

HCV Best Practices: Leasing and Administrative Plans

HCV Best Practices Leasing and Administrative Plans

Good afternoon. I want to thank everyone for joining us today; I'm really excited about the information that will be shared. One of HUD's key goals for 2021 is assessing the utilization, administrative policies, and operational procedures of the HCV Program to identify leasing challenges. Today's panel of industry experts will share best practices, initiatives, and procedures to help agencies refresh their approach for effective and efficient leasing, retention, and increase property owner participation. This webinar is part of a three-part series on Housing Choice Voucher utilization; next week, the series continues with a discussion on strategies to maximize use of special purpose vouchers, and a final part will be on strategies to align voucher use with community needs. You can register for these sessions today on HUD Exchange if you have not already done so. Before we get started today, I would like to find out what you are looking to get from today's webinar. With that in mind, we're going to set up a poll, and we would like for you guys to answer the poll questions based on what you are looking to get out of today's session. If you're looking for the poll, you should be able to find it at the bottom right underneath the participant in the chat section. Right there, it will ask you, "What are you looking to get from today's webinar?" A review of the utilization of reports and trends, tips for establishing an effective leasing strategy, insight in revising and updating PHA policies and procedures, to learn PHA best practices for efficient tenant search, landlord engagement, and other leasing strategies. Feel free to pick more than one option.

Agenda

Today's webinar is broken into four major components. At the end of each section will be a discussion with panels related to the topic. Remember, if you have any questions related to specific section, go ahead and type that in the Q&A chat and we'll do our best to address it live. With that being said, I would like to start with introductions.

Webinar Facilitator – Candice Horton

So hello, everyone. I am the woman behind the slides. My name is Candice Horton, and I am a Vice President with CVR Associates, which is one of HUD's technical assistance providers, and I'll be facilitating today's section. I've been working in the public housing industry for more than 20 years, most of which has been in Housing Choice Voucher Program administration. I've worked with large MTW agencies as well as some small, unique housing authorities. In my time in the industry, I have learned that the only constant is change, whether it be sparked by sequestration or a global pandemic. As housing professionals, we must be able to pivot necessary changes to ensure that our



agencies are efficiently providing much needed affordable housing. In order for us to do that, we have to understand the goals and the purpose of the Housing Choice Voucher Program, the role of the housing authority, the needs of the people that we serve, as well as how to attract and retain community partners. With me today, I have five wonderfully talented HCV professionals who will be sharing their experience and their agency's strategies and best practices on leasing. At this time, I'm going to allow the other panelists to introduce themselves, starting with Corliss.

Webinar Panelist – Corliss Alston

So, good afternoon, everyone. My name is Corliss Alston, and I'm with the Housing Authority of Baltimore City. I'm the Senior Vice President. I've been with the agency for many years, and my expertise has always been with the Housing Choice Voucher Program. I've served in many different capacities: Associate Deputy Director, Managing Director, and Administrator for Special Programs. Our agency, the Housing Authority of Baltimore City, is a Moving to Work agency, so we've established many flexibilities with SEMAP, HUD regulations, and strategic planning.

Webinar Panelist – Courtney Cameron

Thank you, Corliss. Next, I would like Courtney to introduce himself.

Thank you, Candice, and greetings to my fellow panelists and our guests. My name is Courtney Cameron. I am the Deputy Director here in Westchester County, New York, where we manage a portfolio of 8,000 vouchers. I have the pleasure of being of service to the affordable housing industry and the families we serve for over 10 years. I am a process improvement efficiency agent. I love the integration of technology in the work that we do, and I love being a part of the integration process. That's why one of the benefits that I've brought to every agency that I've worked with. I look forward to the presentation and the discussion, and I'll pass it back to you, Candice.

Thank you, Courtney. All Panelists, when you're not speaking, please remember to mute your mic to cut down background noise.

Webinar Panelist – Ryan Creech

Next, I would like Ryan Creech to introduce himself. Hey, guys, I am Ryan Creech. I work for the Atlanta Housing Authority. I manage landlord services. So, of course, I've got 10 years' experience in the private market, and we did affordable housing plus market rents. Then, I came to Atlanta Housing to kind of bring those private market values into the public housing industry. I've been with Atlanta Housing for nine years. I'm really big in the IT role there. I'm the subject matter expert for our system with our portal, our Yardi Voyager system, plus with the program. So, I've worked very, very hard to try to bring all the aspects of actual property management and retaining landlords and tenants to the



HCV Program. I'm just glad to be here to show you guys some innovation that we've done, give you kind of "how we work" at Atlanta Housing. Thanks so much.

Webinar Panelist – Heather Gaines

Thank you, Ryan. Next, I would like Heather to introduce herself. Please make sure when you're not talking to your microphone is muted.

There we go. Good afternoon, everyone. My name is Heather Gaines. I am the Director of the Housing Choice Voucher Program for the Cuyahoga Metropolitan Housing Authority. I have roughly 15 years of experience. I did start my affordable housing journey with the Housing Authority of the City of Pittsburgh, which is where I actually cut my teeth concerning public housing in general. I was there up until about two years ago. HACP is an MTW agency, so I went from that to CMHA, which is a traditional housing authority. And, let me tell you, coming from MTW to a non-MTW agency really does test your mettle and really makes you appreciate the creativity and the knowledge that I found whenever I joined the CMHA family in figuring out how to do what it is that you do with a Housing Choice Voucher Program. CMHA has a portfolio in their Housing Choice Voucher Program of 15,500, and it is growing! So, I am looking forward to sharing our best practices with you and communicating with the group in general.

Thank you, Heather.

Absolutely.

Next is Shannon.

Webinar Panelist – Shannon Peterson

Good afternoon, everyone. My name is Shannon Peterson. I am the Vice President for the Housing Choice Voucher Program with the Housing Authority of Baltimore City. So, I'm also in Baltimore. I have over 10 years of experience with the Housing Choice Voucher Program. I have experience with leasing, inspections, we did a lot of work to upgrade technology over the years, and we're currently reassessing a lot of things to address the current environment that we're in. I also have experience with the waiting list, project-based programs, and mod-rehab programs. I'm excited to join the conversation and happy also to hear feedback from the other panelists. So, thank you.

HCV Program – Background and Key Concepts

Thank you, Shannon. As we get ready to start our discussion on the HCV Program, its background, and key concepts, as promised, I do have another poll for you. Let's get that put up on the screen. The poll question this time is going to be, "What do you feel is the greatest impact of the Housing Choice Voucher Program in your city?" So, your options will be it provides affordable housing, it minimizes homelessness, it fosters family self-sufficiency, it provides housing options to special needs populations, and it provides



families with access to diverse community and expanded opportunities. Again, the poll is located in the bottom right under the chat, and you can select more than one option. Okay, so I'm going to briefly discuss the purpose of the Housing Choice Voucher Program, its participants, and how the relationship is structured.

HCV Background

So, what exactly is the Housing Choice Voucher Program? It's a publicly funded program that provides rental assistance to eligible low-income families and other special needs groups to select housing within the private rental market. Congress created the HCV Program as part of the Housing and Community Development Act of 1974, and the U.S. Department of Housing and Urban Development funds the program and provides regulations and guidelines to public housing authorities for HCV administration. The program is intended to improve housing opportunities for families by providing subsidies that makes their rent affordable, and a family typically pays no more than 30 to 40% of their adjusted monthly income towards rent. This calculation also takes into account whatever utilities that they will be responsible for. Through partnerships with property owners, the HCV Program offers a variety of housing choices for voucher holders. This includes apartments, duplexes, single family homes, townhouses, and condominiums, creating opportunities for our families.

HUD Responsibilities

So, some of the responsibilities for HUD, and to make sure of the success of the HCV Program, is dependent upon these relationships with four key players. And those four key players can be seen here in this diagram as far as the housing authority; HUD, which we already know is going to be above providing the funding to the housing authority; the owner; and the participant.

So, what HUD's role is going to be is to provide those funds, develop regulations and policies for program administration, issue notices that clarify how to implement the procedures, offer educational materials that explain housing legislation, provide technical assistance and training to agencies on these regulations and policies, and allocate the funds to agencies providing tools to ensure that the housing authority's data is collected and utilized for future funding, and to enter into contracts with the housing authorities that administer the HCV Program.

