



HUD Tools & Management Plans

Mike Eddins

CVR Associates, Inc.

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Agenda

This training will discuss how public housing authorities (PHAs) can improve Housing Choice Voucher (HCV) utilization using the available tools from HUD (Department of Housing and Urban Development). Additionally, this webinar will review how PHAs can plan to maximize the utilization of their HCV Program.

1. Introduction
2. Two-Year Tool
3. Conversion Activities
4. Payment Standard Analysis
5. Management Plans
6. Question & Wrap Up



Webinar Facilitator



Mike Eddins
Vice President



CVR Associates, Inc.
Alpharetta, GA



Former HCV Director. More than 18 years of public housing experience with extensive knowledge of SEMAP requirements, HUD guidelines, and Housing Choice Voucher regulations. HUD TA provider for PHAs regarding HCV Utilization.

Specialties: SEMAP, HCV Program Administration, Project Based Vouchers, Relocation, and HCV Utilization





HUD Two-Year Tool

Why Utilize the Two-Year Tool?



Plan for how many vouchers PHAs can issue based on how much funding they have available.

Utilize the data to make operational decisions including staffing capacity, funding requests, ability to project-base vouchers, and decisions regarding portability.

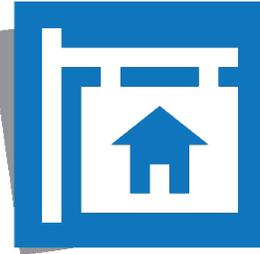
Understand how to address public housing conversion actions.

Ensure SEMAP (Section Eight Management Assessment Program) success.

Utilization Planning: Key Performance Indicators



Success
Rate



Annual
Turnover
Rate



Voucher
Issuance to
HAP Contract



Per Unit
Cost

Success Rate

Success rates inform PHAs how successful voucher holders are when searching for a unit.

Why is That Important?

It tells a PHA how many vouchers they need to issue to be able to lease up available vouchers.

For example:

If a PHA needs to lease up 25 vouchers per month, their success rate tells how many vouchers they need to issue to be able to lease up 25 vouchers.

Program Projection Variables			
Success Rate	38%	Annual Turnover Rate	8.0%



Success Rate

If a PHA needs to lease up 25 vouchers and have a success rate of 25%, they need to issue 100 vouchers.

If a PHA needs to lease up 25 vouchers and have a success rate of 50%, they need to issue 50 vouchers.

If a PHA needs to lease up 25 vouchers and have a success rate of 75%, they need to issue 33 vouchers.

Program Projection Variables			
Success Rate	38%	Annual Turnover Rate	8.0%



Success Rate Tracking

To track success rates, PHAs can review their software to see if a report will provide this information (Yardi has a report like this).

If the PHA's software does not track this information, utilize the Two-Year Tool.

The **Success Rate Tracking** tab is sometimes a hidden tab in the Two-Year tool. To access it:

1. Right click on any of the tabs at the bottom of the workbook.
2. Click on “unhide”.
3. Scroll down until you find the **Success Rate Tracking** workbook.



				2022											
?s	Enter First Year														
Issuance Month	VOs Issued	VOs Leased	VOs Failed	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
Jan-22		0													
Feb-22		0													
Mar-22		0													
Apr-22		0													
May-22		0													
Jun-22		0													
Jul-22		0													
Aug-22		0													
Sep-22		0													
Oct-22		0													
Nov-22		0													
Dec-22		0													

Success Rate Tracking

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	?s	Enter First Year			2020											
2	Issuance Month	VOs Issued	VOs Leased	VOs Failed	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
3	Jan-20	25	15	10		5	2	6	1	1						
4	Feb-20	30	23	7			6	3	6	2	6					
5	Mar-20	55	36	19				9	10	6	6	5				
6	Apr-20		0													
7	May-20		0													
8	Jun-20		0													
9	Jul-20		0													
10	Aug-20		0													
11	Sep-20		0													
12	Oct-20		0													
13	Nov-20		0													
14	Dec-20		0													
15	Jan-21		0													

Success Rate Tracking

Success Rate Tracking



Summary Results							
Issuance Month	Success Rate	% in 30 days	% in 30-60 Days	% in 60-90 Days	% in 90-120 Days	% in 120-150 Days	Avg. Months
Jan-20	60.0%	33.3%	13.3%	40.0%	6.7%	6.7%	2.4
Feb-20	76.7%	26.1%	13.0%	26.1%	8.7%	26.1%	3.0
Mar-20	65.5%	25.0%	27.8%	16.7%	16.7%	13.9%	2.7
Apr-20							
May-20							
Jun-20							
Jul-20							
Aug-20							
Sep-20							
Oct-20							
Nov-20							
Dec-20							
Jan-21							
Feb-21							
Mar-21							
Apr-21							
May-21							
Jun-21							
Jul-21							
Aug-21							
Sep-21							
Oct-21							
Nov-21							
Dec-21							
Cumulative	67.3%	27.0%	20.3%	24.3%	12.2%	16.2%	2.7

