruited staff for strategy teams
  - ▶ Branding Contest → Plan Forward
    - ▶ "Plan Forward" Kick Off
- ▶ March 2008: MTW designation received
- ▶ October 2008-March 2009: Quarterly measurement and reporting of Plan Forward milestone accomplishments
- ▶ April 2009: Incorporated MTW activities into Strategic Plan (as milestones)
- ▶ Summer 2009: Plan Forward Team Recruitment Fair (Year 2)




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Incorporating MTW activities into Strategic Plan

- ▶ Example #1
- ▶ Strategy I: Change client mindset from entitlement to empowerment
  - ▶ Substrategy I.A: Ensure that each client has, is committed to, and is implementing a feasible and inspiring (to them) plan for economic independence or life improvement.
    - ▶ Year 2 milestones:
      - A pilot work requirement program has been established and implemented at the Medical Center AMP. (Activity #15)
      - Local Policies for Portability have been established and implemented (Activity #8)
      - The Earned Income Disregard has been eliminated (Anticipate total phase out by 9/28/2011) (Activity #9)
      - The Minimum Rent has been increased from \$50 to \$125 (Activity #10)

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Incorporating MTW activities into Strategic Plan

- ▶ Example #2
- ▶ Strategy V: Ensure excellent/efficient stewardship of resources and programs.
  - ▶ Substrategy V.A: Strategically plan and manage Agency Performance and Operational Efficiency
    - ▶ Year 2 milestones:
      - Performance measures and tracking mechanisms for all MTW activities have been defined and implemented
  - ▶ Substrategy V.C: Create a Local Assessment System.
    - ▶ Year 2 milestones:
      - Collaboration with other MTW agencies to develop a uniform assessment system has taken place and been approved by HUD
      - A position to collaborate and implement (monitor, track, measure, and report) the approved local assessment system has been developed and filed
      - Automation for the local assessment system has been explored

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Outcomes

- ▶ Refer to handout

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### HACSB Strategy

- ▶ Measure milestones on a quarterly basis
  - ▶ Coaches report out on achievements on quarterly basis to Strategic Planning Team
- ▶ Staff Involvement
  - ▶ All agency staff were encouraged to participate as members of Strategy groups (strategy groups meet throughout the year)

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### Lessons Learned

- ▶ Integrate Moving to Work into Plan Forward strategy
- ▶ Align Strategic Plan with Fiscal Year
- ▶ Maintain employee ownership and buy-in
- ▶ Streamline annual planning process and leadership selection
- ▶ Align teams with their subject matter expertise
- ▶ Provide structure for developing department/individual performance goals and objectives that are aligned with Strategic Plan (and MTW activities)
- ▶ Revisit and refine milestones on annual basis
- ▶ Communication, communication, communication

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### Questions?

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## Data collection and Calculation Audit

### Solution:

- We added the ability to collect and store data on the MTW 50058 that is not uploaded to PIC but is stored whenever a 50058 calculation is performed.
- We are using the 50058 calculation to store data used to track progress even when no 50058 is sent to PIC.



June 2, 2010, Page 4

## Data collection and Calculation Audit

- By adding worksheets to the MTW 50058 we now have ability to put all statistical information in one location
- Auditors can look in one place when auditing file
- By storing all new data in our 50058 history files we can perform Data Mining at any time to get statistics for Management.



June 2, 2010, Page 10

Head of non-credit name	Serial Number	Invoice Number	Invoice Date
TRACKER NEW		5182360	6/01/10
<b>MTW Calculation Worksheet</b>			
<b>Calculation 3: Stepped Subsidy</b>			
300 Total # of Examinations on Corrected Examinations (Min 200)			6,000
305 Total # of Examinations on Corrected Examinations (Max 200)			1,270,000
310 Subsidy Step			2,500
300 Stepped Subsidy	HQSp = 1 Day 7 P.S. - 10 P.L. 500 - 50 from above		300,000
305 How to Correct Late Fee	HQSp = 1 Day 7 P.S. - 10 P.L. 500 - 50 from above		1,100,000
307 Total Exam to Correct (300 - 500)			100,000



June 2, 2010, Page 11

## Data collection and Calculation Audit

### Now you can track:

- How many Annual Re-examinations were not performed under the Biennial program
- How many Annual HQS Inspections were not performed under the Biennial program
- List of Tenants that Income went up or down over time
- Etc.