PHA Responsibilities

What the PHA is going to do is manage daily operations of the HCV Program in accordance with those federal rules and regulations; its performance is then monitored to ensure fiscal integrity and effective voucher utilization; it's going to determine program eligibility for applicants, participants, and owners; and conduct reexaminations for continued eligibility; ensure program obligations are met by participants and owners, ensuring safe, decent, and sanitary housing; and provide applicants, participants, and



property owners, as well as other community stakeholders, with timely and professional service.

Participant Responsibilities

Then, we have our participants. They're going to be responsible for adhering to all program obligations, providing the housing authority with all required documentation to determine initial and continued eligibility on the program. They're responsible for finding suitable housing, maintaining that unit in accordance with all the lease terms as well as the tenancy addendum, reporting all income and household composition changes timely so that subsidy can be calculated accordingly, and complying with all ongoing activities, such as recertification and HQS inspections.

Owner Responsibilities

The last player, and one of the critical players, are owners. And what they do is provide the PHA with all required documentation to determine if they're program eligible and if their units are program eligible. They are responsible for selecting and screening families for suitability and determining if they want to enter into a lease with that family. They have to comply with the terms of the Housing Assistance Payment Contract and the lease, as well as the tenancy addendum. They need to maintain the unit and, of course, to Housing Quality Standards. They're responsible for collecting rent and any lease enforcement actions that need to be taken.

HCV Process

So, this graphic shows how each of those players work together.

HUD and the PHA: So, their relationship is based on HUD writing those program rules and giving the money to local agencies to run the program. The PHA then uses those funds to do all administrative and operational features of the program, and to pay part of the family's rent to the property owners. HUD and the PHA enter into a contract for funding and for the administration of the program.

The participants and PHA have a relationship. The residents who qualify for the program receive a voucher from their local housing authority to help pay for their rental unit. The applicant signs a voucher containing all their family obligations, outlining what they need to do in order to participate on the program. And then the PHA works with them and gives them their voucher. They are then now a voucher holder or a participant.

The property owner and the PHA have another unique relationship. So, when a property owner wants to rent a unit to a voucher holder, and the PHA and the property owner agree, they'll enter into what's called a Housing Assistance Payment Contract, establishing a subsidy agreement that the PHA will pay on behalf of the participant.



Now, the property owner and the participant have their own relationship based on who is suitable based on the owner and the participant on identifying the unit that they select as they choose for their housing. Together, they sign a lease, which is also accompanied by the tenancy addendum that governs that relationship between the property owner.

Panelist Discussion

So, those are the goals and responsibilities of the HCV Program, and we're going to go ahead and start our panelist discussion where I will like Heather Gaines of Cuyahoga Metropolitan Housing Authority to start by discussing the impact that the Housing Choice Voucher Program has on her agency's jurisdiction.

Thank you so very much for that introduction. So, in looking at the overview that Candice had provided to us, whenever I was looking at that, one of the things that always stands out, as far as the impact that the Housing Choice Voucher has on Cuyahoga County or any Housing Choice Voucher Program has with any jurisdiction... Obviously, it is to provide people, very low, extremely low-income persons, the ability to find suitable and stable housing for their families and themselves. But that overview really did highlight for me one of the most important parts, which is the relationships that we have with the other parties involved, because, as all of us know, unless we have that relationship, the Program isn't going to work. The Program is not going to work if we don't have a solid relationship with our owners. It's also going to not work if we do not have a relationship, a good relationship, with our participants and applicants, and consequently, the relationship, all the parts, if the owners and the participants or voucher holders don't foster a good relationship as well. And therefore, whenever I was sort of whittling this down, I came back to the old reliable, which is communication is key, and the message must be consistent. And that is from the housing authority to owner, owner to voucher holder, voucher holder to agency, and agency to voucher holder as well. So, in looking at how good communication is facilitated and fostered, I thought about of the things that I have employed, or that we have employed here with relationship to this topic, is really identifying how this agency and the HCV Program itself communicates to our owners and to our clients and how they communicate to us to make sure that it is as streamlined and as useful as possible. CMHA, actually, whenever I'm thinking most recently, we actually employed an explainer video for our newly established Housing Choice Voucher waiting list. We opened our waiting list in 2020, late November of 2020, and it has remained open. So, we reached out to a fellow housing authority to find out how they communicated with their stakeholders, their applicants, how to advertise, how to market, and how to communicate effectively with the new applicants about their new waiting list, and I believe we reached out to Dallas, and they actually provided us with the information of a public relations firm we worked with to have this explainer video. That explainer video got fantastic feedback! And to this very moment, I always make sure to refer all of our applicants, as well as our stakeholders, back to that explainer video, because, as an explainer video, it explains the new waiting list process, it explains what happens after the applications are processed in the event that you are selected, and it does it in a very easily digestible way. We have typically, whenever I provide somebody with that information, as far as to go to that website to review the video... And if they have



any questions, they can reach back out to us. Very rarely do I actually get an applicant who has additional questions. So, that explainer video does it all. And it's so relevant, especially for right now, we are in a YouTube crazy sort of situation.

We have this situation where if you want to figure out how to do something, do YouTube, YouTube all of the time. So, we decided to employ that level of technology, and let it work for us. And it has worked very, very well. And most importantly, it's taking something that can be convoluted as far as trying to explain to somebody what it is and very dry, by the way, as well, and puts it in a very easily digestible form. So again, when talking about communication, for CMHA, it really is about making sure that we are successfully communicating and relaying ideas and concepts to the people that have the questions and making sure that we're speaking to them in terms that they understand and from their perspective. We try to limit the government terms as much as possible, have provided them with a clear and defined explanation or answered their questions, so that they can successfully get there.

Heather, thank you for sharing that information, and I did see a question in the chat regarding the creation or production of your explainer video. I would like to stick a pin in it for just a little while because we will get into discussing leasing effectiveness for participant search in a later section. But I think we will put a pin in that for now and move forward in the presentation, and we'll be happy to discuss that in further detail a little bit later in the presentation.

Reporting, Analysis, & Streamlined Processing

At this point, I want to move on to our next section, which is reporting analysis and streamlining processes. Again, I have another poll for you. And, this poll is going to ask, "What does your agency consider when developing its voucher utilization strategy?" Does it consider the use or the information identified in the HUD Two-Year Tool, in HUD's Voucher Management System (or VMS), use of agencies voucher leasing reports (these may be created out of your system of record), any agency voucher retention analysis that's done, rent market trends, or community needs. One or two of these are all above. Again, you can select multiple choices. We'll be sure in the FAQs to post all the results of each poll that is completed today so that you guys can get a glance if you missed it and have that information to refer back to at a later date and time. Thank you for your participation in the poll.

Performance Tracking Reporting

Now we're going to talk about performance tracking and reporting. All right, a critical aspect of evaluating your leasing strategy and determining if your administrative plan needs modification is an analysis of your agency's utilization and leasing performance. Performance tracking and reporting allows an agency to identify operational challenges, trends, rent market obstacles, as well as impediments rooted in administrative policies and procedures that may impact the family's ability to successfully find housing or discourage owners from participating in the Housing Choice Voucher Program. There are



three primary tools agencies should use to complete this analysis. The first one being the Voucher Management System, or VMS, which collects data from housing authorities that allow HUD to fund obligations, disburse and reconcile these funds based on actual PHA leasing reported to HUD. It is used for cash management, administrative fees, HAP budget, populating the Two-Year Tool, and other initiatives such as monitoring special purpose vouchers. There is an HCV financial management webinar series that's available on HUD exchange. They have a particular webinar that's on VMS and cash management that covers reporting requirements for VMS, how to use VMS, administrative fees, annual budget authorities, and the importance of proper and timely VMS reporting that I suggest people take a look at. It dives very deep into your VMS utilization, so I think that would be a benefit. Again, you can find it on HUD Exchange, and it's available on demand.