Program Projection Variables			
Success Rate	70%	Annual Turnover Rate	6.3%
			PIC EOP % as of 9/30/2021 (298 EOPs): 6.56%

Time from Issuance to HAP Effective Date (Current: 2.28 months)		
% leased in 30 days	18%	*Estimated* 2022 Inflation 10.3%
% leased in 30 to 60 days	40%	
% leased in 60 to 90 days	38%	
% leased in 90 to 120 days	4%	
% leased in 120 to 150 days	0%	



Success Rate Tracking from the Waiting List

Wait List Issuance Rate					
Date	Cohort	Pulled	Issued	Failed	%
5/2/2022	Pull 1	200	100	100	50.0%
	Pull 2				
	Pull 3				
	Pull 4				
	Pull 5				
	Pull 6				
	Pull 7				
	Pull 8				
	Pull 9				
	Pull 10				
	Pull 11				

Monitoring this data allows the PHA to determine how many names to pull from the waiting list to issue vouchers.

By tracking this data, PHAs can determine the level of staffing needed.



Success Rate in Practice

The number of vouchers to be issued determine how many applicants need to be pulled from the waiting list as well as the strength of the waiting list.

Vouchers to Lease	Success Rate (WL)	Success Rate (Vouchers)	Applicants to Pull from WL	Staffing
25	75%	75%	44	.5
25	50%	50%	100	1
25	25%	25%	200	2

Success Rate in Practice

Vouchers to Lease	Success Rate (WL)	Success Rate (Vouchers)	Applicants to Pull from WL	Staffing
25	75%	75%	44	.5
25	50%	50%	100	1
25	25%	25%	200	2

If a PHA needs to lease 25 vouchers per month, staff will need to determine how many applications they will go through in comparison to how many names are on the waiting list.

For example, if a PHA needs to lease 25 vouchers per month and have 25% success rates for vouchers and waiting list eligibility, it will need **2,400** applicants on the waiting list for a **12-month** period.



Success Rate in Practice

Vouchers to Lease	Success Rate (WL)	Success Rate (Vouchers)	Applicants to Pull from WL	Staffing
5	75%	75%	9	.1
5	50%	50%	20	.2
5	25%	25%	40	.4

If a PHA needs to lease 5 vouchers per month, then staff will need to determine how many applications they will go through in comparison to how many names are on the waiting list.

For example, if a PHA needs to lease 5 vouchers per month and have 25% success rates for vouchers and waiting list eligibility, it will need **480** applicants on the waiting list for a **12-month** period.





Improving the Success Rate

Strategies for improved success rates:

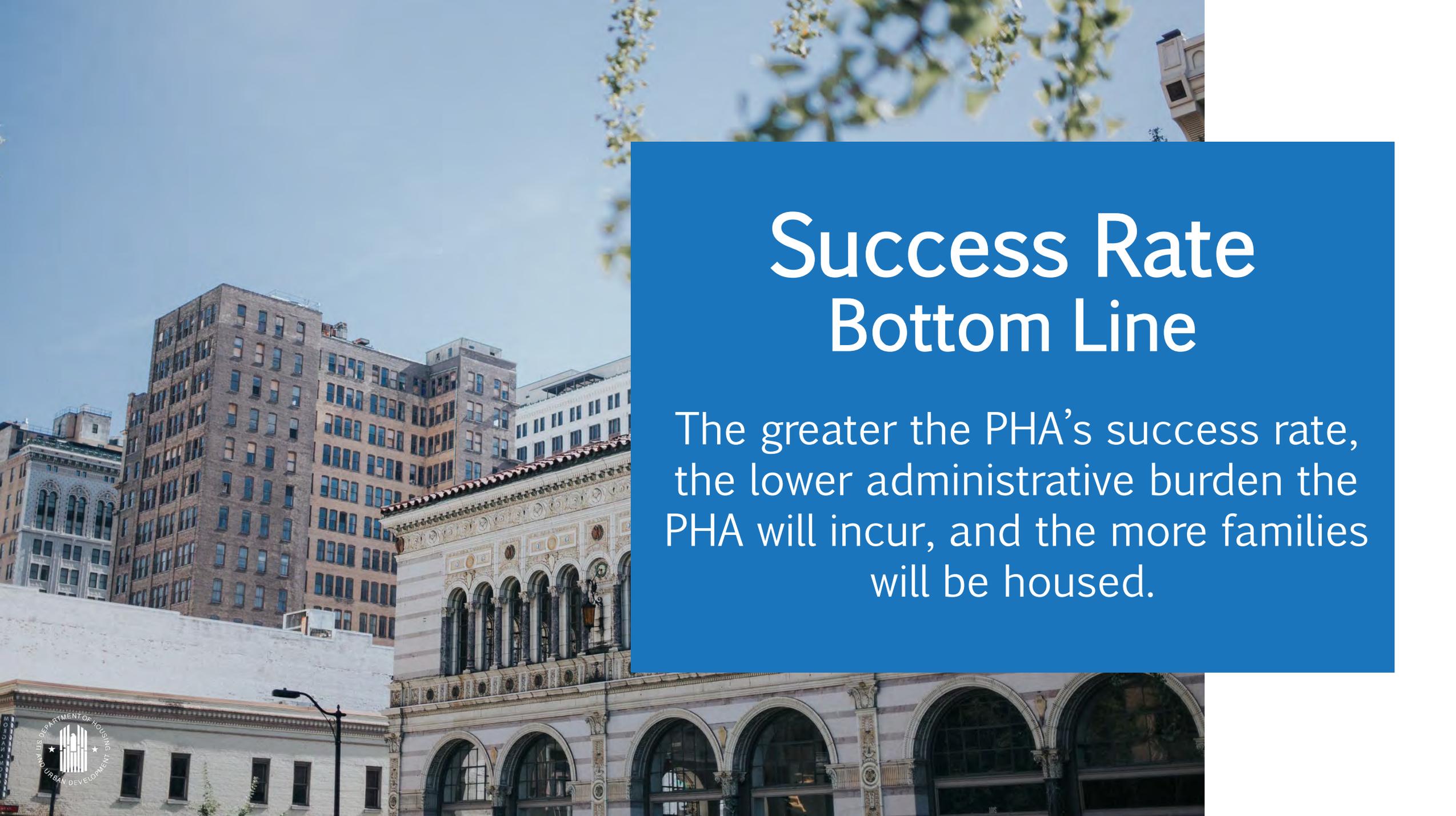
1. Is the rent offered to property owners competitive with the current market?

If not, review rent reasonableness methodology or comparable units that are being used.

2. Is the rental market tight?

If yes, complete these 3 steps:

1. Review landlord outreach strategies.
2. Review PIH Notice 2022 – 18 and assess if you could implement new policies to improve success rates.
3. Determine if you could expand your jurisdiction by discussing with neighboring PHAs.



Success Rate Bottom Line

The greater the PHA's success rate, the lower administrative burden the PHA will incur, and the more families will be housed.



Annual Turnover Rate

- The Annual Turnover Rate determines how many vouchers the PHA loses through the natural attrition of the program.
- The higher the turnover rate, the more vouchers a PHA will need to issue to maintain utilization.

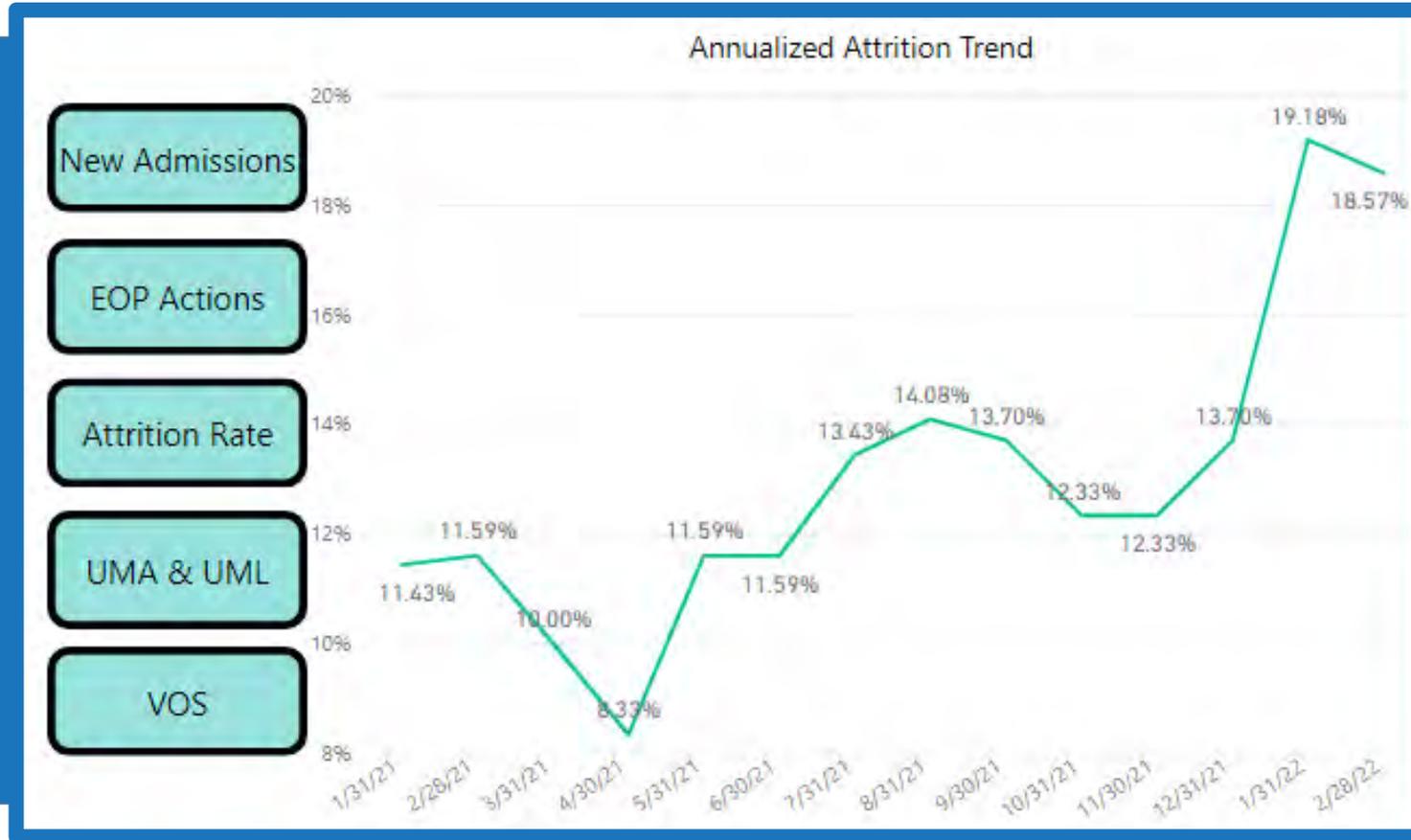
Program Projection Variables			
<u>Success Rate</u>	38%	Annual Turnover Rate	8.0%