June 2, 2010, Page 12

## Goal Tracking

- One of the MAJOR feats of MTW is tracking the successes of Tenants as they go through the program
- If you don't set and track goals you will never be able to tell if your programs are succeeding

## Goal Tracking

FORMULA	CATEGORY	MINIMUM POINTS	POSSIBLE POINTS	PERCENT
1		0	0	
2		0	0	
3		0	0	
4		0	0	
5		0	0	
6		0	0	

Goal Filter	Item	Total Points	Possible Points	Percent
<input checked="" type="checkbox"/>	Financial Health Class	0	0	
<input checked="" type="checkbox"/>	Credit Family Budget	0	0	
<input checked="" type="checkbox"/>	Apply for credit card	0	0	
<input checked="" type="checkbox"/>	Max Credit Card Monthly Pay Balance	0	0	
<input checked="" type="checkbox"/>	Debt Management Counseling	0	0	
<input checked="" type="checkbox"/>	Debt Consolidation	0	0	
<input checked="" type="checkbox"/>	Refinancing	0	0	

## Goal Tracking

- By tracking a tenant's progress via Goal Tracking you will be able to quantify how many tenants are succeeding in your programs.
- These bench marks are stored to provide the ability to report on this data for any time period.

## Conclusions

- Tracker Flexible Cycles and the MTW 50058 provide solutions for MTW program requirements such as:
  - Tracking Biennial Re-exams
  - Tracking Biennial HQS Inspections
  - Data Collection and Statistical Reporting
- Tracker Goal Setting provides solutions for MTW program requirements such as:
  - Defining and tracking tenant self-sufficiency goals
  - Determining overall program success

**Baselines, Benchmarks, Metrics and Outcomes:**  
Using MTW Reporting Requirements to Effectively  
Measure On-going Implementation of MTW  
Activities Throughout the Year

Housing Authority of the County of San Bernardino  
MTW Conference 2010

June 2, 2010

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Agenda

- ▶ HACSB Background
- ▶ Current MTW Activities
- ▶ Measurement Strategy
- ▶ Quarterly Report
- ▶ Time Study
- ▶ Lessons Learned
- ▶ Questions



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HACSB Background

- ▶ Largest Geographical County in Continental US
- ▶ 7,748 MTW Vouchers
  - ▶ 270 Non-MTW
- ▶ 1,661 Public Housing Units
- ▶ 1,497 Non-HUD Affordable Housing Units
- ▶ Approximately 140 staff
  - ▶ 3 HCV Offices
  - ▶ 6 Public Housing Offices (7 AMPS)
- ▶ Became MTW under CY 2008 Appropriations Act
  - ▶ Executed MTW Agreement March 2008
  - ▶ Submitted FY 2009 Annual Plan under new Attachment B



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HACSB MTW Activities

- ▶ Single Fund Budget with Full Flexibility
- ▶ Strategic Investment Policies
- ▶ Alternate Assessment Programs
- ▶ Biennial Recertifications (Elderly/Disabled with no other adult members, no earned income)
- ▶ Local Verification Policies
- ▶ Elimination of Assets
- ▶ Controlled Program Moves (HCV Only)
- ▶ Local Policies for Portability
- ▶ Elimination of Earned Income Disallowance
- ▶ Minimum Rent (\$125)

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HACSB MTW Activities

- ▶ Local Project-Based Voucher Program
- ▶ Local Payment Standards
- ▶ Local Inspection Standards
- ▶ Local Asset Management Program
- ▶ Pilot Work Requirement
- ▶ Use of Funds – Vista del Sol Operating Subsidy

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HACSB Strategy

- ▶ Collaboratively work with staff to develop MTW Activities
  - ▶ Brainstorming Sessions with all staff and affected staff
- ▶ Conduct Impact Analysis; Finalize Activity
- ▶ Review best measurements for Activity
- ▶ Develop Baselines, Benchmarks, Metrics and Outcomes
- ▶ Determine tracking method
  - ▶ Time Study
  - ▶ VisualHOMES reports/queries
  - ▶ Financial Reports from Dynamics Great Plains (GP)
  - ▶ Off-line tracking systems

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### HACSB Strategy

- ▶ Measure activities on a quarterly basis
  - ▶ Time study conducted twice per year
- ▶ Developed measurements that are useful for day-to-day operations
  - ▶ Wanted to develop meaningful measurements that were tracked on-going
  - ▶ Continual measurement allows identification of implementation challenges and opportunities for ongoing training
    - ▶ For example, discovered that some front-line staff were still verifying large assets if self-reported by family
    - ▶ Training materials can be updated quickly to clarify any items of confusion

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### Example of Quarterly Report

- ▶ Handout of First Quarterly Report provided

Morning in Work Community Activity Report										
1. Morning in Work										
Location/Department	Employee Name	Time	Activity	Comments	Officer/Supervisor	Officer/Supervisor	Officer/Supervisor	Officer/Supervisor	Officer/Supervisor	Officer/Supervisor
1	John Doe	07:00-08:00	Check in							
2	Jane Smith	08:00-09:00	Check in							
3	Mike Johnson	09:00-10:00	Check in							
4	Sarah Lee	10:00-11:00	Check in							
5	David Kim	11:00-12:00	Check in							
6	Emily White	12:00-13:00	Check in							
7	Chris Brown	13:00-14:00	Check in							
8	Alex Green	14:00-15:00	Check in							
9	Mia Black	15:00-16:00	Check in							
10	Noah Gray	16:00-17:00	Check in							
11	Olivia Blue	17:00-18:00	Check in							
12	Liam Purple	18:00-19:00	Check in							