Next is HUD's Two-Year Tool, which is shown on the screen. And what HUD's Two-Year Tool does is pull various information from VMS and provides critical metrics for utilization assessment. So, VMS is going to look at total vouchers to be leased. These are vouchers that are out on the street searching, you'd have participants have their moving papers in hand and are looking for a unit. It also has your units month leased. These are going to be units that are currently in a Housing Assistance Payment Contract that the agency is paying for. That's going to also look at your HAP expenses and Restricted Net Position. The Two-Year Tool allows agencies to monitor leasing and estimate funding for the following year, as well as maximize leasing for the current year in order to prevent deficits or the PHA going into shortfall. And then the third component is going to be voucher retention trends. And this is going to be to identify trends that the housing authority is facing. And they will utilize either reports from their system of record rather using Yardi Voyager, Emphasys Elite, or some other software. These should be used in addition to HUD's tools. Using your system data to look at household demographics, like the number of families that may be hard to house, that are elderly or disabled, to look at data such as how long participants are taking to search for a unit, looking at your leasing success rate, what is the process duration when processing a request for tenancy approval, what are your termination rates, as well as Housing Quality Standard activity - so how many units are going into abatement? How many HAP Contracts are you having to terminate due to HQS non-compliance? This will allow agencies to determine what leasing strategies they need to implement.

Determining Leasing Effectiveness

Determining leasing effectiveness comes from utilizing reports that provide significant data for thought around what administrative policies and procedures are impacting your HCV operation. To determine this, the PHA must examine trends around if it needs to look at its current leasing objectives and strategies, and what is this success based on: the reporting numbers that are either in VMS, the Two-Year Tool, or on your reporting, as well as feedback from your program participants and community stakeholders. The PHA needs to take into account any portability considerations. Does this jurisdiction see a high rate of port-ins and port-outs and the factors that may be exacerbating that activity, such as the job market in your area, rental prices, or even something like fair housing practices.



You also need to monitor your waitlist. Not only how many people remain on your list, but ongoing maintenance: periodically reaching out families to verify continued interest, updating information needed when calling families from the waitlist, as this will reduce administrative burden at intake and increase the number of families issued vouchers at admission. A cleaner waitlist is also going to help the agency determine how often it will need to open its waitlist, or if it should perpetually keep it open if that's an option. Utilization of special purpose vouchers needs to be considered- RAD and PBV can also pose unique challenges for a PHA as they tend to need additional considerations to ensure successful leasing as well as program retention. So, monitoring both the data, as well as your program partnerships, for example, with agencies like the Department of Veteran Affairs for VASH vouchers, is critical. Analysis and consideration of these components will determine where you need to make tweaks in your administrative plan.

PBV Utilization & Benefits

I briefly mentioned how we need to look at these special purpose vouchers in PBV. So, I wanted to talk a little bit about PBV utilization and benefits as I know this is an area of interest with a lot of housing agencies nowadays. Project-based vouchers are a way agencies can increase leasing effectiveness while providing greater housing opportunities for its participants. Under the most recent guidance from HUD, a PHA may use up to 30% of its voucher allocation for project-based vouchers and an additional 10% if you're going to put some exception units in. Some of the major benefits of PBV is the consistent pool of units for your voucher holders. It also may attract some owners not having to enter into individual contracts for each unit leased, and funding is already included in your annual contribution contract, so no additional work is required by the PHA. There's also a potential for increased diversity in housing. The low-income neighborhoods can become a little bit more mixed with mixed-income properties and add more opportunities.

Administrative Plan Evaluation – Payment Standards & Market Trends

Another administrative plan evaluation consideration is your payment standards. Payment standards hold one of the greatest opportunities to have impact on your agency's leasing. Consistently monitoring the market to make sure your payment standards parallel the market will provide families with greater opportunities in making their voucher comparable to non-HCV renters. You also have the ability to use Small Area FMRS or tiered payment standards based on areas of demographics within your agency's jurisdiction to provide for additional flexibility and encourage program participation in areas where rents may be higher.

Exhausting Regulatory Authority

You want to look at your payment standard flexibility. This should be regularly appraised and determine where adjustments can be tweaked. And some of the areas of



consideration for flexibility is if your agency chooses not to use Small Area FMRs, could you establish exception payment standards above allowable 110%? Different payment standards can be used based on location units as long as they are within the required range. If your success rate is under 75%, payment standards have been at 110% for at least six months, and search extensions were given, HUD may approve payment standards based on your 50th percentile of your FMRs or Fair Market Rents. Additionally, as a reasonable accommodation, you can implement higher payment standards up to 120%, and this can be approved without HUD approval. And if you have this written into your administrative plan and procedures up front, this could minimize that processing time and expedite your leasing. So, it's a consideration that when you look at all your flexibility that you have with your payments standards, making sure that it's understood and documented within your admin plan as well as your procedure manual and standard operating procedures, as this will expedite leasing for you. And then for Emergency Housing Vouchers, the payment standard can be set at 120% of the Fair Market Rent, and as we're saying, increasing those due to COVID, that is a strong consideration that agencies need to keep in mind.

Administrative Plan Evaluation

Implementing changes to your admin plan should include a three-tiered process, and that process starting with identifying where you need to make these changes and updating them in your administrative plan; updating your agency's procedure guides and standard operating procedures based on those administrative plan modifications; and communicating and educating all stakeholders, applicants, participants, property owners, to program partners and advocacy within the community regarding these changes. And then once you make these admin plan changes, you're going to want to start implementing them, along with streamlining, looking at your processes streamlining.

Process Streamlining – Forms & Customer Service

Some of the easiest places to make these changes are with your forms. And you can start by taking a look at all the forms that you have; with government, we tend to have a lot of redundancy in our forms. We make unnecessary or duplicative forms. You're going to want to look at the design of your forms and make sure that they are easy for the participant, applicant, or owner to complete or understand how to complete and fill out the form. Then, you're going to want to consider online documents, and we'll talk about this a bit later in another section. But just from a high level, you want to make sure that these documents can be submitted online. It's one thing to have a form, fill it out, or have to print it out, fill it out by hand, and take that form to your agency and have it submitted. Another consideration is the utilization of electronic signatures. You also want to think about electronic content management for electronic files and screening tracking. So, maintaining electronic files gives staff immediate access to reference tenant and owner files, which reduces the need to consistently ask for documents over and over again that may have been previously verified. Maintain a record of the results of any verification such a criminal background, any unit eligibility, any owner verifications, or screening criteria you have for your owners, make sure that it's documented somewhere to



minimize consistently vetting the same information over and over again. And then lastly, to streamline processes is having an effective customer service or call center that can provide clients with information in real time, or be able to answer, in general, program questions; provide a status on activities; explain how to initiate transactions; and provide information on upcoming events, workshops, webinars, anything that your agency has going on. And then also, of course, we want to make sure that has information regarding interpreter services, reasonable accommodations, and making sure that we know that any of our clients that need 504 have the ability to access that.

Panelist Discussion

At this time, I'm going to start the panelists discussion, and I'm going to turn the mic over to the Corliss Alston to discuss how her agency develops their leasing strategies and determines necessary administrative plan changes.

So, good afternoon again, this is Corliss Alston from the Housing Authority of Baltimore City. The first thing that we actually do is, annually and quarterly, we look at our ACC, and we determine how we can maximize our budget authority and also looking at what our agency's needs are. So, our agency's needs at the time may be developing strategies for applying for additional grants if they're available. One of the things that Candice talked about was the Two-Year Tool; once you understand what your ACC is, and what your agency's needs are, then you would complete that Two-Year Tool along with constant monitoring of the VMS and determining what your utilization is going to be, looking at your trends. I would say you want to monitor your utilization daily, your vouchers on the street, what your attrition looks like, your success rate, and understanding your baseline. The most critical thing I've found through my career is looking at vouchers leased versus your dollars, because your dollars may not necessarily support what you believe to be your vouchers leased. And that would come from monitoring your monthly check run, monitoring the VMS, looking at your portability considerations that Candice talked about. Daily, you want to look at those units that are being administered by other agencies. And, are they costing you? Because if they're costing you more than you want to, you want to consider, "Do I have enough finances to pay for that?" I would recommend that as you're looking at all of these, that someone has an eye on this daily, so that they can do monitoring and forecasting; forecasting is going to be the critical thing, monitoring your payments on hold, your abatements, your annual recertifications, your inspections, and looking at working with partners to ensure that you have, especially if you have project-based units under your program, you want to make sure that those units are occupied. And, if they're not, you want to have some conversations with those project-based contract sites to determine what the issues are. Determine why you have vacancies and how you're going to fulfill them. Monitoring your vouchers issued - have you issued enough vouchers from your waitlist? Do you need to stop? Do you need - what are your leasing schedules and your goals? Do you have enough applicants on your waitlist to carry you through that year? When should you open them? Monitoring your monthly HAP analysis of the UML: we meet monthly with our finance and accounting office who monitors the VMS with us just to make sure that we're on target. Are we meeting those goals, those projections that we had? I would say the utilization of the project based,



we've used project based, we have quite a few project-based units underneath our program. We did allow, allocate 30%, and you want to make sure that those commitments are intact. And when I say intact, are the units occupied? Are the units meeting the Housing Quality Standards? Are there any problems? Are they in areas not meeting the site and neighborhood standards for those particular areas? It's critical; you have a contract with the site, and there might be some management issues, so you would need to monitor them daily. The last piece then, and I'll open it up for Shannon Peterson, my colleague, if she wants to answer anything... Looking at administrative planning changes – so, we monitor and do administrative plan updates annually. And we keep a running to do lists of things that we need to change, or we want to consider changing and what those procedure changes would look like.