Annual Turnover Rate



- The Two-Year Tool generally defaults this rate to the most recent percentage that is based off the number of EOPs (End of Participation) submitted to PIC (PIH Information Center).
- However, this percentage changes on a monthly basis.
- **Recommendation:** Utilize data from the HCV Data Dashboard to determine an average amount over the past 12 months and use that for your turnover rate.

Annual Turnover Rate



HCV Data Dashboard: https://www.hud.gov/program_offices/public_indian_housing/programs/hcv/dashboard

Annual Turnover Rate

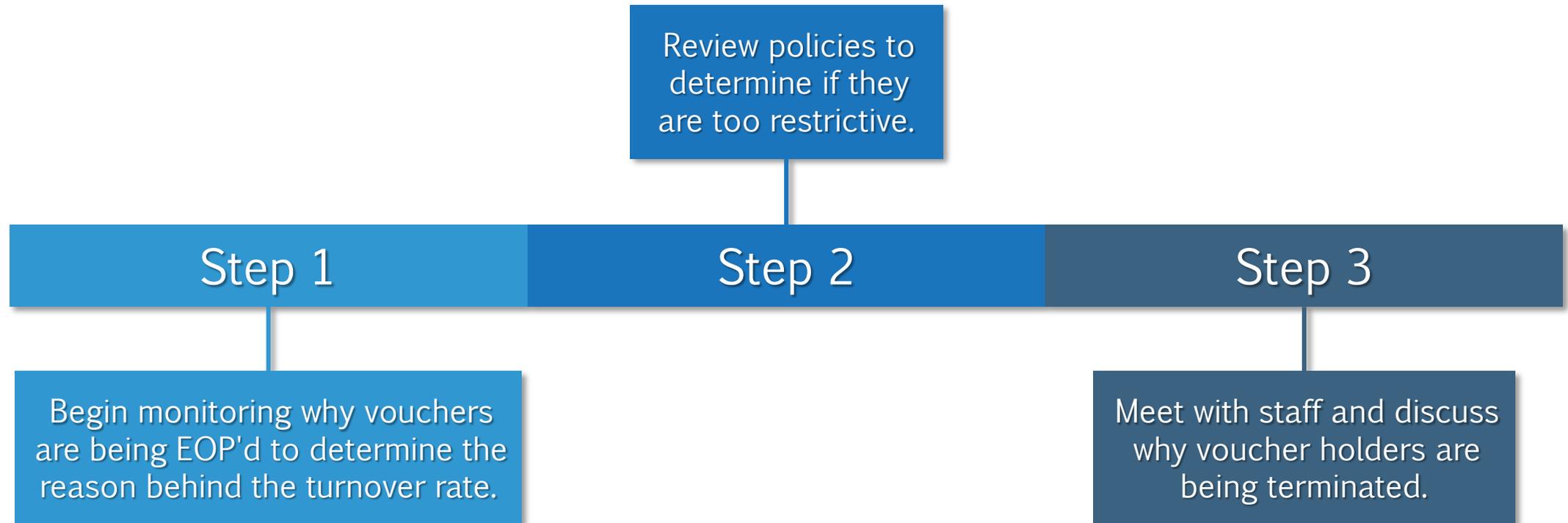
If a PHA is using a turnover rate that is too high or too low, this can put a PHA on the wrong trajectory as it relates to how many vouchers they should be issuing.