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### Time Study

- ▶ As part of MTW Measurements required to show time savings
  - ▶ Biennial recertifications
  - ▶ Elimination of Assets
  - ▶ Elimination of EID
  - ▶ Controlled Program Moves
- ▶ Initially attempted to have staff track their time for a two week period
  - ▶ Limited success with this approach
  - ▶ Created some level of confusion among staff about purpose
    - ▶ Some staff felt we were capturing time to evaluate performance and/or eliminate positions

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### Time Study

- ▶ Restructured Time Study for Oral Interviews
  - ▶ Identified key front-line staff deeply familiar with processes
    - ▶ Across all areas of HCV and PH and from all offices
  - ▶ Provided detail, in-person explanation of purpose of Time Study
  - ▶ Reviewed portion of MTW Plan where we outline baselines
  - ▶ Asked warm-up questions to get front-line staff comfortable with Interviewer

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### Time Study

- ▶ Asked for each interview:
  - ▶ What is the maximum, minimum and average amount of time it takes you to complete the process?
  - ▶ What impacts how long it takes to complete a process?
  - ▶ What part of the process takes the longest? The shortest?
  - ▶ During second Time Study: Have you noticed any time savings?
- ▶ Compiled data from each interview (total of 13)
  - ▶ Data was reviewed to determine level of accuracy, consistency, discover any possible outliers
  - ▶ Data was remarkably consistent...but not too consistent!
    - ▶ Provided a range of information we felt confident was accurate

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### Data from Other Systems

- ▶ Worked closely with all parts of the Agency to determine the best source for information
- ▶ Documented where the baseline data originated
- ▶ Gather on quarterly basis updated information
- ▶ Pulling queries from 50058 data and other data from VisualHOMES
- ▶ Pulling financial information from regular Board monthly reports
- ▶ Some data is being tracked "off-line" as there was no functionality in our line of business software to do so
  - ▶ Especially hardship requests

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Lessons Learned

- ▶ Make VERY good friends with IT database team!
- ▶ Include IT while developing baselines and benchmarks to ensure data is available, accurate and consistent
  - ▶ Having them understand the business processes helps them think through the best source of data for measurements
  - ▶ Also ensures correct fields are being pulled from the database
- ▶ Become very familiar with Rent Calculation!
  - ▶ Impact Analysis are required for any rent reform
  - ▶ HUD regulations on rent reform are quite detailed
  - ▶ Understanding PHA policy and practice are critical to conducting accurate rent impact analysis




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Lessons Learned

- ▶ Communicate, communicate, communicate with staff
  - ▶ MTW changes policies and procedures that have been in place for years
  - ▶ At first, MTW Activities can create additional work burden until new policies have been learned effectively
    - ▶ Important to have staff understand why policies were changed and when time savings should be achieved
  - ▶ HACSB developed "Fact Sheets" for all Activities that are helpful for participants, landlords, stakeholders and staff




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HACSB Fact Sheet Example

**HACSBFACTSHEET**  
**Moving to Work | OVERVIEW**  
**PUBLIC HOUSING RESIDENTS**

By May 2010, the Housing Assistance for the Elderly and Disabled (HAED) program will be fully operational. The program will provide rental assistance to eligible elderly and disabled public housing residents. The program will be managed by the Housing Assistance for the Elderly and Disabled (HAED) program. The program will provide rental assistance to eligible elderly and disabled public housing residents. The program will be managed by the Housing Assistance for the Elderly and Disabled (HAED) program.

**ELIMINATION OF MANDATORY EARNED INCOME DISALLOWANCE.**

The HUD regulations regarding the elimination of the mandatory earned income disallowance are effective as of 10/1/09. The program will provide rental assistance to eligible elderly and disabled public housing residents. The program will be managed by the Housing Assistance for the Elderly and Disabled (HAED) program.




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### Lessons Learned

- ▶ It is OK to refine baselines and benchmarks
  - ▶ After implementation we discovered a few measurements didn't fully reflect the activity
    - ▶ We modified our measurement in the Report with an explanation and will use our updates to manage day-to-day implementation
- ▶ It is OK to learn implementation isn't going exactly according to plan
  - ▶ MTW changes are wide ranging
    - ▶ Impact letters, forms, database, scheduling, briefings, etc
  - ▶ Measurements help us identify any missing points in implementation strategy
    - ▶ Encourage staff to speak up and respond quickly to feedback
  - ▶ Use measurements to confirm success/struggles with MTW Activity



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### Questions?



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