Communicating with our stakeholders, which could be our partnerships, to make sure that we're meeting their needs in terms of our landlords, our project-based sites, and what other things, community things, that we might do. We have a lot of set aside special vouchers, which would be RAD, project-based, family unification, and we've set aside some vouchers to meet the needs of the city in terms of homelessness, homeless vouchers for families, re-entry vouchers, vouchers we have set aside for families that have children with lead under the age of six. So, some of those are the needs of the city that we've taken into consideration, and the housing authority has allocated special vouchers for them. But, what I would say the most critical thing is to have a constant pulse on your HAP, your UML, monitoring that Two-Year HUD forecasting Tool, and, and your reserves, and your VMS. I'll turn it over to Shannon in case she has something that she would like to share.

Hi, again, I just wanted to touch a little bit on some of the reports that we use on a daily basis in addition to the Two-Year Tool and VMS. The most important reports for us are those that we've created through my software vendor, Emphasys Elite in Baltimore City, and looking at the leasing success rates has shown a lot of information, especially during this time in COVID, and the struggle to find decent units for our participants and our applicants. It's been a challenge, and looking at those reports has caused some changes to our policy, which I think we'll get to a little later. But, in addition, the voucher issuance success rate, because of the challenges with United States Post Office, we know that many of our applicants are not receiving their letters to come down for appointments. So, we've had to make changes to our administrative plan, so that those families who may have missed an appointment because they never received a letter, they still have an opportunity to receive a voucher at a later date. So, I believe we'll get into some of those things that we did. But the tracking of the report that we've created internally, through the data in Elite, which is our software vendor, has been very important to understanding the bigger picture. I see that we have a couple of questions here. Brett is asking, "Can you elaborate on how changes to policy would overcome some of the obstacles you discovered from VMS data?" So, I will pass that on to some of the other panelists, if you want to take a stab at Brett's question.

Okay, I will take a quick stab at it, Brett. So, in looking at your VMS and determining, "Are you utilizing your vouchers? Where is your HAP budget being utilized? Are you seeing where you don't have very many vouchers under lease?" This is going to kind of give you



a guide to where you need to dive deeper into looking into your system of record data (or if you're using any ancillary systems that track workflow processing). So, it is like your initiating starting point to see where your problem is, and then you use it to drill down further, you do additional reporting, and that's going to give you your guidance as to discover, okay, here's where my actual obstacles are. So, it's, kind of, I don't want to say a puzzle, but it's kind of a trail. You're going to find out, okay, here's where I am with identifying the impact to how many units I currently have leased versus how many I should have leased versus how many I have out on the streets. And then looking at the problem that my tenants aren't able to locate a unit because they're saying owners aren't accepting the voucher because it doesn't compare to the market. So, VMS data alone is not going to give you all the information that you need; you're going to need to compare it along with other reportings; like Shannon said, they've created reports in Baltimore utilizing Elite. There's a number of canned reports that can be utilized out of Yardi to identify where some of these obstacles are within the leasing process. And then you need to take that information and do an analysis on how those timeframes, those impediments that tenants are facing. Or, owners are saying, okay, the additional guidance, you may have added some additional rules around Housing Quality Standards or additional leasing initiatives based on concerns in your area around lead and things of those nature that you may need to say okay, well, I might need to partner with a city agency to deal with lead remediation. So, it's really taking the culmination of all your reporting, your HUD reports as well as your system reports, and then having the communication and dialogue around these impediments and obstacles to determine what you need to do specific to your policy to make those changes. Is there anyone else on the panel that wants to add on anything specific to their agency's reporting and streamlining strategies?

Hey Candice, I added mine in the chat to answer a couple of things. But, the biggest thing is when you're trying to utilize your vouchers, you got to think of ways to lease people up faster. You've got to think of ways to just grab on. I think Corliss said it best when she said it's not always about the people that you have. It's a lot of times about the dollars you spend. You've got to watch those dollars, and utilization is about utilizing your dollars, leasing up the people you need to lease up. At Atlanta, we had a tons of lease ups, we lease up a lot. But I think the biggest thing, you've got to watch is attrition, you've really got to watch your attrition. Because every time you lease these up and you think you're coming up on utilization, think about the things that happen when people come off the program, whether it be compliance issues, whether it be self-sufficiency, whether it be where they're opting out of the Program, maybe home ownership, where they're going into buying their own home. We've just seen that a lot where we had to start focusing on the dollars. It's helping a lot now that our Small Area FMRs are being used. We have higher payment standards than that, of course, of an MTW agency, but we're really focused on getting market rents to our landlords to retain them and be sure that these utilization dollars are all being utilized the correct way. So, that's my two cents, but I appreciate you letting me speak.

Thank you, Ryan.



Participant Housing Search

All right. Does anyone else have anything to add?

Preparing Families: Briefings

All right, well, we're going to talk about the participant housing search and preparing our families. And so a participant's successful housing search begins with the information that they received during the voucher issuance briefing. A session needs to comprehensively prepare the family for finding housing that's suitable to their specific needs. The briefing should not only explain how their voucher works but provide information on how to research best practices. So, there are a number of things that HUD states are required to be included in your briefing, such as a description of how the program works, how voucher size is determined, the terms of the voucher along with tolling, payment standards and utility allowances, affordability, the subsidy standard calculation overall, and of course, tenancy guidelines, as well as the family and owner's responsibilities as voucher holders and participants. And the families should be receiving a packet that details this information. Information on the PHA's jurisdictions, portability, and the advantages of deep concentration in areas of poverty, also to be included in your briefing. But there are some additional opportunities leasing success that could be shared during the briefing. And this information will prepare voucher holders for their inspection, so they know what to start looking for while they're searching for what may come up as a sale item so you can prepare them. I think a lot of times when we think about inspections, we prepare our owners first to come out, but I think the tenants need to be aware of what we will be looking for as well when we're going out to that unit to inspect. They need information on selecting a neighborhood that's based on the goals of the family. This is going to help with retention. So, they need to understand what the community offers the family: things such as public transportation; what schools are in the area; are there afterschool programs or childcare available; what kind of shopping is in the area; and things of that nature.

So during the briefing, the family should receive the following documents. And they need to be thoroughly explained; we need to not just hand them these pieces of paper and think that they understand how to either complete the RFTA, which is why we get them back half-completed or with missing information. So, we need to thoroughly explain what they're being provided with. We need a form that's used to request the PHA's approval for that unit. And it's helpful to have an instructions page as a guide for families and owners that will help reduce the number of corrections needed when processing the paperwork once it's submitted. The PHA's payments standards and utility allowance: the family needs to understand things such as gross rent and how their income plays into affordability and will this impact their rent determination? They need to advise the family on what information they would share with prospective owners during the housing search. Fair Housing and Equal Opportunity information based on federal, state, and local law should be included. Information on requesting reasonable accommodations for persons with disabilities; a list of known property owners willing to lease to HCV participants, this could also be directions to a website; this could be social serve or



affordablehousing.com code on section eight. And then materials on selecting a unit. Like I said, this is critical not only to initial reviews but to making sure that if a family moves--because a lot of times when families are first coming on, they're just so excited we're finally getting the subsidy--A lot of times they tend to just take whatever they can get so they can get leased up. So sometimes it's that second move for the family that's going to be the one that really keeps them in place. So, we need to make sure that they understand. Families moving is not only a burden on the agency, but it's a serious financial strain on the family as well. So, we need to make sure that we're preparing them in their unit selection.