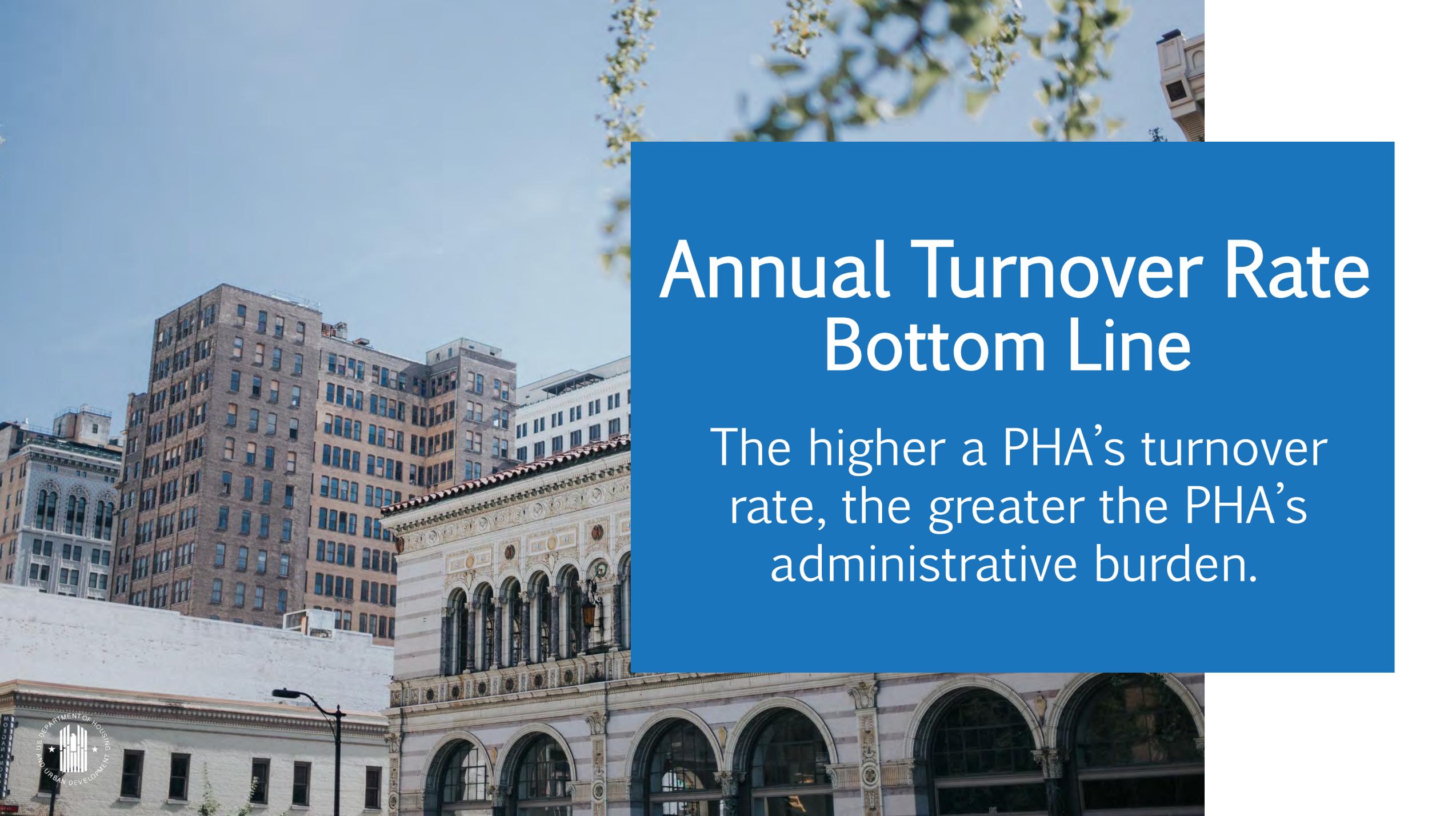
Estimated Attrition	Estimated Attrition
7.5%	10%
-22.7	-30.3
-22.7	-30.2
-22.8	-30.3
-23.0	-30.5
-22.9	-30.2
-22.7	-30.0
-22.6	-29.7
-22.4	-29.5
-181.7	-240.8



Improving Annual Turnover Rate

To improve (lower) the Annual Turnover Rate, the PHA should:





Annual Turnover Rate Bottom Line

The higher a PHA's turnover rate, the greater the PHA's administrative burden.