Family Considerations

And some of these considerations that are going to retain the family that we need to educate them on (things to consider when searching for the unit that will help them better assess how their housing selection will create a better quality of life for them) are things like: is there enough space for the entire family in the unit; are the utilities included in the rent or not; and if the utilities aren't included in the rent, understanding how to get an estimate of what they will have to pay for those utilities; are there too many stairs to get to the unit, is it really accessible for the family; are the heating and cooling systems controlled by the tenant? If you're in a climate that's very cold in the winter, you know you're going to get a lot of complaints from your participants. And sometimes this is a reason why they move because they're cold in the winter; they prefer it to be 80 degrees in their unit but the owner says, "hey, 72 is enough." It's the little things that need to be considered. Is their access to public transportation or major access ways, freeways, and highways? Can they get where they need to go from the community in which they selected their unit? Is this a family with small children? Is there yard space or parks nearby that they can use? And are pets allowed? Someone may need a comfort animal or just wants to have the family dog. These are things that the family needs to understand. It's the makeup of their family that needs to be included in their considerations for locating a property.

Mobility Programs

One of the things that agencies are an option and an additional option agencies have in aiding program participants in a successful housing search is the implementation of a mobility program or some sort of similar search initiative. Mobility programs expand Housing Choice by looking outside of areas of concentration to provide the family with a greater selection in housing choice, or how can you choose from. And these opportunities may include access to better schools, community resources, like YMCA, the Boys and Girls Club, and community centers; closer proximity to grocery stores and shopping centers; exposure to new and diverse neighborhoods; higher quality or newer housing. And common benefits of this program are housing location services, security deposit assistance, a higher subsidy and inspection payments standards, areas as identified by the rental market and increasing housing opportunities. And then other services that some agencies may provide are neighborhood tools or a neighborhood that can provide transportation to clients to units. And then some also have loans and grants



for moving expenses or security deposit or utilities and things of that nature. And we'll talk about a little bit of this more in our panelist discussion, as I know one of our panelists has implemented a successful mobility program at their agency.

Online Briefings

Online briefings: as agencies look for leasing effectiveness, streamlining voucher issuing steps can minimize the time and money spent by the PHA. And offering online briefings minimizes administrative burdens, freeing up resources to focus on other functions within the agency. Additionally, having online briefings provides the family with more flexibility if families are working and may need to take the day off to come for our briefing. And having this information online or somewhere easily accessible, whether it be a website, a portal, or something of that nature, participants have access to revisit critical program information on demand while they're continuously assisted on the program. So not only does it free up time and administrative burden and minimize the foot traffic that you have in your office, it's a continuing education component for your agency as well.

Guidebooks & Newsletters

Program education is paramount to voucher retention and agencies should leverage these opportunities to keep families informed, and there's two ways this can be done. It's through the use of a program guidebook for participants as well as newsletters. So, a participant guidebook can serve as a companion to your briefing not only ensuring that HCV briefing compliance is provided, making sure that you have all your HUD required documents given to the participant at each briefing, but it provides the family with a manual of sorts, a reference throughout their participation in the program. And then the utilization of periodic newsletters can help inform families regarding new policies or changes to processes as well as available resources that may come up in between times of their briefing or when they're initial interacting with the program. So, this is going to help in their utilization of their vouchers as well because they're going to understand everything that is available to them. So at this time, I am going to turn it over to Courtney Cameron of New York state housing and community, really Westchester County Housing to discuss how their how they have implemented their participant leasing strategy. Courtney?

Panelist Discussion

Hi, thank you, Candice. As you alluded to in the beginning with debriefing process, debriefing is one of the most important components for families to understand the program requirements. And at our agency, we have developed a briefing presentation that allows the families to independently, interactively, and at their own pace, navigate the presentation as it walks them through all the requirements of the program. So as I indicated in my introduction, you know, I love integrating technology. So, what we have done is integrate audio into the presentation. So, the applicant is navigating the presentation, not just reading the presentation, but they're also listening to the

presentation as if they're in a room with a live person presenting it to them. So, once they complete all their presentation, you know, they will send all the paperwork back to our office. And, we will provide them with their vouchers and start the leasing process. So, this has worked pretty well for us during COVID. And, this is something that we definitely want to continue to use post COVID when our families start returning back to the office. It does help, and you know, I welcome all the other panelists to jump in at any point. And as Candice said, we did implement the mobility counseling program here in Westchester County. And, we have families moving out of concentrated areas into less concentrated exception areas, and they're provided with more assistance from their caseworkers, so the caseworker is helping them or guiding them and coaching them through the leasing process, helping them find units and helping them with the broker fees and down payment, like Candice stated earlier. So, this is helpful for families to move out of these concentrated areas and move into exception areas like Mount Kisco in the Westchester County areas. I'll open it up to the other panelists if they have any other...

Thank you, Courtney. Who wanted to go next? I'll go ladies first for sure, since Courtney and I are the only males, but who wanted to go before me?

No, go ahead, Ryan. It was Shannon. I'll go after.

Okay. So what, what we've done...I wanted to give you guys a little insight on how we do it in Atlanta when it comes to working with participants who are searching for housing and who are just maybe struggling without. We created an actual position for what we call a housing counselor. This housing counselor actually is the person who assists our participants. We have three of them in our in our agency. They actually assist the participant in finding housing. And they go out; they speak to landlords; they push out all the items that we have available. We use a report that shows what is coming available from our housing stock that a tenant may be moving out of. We use a report that shows, hey, what's coming up? So, you're searching right now as of, you know, August 31. We actually have this many coming out, and the housing counselors push those out to people with referrals. They actually speak to landlords. We've been able to use the housing counselors going out to these high-end communities that we've been able to meet rents in these areas of opportunity that Courtney was speaking of, which are amazing. Because in the past, we weren't really able to pull AMLI, Gables, all these things that all these different communities for multi-families that weren't really struggling. But now the pandemic's happening, and you've got people who are saying, "Hey, I don't know when my vacancies are gonna come up. There are moratoriums here. We've got some vacancies here. Can you meet our rents?" And with our enhanced payment standards that we've done or maximum rents, which houses are actually being updated again due to the ever changing and gentrifying markets in Atlanta. I don't know if anyone knows the housing stock in Atlanta for rentals, affordable rentals, are not very many. And, we're able to pull market rents on most of these and pull in plenty of these high-end units. But I think the big thing Candice said earlier was the tenants got to know what they're getting into. Is this an area where your doctors are there? Is this an area where you're close enough to family? Is this an area where your children would enjoy school? You know, where they get a good education. A lot of the schools in the city of Atlanta are rated very, very low, you know, twos. But in some of those high-end areas where we're



actually seeing what we call areas of opportunity, such as the Buckhead, the Midtown, the places where the rents are much higher, we're able to get people in into these high-end communities. And, it's a lot of... lot of times, it's the housing counselors that we have on staff going out and talking to those high-end communities and pulling them in. And then, myself and the director of Inspection Services will go and speak to the community, will do a full like Zoom call with all the higher-ups that actually sell our program, which has very, very, very, very many incentives for landlords. And not just to include market rents, we pay a leasing incentive fee, which is in lieu of a deposit. We pay you one month's rent, or for multi-family \$750, which is in lieu of the deposit for the things Candice was talking about earlier. Can you pay that deposit? We've got a, we got a high-end unit that's \$13- to \$1500 you want to move into, but can you afford \$1500 for the deposit? And that's the biggest thing is we just want to make sure we're giving every--every person that opportunity to lease up in the area that they want. As we know, it's called Housing Choice. It's a choice. We want you to actually have the choice of the place that you want. And in Atlanta, we've pushed very hard to use market rent ability to get the 1000 joys, and that's where those small area FMR is gonna come in for you guys who may not be in cities like us or housing authorities that are MTW agencies and can set their payment standards the way we do. So, thank you.

All right. Thank you, Ryan. Shannon, is there anything additional you want to add?

Well, I just wanted to address one of the questions in the chat around briefings and making sure that families show up. So, we also, in Baltimore, put together a briefing presentation. And, it's a voiceover. It's somewhat, but we still have an appointed time. So, we do still schedule time for the briefings to take place. And, we chose to do a Microsoft Teams call where we display it, and we have a staff person kind of guiding the presentation through. And at the end of the presentation, I believe certain steps or at certain points through the presentation and at the end of the presentation, there are certain documents that need to be signed. We do have electronic signature software. And then we have checkpoints throughout the presentation to give feedback, ask questions, and that kind of thing. So that helps to keep the listener engaged and also making sure that they stay throughout the entire presentation.

Alright, thank you for sharing that, Shannon. In addition, I can share some information I have in my experience working with other agencies. There are some who host these online briefings, and they may not have an accompanying staff member. What those agencies have done is built in what they call Knowledge Checks throughout the presentation where questions need to be answered. And you either have to answer the question correctly to proceed in the briefing, or there may be a Knowledge Check that you must score a certain percentage on in order to qualify for the voucher to be issued. So, there's a number of ways you can do it, depending on the amount of technology you have available at your agency or the number of resources that you have at your agency. But, there are a couple of options that are available. So when we answer this question on the FAQ, I'll make sure to list out several different options that are available of how you can ensure that your participants are actually paying attention to the briefing and not sitting there or not even sitting there but just playing on their phone before you issue



them a voucher. Alright. Does anyone else on the panel have anything to share before I head to our last and final section?

So, hi, this is Corliss again. I just wanted to mention that we saw that our voucher holders were having a hard time searching. So, we contracted with a vendor for voucher outreach and tenant placement, and it has yielded some success. So that might be something similar to the housing specialists that Ryan mentioned; it might be an opportunity; or if you find that your participants thought--your voucher holders are struggling with finding you.

Owner Participation

Alright, thank you, Corliss. Alright, well, I have one more poll, as we enter in our discussion about owner participation, education, and administrative processes and financial assistance. So I wanted to ask, what strategies does your agencies currently use to attract and retain owners? These would be things like outreach and education initiatives, streamlining processes to make it easy to work with the housing authority, providing online options to interact with the agency for various owner incentives that encourage property owners to participate with the program. Again, feel free to select multiple options; we have a few more seconds for the poll to be open. So, participation in the Housing Choice Voucher Program is critical to leasing success. And, there are three key elements involved in attracting owners to the program: education, streamlining administrative processes, and financial initiative. And, that's what we're going to discuss in this next section of the webinar. Alright, the poll is now closed and tallying our results. Alright, there we go. Thank you to everyone who participated in the poll.

Owner Briefings

Understanding the relationship between the housing authorities, voucher holders, and property owners, leasing effectiveness is also dependent upon how well participating owners work with the agency. Owner briefings give the PHA the opportunity to educate property owners and other interested parties in the benefits and the requirements of participating in the Housing Choice Voucher Program. So, having these owner briefings means you need to think about what should be covered and included in those sessions. So, you're going to want to make sure your agency is covering the HCV Program policies and procedures so they know what they need to do. You're going to want to cover Housing Quality Standards for inspections, and how to prepare the unit for it. How rents and subsidy is determined including how costs are used and how amenities and utilities are factored into a rent offer. The terms of the Housing Assistance Payment contract, including Part C, which is the tenancy addendum, and how it works in relation to the owner's lease. Lease and HAP responsibilities, unit marketing and tenant selection, highlighting fair housing laws, and then some basic property management tips. This also can be done in a separate workshop if you don't necessarily have enough time. The housing authority is not a property management company for the owner; however, we know they're going to call us with these. So, sometimes it's better to just be proactive,



and give them some tips for conflict resolution, how to make sure they're enforcing their leads, how to collect their rent, things of that nature.

Workshop & Guidebooks

So again, like I said, workshop and guidebooks can be tools to use with these. Open workshops specific to the needs of HCV owners increases engagement and knowledge, making it easier for owners to navigate the program and provide quality housing. And, it also helps to retain units on the program. Some of the common workshop topics focus on what tend to spark owners' concerns or cause increased interaction with the PHA. We know this is going to be, "How did you determine my rents? You are not paying me enough." Rent increases: "I've had the same rent for about for five years." HQS inspection: "Your inspectors are nitpicking, analyzing, finding and complaining about this little chip paint right here." Lead-based paint, fair housing--so these are just common topics. There may be things that are specific to your jurisdiction that you may want to highlight with your owners, and as you begin to interact with them, you'll find out what areas you may want to facilitate.

My suggestion would be some agencies like to take on these workshops and have one specific person that creates them; that can be a bit of a burden. So, you might want to partner with community agencies to have them come in, and you just host the workshops as opposed to creating all the materials yourself. Developing a property owner guidebook that can be shared with the owner at briefings or to just serve as a reference for processes and procedures will be helpful in cutting down the amount of questions and inquiries that the agency gets. Ensuring that this guidebook has a section on HQS will increase owner's understandings of those requirements and better prepare them for when we come out. And this will reduce the number of reinspection and potential unit abatements which will also hopefully mitigate some of the time that we're spending in the units or dealing with having to reschedule inspections and place an abatement just to have to list them or having to issue the tenants vouchers to search because the owner didn't understand how to prepare or be ready for their housing inspection. Additionally, you can do newsletters or email blasts if you don't want to do something as structured as a newsletter. Inform owners about resources available to them, new policies that will provide them insight on getting the most out of the program while creating more affordable housing opportunities for our families.

HCV Program Education

To ensure high levels of program knowledge and understanding among participants, participating HCV owners, potential owners, and other community stakeholders, PHA should provide ongoing education targeted specifically to these audiences. Educational programs to utilize partnerships as well as community events to provide the most up-to-date information on HCV Program benefits and procedures. And then the way in which an agency can create these educational opportunities with owners is to create a schedule of workshops and briefings and making sure that owners are aware when these occur. You can do them as one off; you can have a standing schedule; you can



have one that's in-person, an in-person briefing; you can have an online briefing. Come up with a strategy that's going to work best for you to be able to be inclusive of all your landlord population. We know that in HCV, you have these larger property management companies that you work with, as well as your smaller mom and pops. You want to be able to reach out to each of those demographics to make sure that you're providing as much opportunity for education and training to your landlord population. You may also want to consider participating in community events, meetings with city representatives, the police department, public safety meetings, and other HCV Program-designed events as requested to engage in diverse populations, and inform community members of HCV Program processes, enhancements, applicable city partnerships to expand the program awareness to the community as a whole, as well as promote a positive energy--a positive image--of the Housing Choice Voucher Program, dispelling some of the myths that come along with our participants and what it's like to work with our housing authorities.

Outreach & Marketing – Primary Audiences

When creating marketing and outreach strategies, PHAs should direct their efforts to some of the following groups. These should be your primary audiences that you're looking to work with. So, you're going to want to make sure that your current owners--these are owners that have units leased and receive current housing assistance or active Housing Assistance Payments-- perspective owners--these are going to be individuals or organizations that own rental properties within the PHA's jurisdiction and could lease to the HCV participants in the future. You want to plan strategies to speak with investors, people that are looking to invest in your community or purchase rental properties that could potentially be leased onto the HCV Program. And then, you always want to consider the public. The agency and its decisions have a significant impact on the community and the affordable housing landscape as a whole. Therefore, you should have an approach for addressing all the members of the community.

Opportunities

As we know, affordable housing is a great need all over our cities and all over the nation, and its availability is low. With that being said, agencies should also consider opportunities to reach prospective owners and educate them on the benefits of the program. In order to connect with these potential HCV Program owners, the PHA should consider participating in local real estate and investor meetings, seminars, conventions to identify and schedule opportunities of engagement. You want to make sure that real estate professionals understand that it's not that difficult to work with a housing authority. There is a lot of myths out here where people don't see the benefits of investing, because they think the amount of time it's going to take to work with the agency isn't worth the yield or return on providing that affordable housing. You want to make sure that it's clear to them on how they can see a return on their investment. I know agencies that have created investor one-pagers that show how leasing to HCV participants can benefit them with consistent Housing Assistance Payments and COVID. This became a big thing where we know a lot of people were not able to pay rent, and there was the eviction moratorium. So, owners were being faced with having people in units where



they weren't receiving money and the HCV Program became a little bit more attractive to these owners during COVID. So, I think it's beneficial during this time to kind of leverage the landscape that we're currently in due to COVID to appeal to real estate investors and potential property owners to make sure that they understand the programs, the benefits, and eventually provide some additional housing opportunities for our program participants.