Success Rate vs. Turnover Rate

Vouchers to Lease	Success Rate (WL)	Success Rate (Vouchers)	Applicants to Pull from WL	Staffing
30	75%	75%	80	0.8
30	50%	50%	120	1.2
30	25%	25%	240	2.4

Estimated Attrition
-30.3
-30.2
-30.3
-30.5
-30.2
-30.0
-29.7
-29.5
-240.8

The turnover rate determines how many vouchers the PHA will need to issue to be able to maintain the stability of their program.



Success Rate vs. Turnover Rate

Vouchers to Lease	Success Rate (WL)	Success Rate (Vouchers)	Applicants to Pull from WL	Staffing
23	75%	75%	61	0.6
23	50%	50%	92	0.92
23	25%	25%	184	1.84

Estimated Attrition
-22.7
-22.7
-22.8
-23.0
-22.9
-22.7
-22.6
-22.4
-181.7

The turnover rate determines how many vouchers the PHA will need to issue, to be able to maintain the stability of their program.



Voucher Issuance to HAP Contract

Voucher issuance to HAP Contract provides information regarding how quickly the applicant is leased up after a voucher is issued.

Summary Results							
Issuance Month	Success Rate	% in 30 days	% in 30-60 Days	% in 60-90 Days	% in 90-120 Days	% in 120-150 Days	Avg. Months
Jan-20	60.0%	33.3%	13.3%	40.0%	6.7%	6.7%	2.4
Feb-20	76.7%	26.1%	13.0%	26.1%	8.7%	26.1%	3.0
Mar-20	65.5%	25.0%	27.8%	16.7%	16.7%	13.9%	2.7
Apr-20							
May-20							
Jun-20							
Jul-20							
<i>Cumulative</i>	<i>67.3%</i>	<i>27.0%</i>	<i>20.3%</i>	<i>24.3%</i>	<i>12.2%</i>	<i>16.2%</i>	<i>2.7</i>

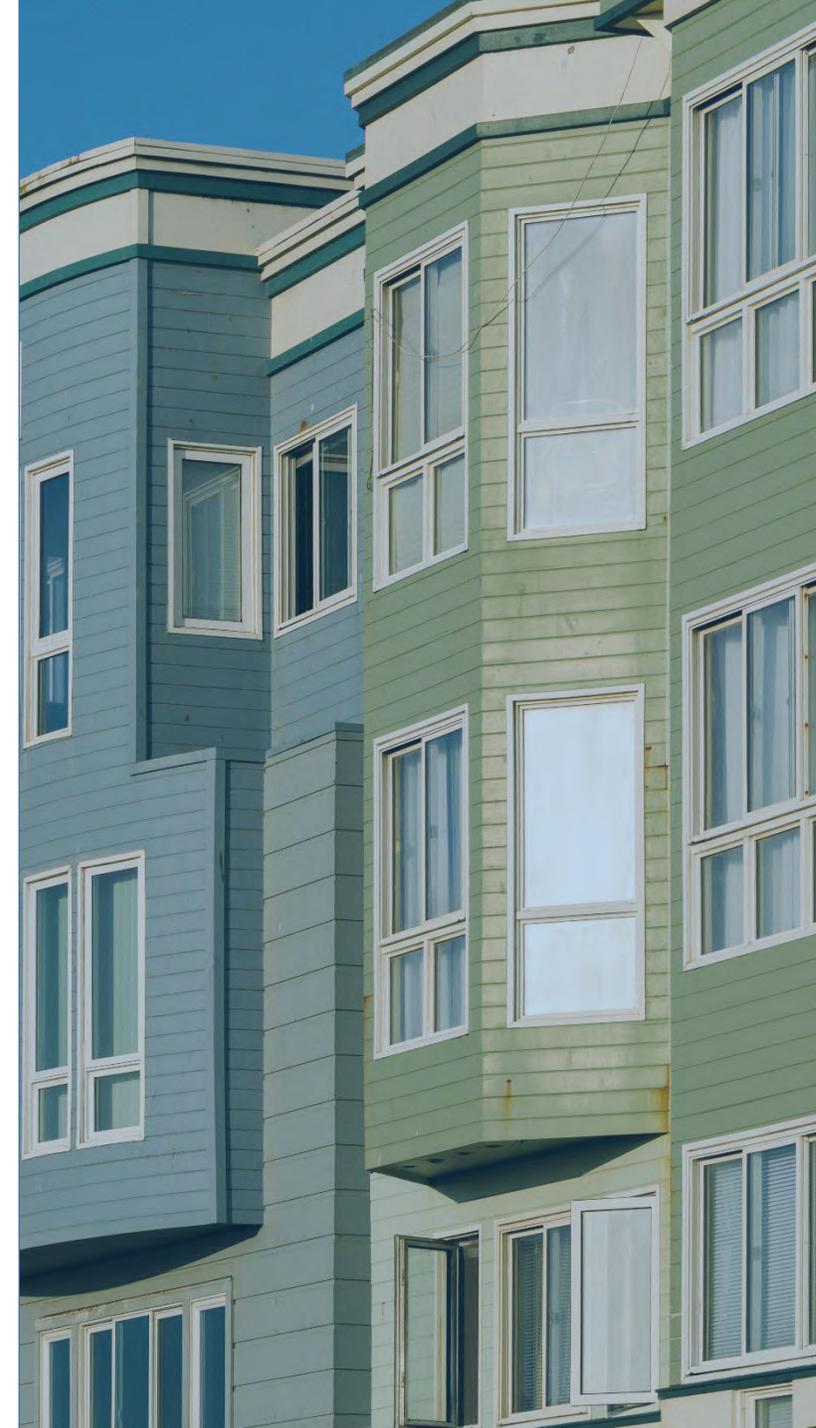
Time from Issuance to HAP Effective Date (Current: 2.28 months)	
% leased in 30 days	18%
% leased in 30 to 60 days	40%
% leased in 60 to 90 days	38%
% leased in 90 to 120 days	4%
% leased in 120 to 150 days	0%