Program Owner Engagement

PHAs should periodically conduct surveys designed obtain feedback and information as it relates to program interaction, HCV business processes, and tenant relations. The results should be tabulated and identify trends that challenge owners that are impacted by customer service satisfaction levels. And, an analysis should be done to conduct and determine the way to enhance the HCV owner experience on the program. So, those are going to help retain participants. We want to get as much information from your owners as possible. I know sometimes we don't like to have them come into the office and complain. So, this is where you can use surveys, especially if you're using email blast, or if you're using a portal, you can set it up to where surveys can be sent to owners after they have some sort of interaction with the agency to determine how they feel about customer service that they received. Focus groups with property owners and managers can be used to engage in dialogue, allowing the agency to receive feedback while building rapport. This allows a different level of connection with the agency, and these focus groups can be scheduled after you do some initial analysis of your survey results to kind of hone in and address specific concerns or suggestions for improvement. These sessions can focus on elements of the programs such as inspection policies, rent determination, proposed administrative plan changes, or could be open forums to gather all possible areas of concern and interest within your owners. Additionally, the PHA should assess the owners' and property managers' experience and solicit feedback during these focus group and provide that information to those that can make operational enhancements. Looking at what is the wait time when someone comes into the office? How long does it take for a RFTA to go through the leasing process and for owners to receive their first Housing Assistance Payment? So, this information can be gathered to really look at a lot of your processing interacting with your owners. Another thing you could do is establish an honorary advisory council or resource council or landlord, whatever you want to call it, to engage with your landlord body. And, the council allows the owners a voice and allows them to share all their challenges, as well as proposed solutions, because you don't want it to just be a session where people are coming in fussing and complaining. If you're going to have this specific group put together, you want to empower them to suggest things that will make their experience better. These smaller groups of owners can work and coordinate with the agency, and they give the bigger landlord population advocacy group reports, while giving the housing authority a group to work with and build rapport with that can share the intentions of the PHA with your greater landlord population. It also allows for greater brainstorming for solutions, that identify incentives that maybe specifically needed within your jurisdiction. We can come up with some overall instances, and I'll share them shortly. But when you're communicating with the owners that are within your jurisdiction,



listening to them--what you think they may need may or may not be exactly what they're looking for, or what they want to participate with your agency on a more consistent basis.

Customer Services

Understanding that property owners have varied experiences based on their understanding and time on the program as well as the size of their portfolio should be given consideration on how to best meet the needs of your program owners, as well as foster positive relationships and encourage continued participation. With that in mind, an elevated customer service model could be implemented. You might want to establish a customer service call center. This would have someone that's available specifically to address owner needs and understand the nuances of the owners' participation on the program. Or you may want to create an owner liaison role. This is going to be a dedicated staff member that has extensive HCV Program knowledge, strong customer service skills, and is equipped with the necessary tools to assist owners and agents regarding program inquiries.

They also can be used to verify allegations submitted by an owner and take any actions that are needed to remedy that. Owner liaisons should be able to review all systems used by the agency and their appropriate department. So for example, they should know how to use your system or record but also understand if you're using a system for determining rent. What is the criteria used for let's say Section 8. They need to understand the nuances of how each sect within a process impacts the owner so that they can provide better clarity or make a determination if the agency may need to take another look at the action that they took. And then larger agencies may want to create a whole owner services team or department that's directly focused on owners and the overall needs of participating owners while addressing prospective owners and other community interests. And that team could be comprised of owner liaisons, owner and community outreach coordinators, and customer service representatives.

Owner Portals

There are two major complaints from property owners when it comes to interacting with housing authorities. It's a lack of transparency typically and getting information as well as it's difficult to navigate the processes to get their units leased. But, there's one solution that can comprehensively address both of those concerns. And, that's the utilization of an owner portal or a landlord portal. This going to promote greater HCV Program efficiency for the owners and the agencies overall and enhance their customer service. And so, some useful features for our portal includes letting owners know what units are active on the program; for those units, what is the tenant portion and HAP payment; giving them information in general over their payments when they're received; what that payment month is for; who is included in that payment; any pending contracts; or where something is within a move process; the status of rent increases or requesting rent increases; information on HQS inspections appointment statuses; the ability to initiate program activities online whether it be a rent increase, submitting a RFTA, things of that nature; to communicate program information; provide resources, so having somewhere where they



can get frequently downloaded forms or links that will help them with managing their property; Or if you have a portal that's sophisticated enough to have the ability to accept messages or send replies back to the owners.

Online Forms

Next is online forms. While your agency decides if they're going to leverage portals to increase function, or just simply increased functionality of the website, the use of online forms will provide relief to owners and staff when it comes to the move process, rent increases, and other ongoing program activities. So in addition to making commonly-used forms available, complex forms should have detailed instructions on how to complete them to make sure they're completed accurately. Fillable forms can help in ensuring this. So instead of just having blank form, having a fillable form where they can tab across to the specific lines and make sure all required fields are completed is helpful, as well as online form submission that gives the owner the flexibility to submit necessary forms electronically without having to come into the office. Another thing is implementing electronic signatures. It provides enhanced service by removing the need to download a form or print a form and then upload the form. They simply can fill it out online, sign it, submit it to the agency.

Owner Incentives – Participation Incentives

While we know some of the housing authorities may not have this flexibility of moving to worker or MTW agencies, there are some owner initiatives that can be implemented with minimal fiscal burdens. And some of these will be promoting to owners that they can list their units online. This may be a web-based service, or if they just want to list their units, maybe you have somewhere on site that they can put their listings where families can come in and see them. Prescreened participants, you can offer prescreening to your owners, telling them some basic information used for determining suitability during the tenant selection process.

You can look into expediting processes. This may be something that you want to use for owners that continually lease on the program. This can be related to unit screening, when that owner keeps their unit on there. You may choose to look at certain criteria for those owners annually as opposed to reviewing their unit screening at each tenant lease up. Now keep in mind if you're going to implement any of these incentives and they require a modification to your admin plan, you'll want to consider that when you implement these incentives.

Owner Incentives – Financial Incentives

Now, there's some financial incentives that you can think about as well if you have the flexibility to implement these. These can be vacancy payments.



This is typically a payment made to an owner who experiences a vacancy between leasing HCV participants. You may want to determine what kind of qualifications the owner has to meet in order for this vacancy payment. It can be released into HCV participants consecutively or leasing to HCV participants within a specific number of days or a time frame. You can look into doing a unit restoration funding fund. These are monies that could be available to an owner to get their unit back online quickly and make sure that it's rent-ready for the next HCV participant. You can have signing bonuses for new owners who have not previously participated in a HCV Program. And then also, promoting state- and city-funded tax savings programs. Some localities offer tax abatements to owners who rent to HCV participants within qualifying areas. So, those are a few financial incentives that your agency may want to consider incorporating in their administrative plan.

CARES Act & Leasing

Also quickly, I want you to keep in mind that the Cares Act admin fees can be used to retain and support owners and landlords. You can take a look at PIH Notice 2020-18, which also cross references all previous guidance as well. You can utilize the link here or just simply search for PIH Notice 2020 dash 18 for information on that.

Panelist Discussion

So at this time, I know I shared a lot of information about this, but I want to take a moment to go ahead and pass the mic over to Ryan Creech from the Atlanta Housing Authority, so he can share some of their owner leasing strategies. Ryan? I'm just saying I'm so excited about being here. And I'm so excited about this. It was the number one thing on you guys first review that Candice gave. And since the polling was so close to each other, we were within 60 polls of each item, I want to go over--I've actually outlined them so I won't be too wordy. But I want to go over each thing starting with outreach and education initiatives. What we've done in Atlanta Housing--you were talking about the education initiative. So, we actually had an inspection certification for landlords to learn the ins and outs of our enhanced inspection standards that we use at Atlanta Housing. These standards are our--or this class for the standards is built in to make you where you pass the first time. But guess what, when you pass the first time if it's a single-family unit, we offer a first-time pass bonus, go to market adjustment incentive. This passing the first time gets you \$250 bucks. So, there you go, you just go ahead and chalk that up to incentives to encourage participation. Next, we add new stories to the owner portal. And I'm gonna beat this in for Candice, because

Candice is with CVR and Associates, and CVR Associates has an amazing portal that we actually chose over the portal that we had had in the past, because we're able to put new stories on there. We're keeping landlords up to date on hot topics, on anything new we have. It has interactive ways you can click the links and go to where you want to go. You can link it to different things in your resources section.