Voucher Issuance to HAP Contract

The longer it takes for an applicant to lease up, the less impactful new vouchers issued will be in the current year.

For example, if 50% of voucher holders lease up in 90 days, this means that vouchers issued in July will not lease up until October.

If a PHA is trying to increase its utilization program in 2022 and has the majority of voucher holders issuing after 90 days, it means 2022 is minimized.



Voucher Issuance to HAP Contract

Voucher issuance to HAP Contract is all about timing. If a PHA needs to lease vouchers, the timeline for when leasing will be effective is important.

For example, if a PHA's lease-up timing has nearly 80% of vouchers issued leasing up in a 60-day period, then vouchers issued in July will most likely lease up in August and September.



Time from Issuance to HAP Effective Date (Current: 1.88 months)	
% leased in 30 days	38%
% leased in 30 to 60 days	40%
% leased in 60 to 90 days	18%
% leased in 90 to 120 days	4%
% leased in 120 to 150 days	0%

Voucher Issuance to HAP Contract

Voucher issuance to HAP Contract is all about timing. If a PHA needs to lease vouchers, the timeline for when leasing will be effective is important.

For example, if a PHA's lease-up timing has nearly 80% of vouchers issued leasing up in a 90-150-day period, then vouchers issued in July will most likely lease up in October, November, and December.



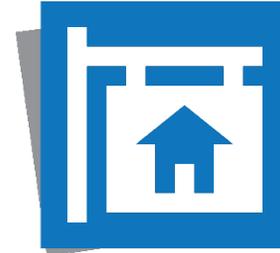
Time from Issuance to HAP Effective Date (Current: 3.59 months)	
% leased in 30 days	4%
% leased in 30 to 60 days	13%
% leased in 60 to 90 days	31%
% leased in 90 to 120 days	26%
% leased in 120 to 150 days	26%

KPI: Bottom Lines



Success Rate

determines how many vouchers to issue



Annual Turnover Rate

determines how many vouchers to issue to maintain current program size



Voucher Issuance to HAP Contract

determines when a PHA needs to issue vouchers and how long before the vouchers actually lease up

Per Unit Cost (PUC)

PUC is the most important thing in the management of an HCV Program and is the average cost per voucher for a program.

PUC is influenced by:

1. Payment standards
2. Utility allowances
3. Rent reasonableness
4. Tenant income

PUC determines how many vouchers a PHA should be issuing based on the amount of funding it has available.

Changes in PUC determine how many vouchers a PHA can afford to issue based on their budget.

PUC: Actual/Projected	Manual PUC Override
\$630	
\$640	
\$637	
\$618	
\$605	
\$615	
\$615	
\$615	
\$615	
\$615	
\$615	
\$615	
\$615	
\$619	



Vouchers Issued/Projected to be Issued	Other Planned Additions/Reductions	New Leasing from Issued Vouchers	Estimated Attrition	UMLs: Actual/Projected	HAP: Actual/Projected	PUC: Actual/Projected	Manual PUC Override
45				602	\$379,243	\$630	
90				598	\$382,846	\$640	
70				601	\$382,979	\$637	
50				601	\$371,381	\$618	
30				611	\$369,724	\$605	
50				631	\$387,779	\$615	
50	1	19	-6.8	645	\$396,147	\$615	
50	1	17	-7.0	656	\$403,150	\$615	
50						\$615	
30						\$615	
30						\$615	
30						\$615	
575						\$619	
30						\$615	
30						\$615	
30						\$615	
30						\$615	
30						\$615	
30						\$615	
30						\$615	
30						\$615	
30						\$615	
30	1	11	-8.1	748	\$459,797	\$615	
30	1	11	-8.1	752	\$462,291	\$615	
360	13	136	-94.2	8,749	\$5,376,400	\$615	