With the education side, she was talking about having an owner survey. We have a yearly owner survey that we ask--every single year three or four questions we ask, but then, we thought it wasn't enough. So, if you came in our office pre-COVID, we have a check-in system that you checked in before you met with your representative. And after, he would email you a survey with just two questions: Do you think you were taken care of today? How was your service? Would you like to add some more? And, it was great. It's the surveys that make the difference. The problem is no one wants to actually do them. But when you get them when they're one or two questions, it's much easier. Those Google surveys, did you enjoy everything? Thumbs up, thumbs down. We wanted that one. So actually when we come back to the office, we're going to actually adjust, I believe, to a one question up or down survey. Did you get the service you want? Or do you not get the service you want? It's kind of a one little question survey type thing. And we'd reach out to those that weren't happy.

So, I hope that's good on outreach and education. I want to go to streamlining processes real quick. So, the biggest thing is...With streamlining processes, you're thinking about what owners want; they want to be able to lease up fast. They want to be able to lease up like it's the private market. The leasing up like the private market--we created an expedited lease up process, and self-certification process. So for high-performing properties who are on the HCV that are multi-family who meet our inspection standards, pretty much our property assessment, which I don't know if you guys do those. We assess all properties that are multi-family to ensure that they meet a certain percentage from 89 all the way up until 100. If you meet the percentage from 89 to 95%, you can self-certify your inspections. Self-certification of inspections is awesome. You don't have to have your unit inspected before you move into the unit. You submit an RTA, and with us, we have rent schedules determined so there's no determining the rent after you get all the way through. We got a schedule processed already for your multi-family unit. We have the rent already. Inspection is self-certified. You send the self-certification document. You'll be leased up in about 10 days. After that, with self-certification, we go back to the unit within 45 to 60 days and we inspect it when the tenant's there. If something's wrong then, then you can fix it. But we let you self-certify because we already did a property assessment on the unit. With expedited lease-up, these are for our high-performing properties. What's even better is they write their Housing Choice Rental Assistance Agreement and Lease Addendum for us and fill everything in. They do not have to have a first inspection. The only inspection they will have is when they have an annual inspection close to five to 12 months later. They would have an annual inspection but no inspection is needed. We have a rent schedule determined, and you wrote this lease already. We leased you up within five to seven days. That's what landlords want. They want to know, can we lease up like private markets? And the biggest thing is yes, because the owner portal that we have through CVR actually allows us to grab and view all the documents. We're going to go into the online options, the interactive, this is part of this too. We have two-way communication through our owner portal where we say, hey, you didn't send all this, then you send it back. They can attach, send back a messages, see the messages we send them, they get alerts via email, and we get all the documents we need to make it faster. This calling landlords on the phone or emailing them and waiting for them to come back--you don't know if you got the document; somebody went out on leave; you never know. With the portal, everything's in there for us. This owner



portal that Candice is talking about--it doesn't have to be CVR. I have to push and say we had another portal before. It worked. But we got to custom build this one. And if you can get someone whether it CVR or Yardi or you just have an IT team that's so good to do it, make sure that you have two-way communication, and you have a way to get your documents to you in digital form. We have it set up, where when we get the documents inside, I know you guys are worried about document retention. We have people scanning stuff in and we got to send it to somewhere to retain the documents. We're using Iron Mountain; we're doing these things, the owner portal automatically scans our documents into our document retention server after 18 months. So, we just saved our staff of portfolio administrators all that much time from having to scan the documents. Because interacting with the agency and the owner saying before, you know, the housing authority's just not responsive. They just don't, you know, tell me enough things about where I am. Well, it has trackers inside of it that show when their rent increase was entered, when it was processed, where we are in the request for tenancy approval phase. And it shows it as a, you know, little tracker--like oh, we're at the second phase, your inspection's done; your rent determination is done. It allows your staff not to get all these phone calls asking what's going on. So we're also even going further at my agency by one of the things that Candice was talking about. I think we were talking about landlord liaisons before. We've gone even further. We have housing counselors for the participants; we have portfolio administrators for the landlords, but I have eight portfolio managers that actually are my colleagues, or I guess they're my staff. And a document intake coordinator, who takes everything in. They have split the portfolio of 2500 landlords to give them--this is 2500 paying landlords--the best service possible. Each one has, you know, close to 200 and something landlords, and each person will handle it based on the first letter of their business name or their personal name. So, they handle everything from start to finish: from property owner application to RTA to change of ownership, rent increases, banking changes, updates, anything, but we don't have anything that doesn't come through our portal. We decided back in 2018. We set this portal was up so COVID--this was our problem. We had other staff members and other departments not working. And, they were shut down because we couldn't get the necessary internet technology that we needed to get everybody to work from home. We were already set up working from day one still taking care of the landlords by using all the services that we got just having an owner portal of some dedicated electronic device that works, taking in our documents. So, I want to know that you guys are looking at incentives. I think that was a big thing. Also, here in Atlanta how they were I am, we offer a few incentives that actually keep landlords happy. We use something called a leasing incentive fee. Leasing incentive fee is a fee that we pay you that is nonrefundable in lieu of a deposit for certain individuals on our program, whether it be special programs, people who are on the waitlist to submit an RTA within 30 days, or people who just get the leasing incentive fee based on the necessary need. They have a little more to go through, and I can go through it later, but we're not going to go through it now. But these are things that work. In lieu of deposit, we offer incentives for first time pass inspections. The expedited lease-up we talked about, and we also offer boosts to the rental rate for any units that have green updates, such as sealed windows ENERGY STAR refrigerators, new HVAC, new windows, new insulation. And, we're also working now on those tax abatements that Candice was talking about with the city of Atlanta. We're in the beginning stages. So, I hope I got it all in. I had 90 full seconds, but I think I got



everything that was needed. You guys have any questions, feel free to reach out to me. I know she'll probably give the panelists information later. But thanks, Candice, for having me. Thanks for everyone having me, and we appreciate your time.

Thank you, Ryan. So, Ryan's point is--his excitement with his customized owner portal. I think the biggest takeaway there is utilization of technology to allow efficiencies for the agency and with your landlords, whether it be something as simplistic as making some modifications to your existing website to allow online form submissions, or posting information and resources, using DocuSign or Adobe Sign for electronically signing HAP contracts. Utilizing technology to present ease of collaboration with the agency is critical in leasing effectiveness. I know we only have a few minutes left, but I wanted to see if any of the other panelists wanted to add anything their agencies are doing in this regard.

Hello, Heather Gaines. Just to sort of piggyback on Ryan's exuberant presentation as he always is, really investing in the technology is important. Sometimes you do have to sort of bide your time as far as, can you afford it? Can you not afford it? One of the questions did indicate in there, but it is worth it. But it's not just about having the technology; you need to make sure the technology makes sense. So, you can have all the technology in the world, but remember if it is forward-facing to your clients, it has to be in a format that is easily digestible for them to understand. Because if that's confusing, you really haven't helped them out very much. So that's one of the wonderful things about the move tracker that Ryan was talking about. It's really easy. And keeping things simple is the way to go. Simplify, simplify. This is this is Corliss. Listen, the only thing I would add would be a good market survey and market rental tools.

That makes sense.

Agencies

Alright, well, looks like we've hit the four o'clock hour. And if you guys didn't know, we could talk on and on about leasing strategies and effectiveness. I want to take a moment to thank today's panelists for sharing their expertise with us and all the information.

Questions

I want everyone to remember any remaining questions and all questions, even ones that we may have answered as quickly as we could during today's presentation, will be followed up in an FAQ document that will be posted to HUD Exchange. You'll be able to access the FAQ as well as the recorded webinar in a few weeks. The webinar will stay live for five minutes so you can post any additional questions in the Q&A panel. We want to make sure that we gather every question that you have and provide a detailed response for you when we do post that FAQ to HUD Exchange.



Thank You

With that being said, I want to thank you for participating in today's webinar. And this concludes today's session.