Summary Outcomes [X]

Year-End Outcomes

	2022	2023
UML % of ACC (UMA)	71.2%	81.2%
HAP Exp as % All Funds	87.2%	98.7%
HAP Exp as % of Elig.	100.7%	113.1%
Proj. 12/31 Total Reserves	\$696,669	\$72,659
HAP Reserves - % ABA	16.2%	1.5%



PUC Changes

Vouchers Issued/Projected to be Issued	Other Planned Additions/Reductions	New Leasing from Issued Vouchers	Estimated Attrition	UMLs: Actual/Projected	HAP: Actual/Projected	PUC: Actual/Projected	Manual PUC Override
45				602	\$379,243	\$630	
90				598	\$382,846	\$640	
70				601	\$382,979	\$637	
50				601	\$371,381	\$618	
30				611	\$369,724	\$605	
50				631	\$387,779	\$615	
50				638	\$415,000	\$650	
50	1	17	-6.9	649	\$422,460	\$650	
50	1	17	-7.0	660	\$429,502	\$650	
30	1	18	-7.2	672	\$437,237	\$650	
30						\$650	
30						\$650	
30						\$650	
575						\$638	
30						\$650	
30						\$650	
30						\$650	
30						\$650	
30						\$650	
30						\$650	
30						\$650	
30						\$650	
30						\$650	
30						\$650	
30						\$650	
30						\$650	
360	13	136	-93.4	8,678	\$5,645,085	\$650	

Summary Outcomes ✕

Year-End Outcomes

	2022	2023
UML % of ACC (UMA)	70.9%	80.5%
HAP Exp as % All Funds	89.4%	103.6%
HAP Exp as % of Elig.	103.2%	115.9%
Proj. 12/31 Total Reserves	\$576,923	-\$196,026
HAP Reserves - % ABA	13.4%	-4.0%



PUC Changes

Vouchers Issued/Projected to be Issued	Other Planned Additions/Reductions	New Leasing from Issued Vouchers	Estimated Attrition	UMLs: Actual/Projected	HAP: Actual/Projected	PUC: Actual/Projected	Manual PUC Override
45				602	\$379,243	\$630	
90				598	\$382,846	\$640	
70				601	\$382,979	\$637	
50				601	\$371,381	\$618	
30				611	\$369,724	\$605	
50				631	\$387,779	\$615	
50				638	\$350,000	\$549	
50	1	17	-6.9	649	\$356,291	\$549	
50	1	17	-7.0	660	\$362,230	\$549	
30						\$549	
30						\$549	
30						\$549	
575						\$585	
30						\$549	
30						\$549	
30						\$549	
30						\$549	
30						\$549	
30						\$549	
30						\$549	
30						\$549	
30						\$549	
30						\$549	
30	1	11	-8.0	747	\$409,659	\$549	
360	13	136	-93.4	8,678	\$4,760,915	\$549	

Summary Outcomes ✕

Year-End Outcomes

	2022	2023
UML % of ACC (UMA)	70.9%	80.5%
HAP Exp as % All Funds	81.9%	87.4%
HAP Exp as % of Elig.	94.6%	106.6%
Proj. 12/31 Total Reserves	\$983,867	\$688,144
HAP Reserves - % ABA	22.9%	15.4%



PUC Changes

Per Unit Cost (PUC)

2023	J					
2023	F					
2023	M					
2023	A					
2023	M					
2023	J					

Choose PUC Method **Average Rolling Three-Month Change**

Mate
Ma

Projection Analysis **PUC.RB Analysis** Projection Analysis - Years 3&4 PBV.RAD

Vouchers Issued/Projected to be Issued	Other Planned Additions/Reductions	New Leasing from Issued Vouchers	Estimated Attrition	UMLs: Actual/Projected	HAP: Actual/Projected	PUC: Actual/Projected	Manual PUC Override
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70				601	\$382,979	\$637	
50				601	\$371,381	\$618	
30				611	\$369,724	\$605	
50				631	\$387,779	\$615	
50	1	19	-6.8	645	\$394,787	\$612	\$612
50	1	17	-7.0	656	\$400,387	\$610	\$610
50						\$608	\$608
30						\$606	\$606
30						\$604	\$604
30						\$602	\$602
575						\$615	
30						\$600	\$600
30						\$598	\$598
30						\$596	\$596
30						\$594	\$594
30						\$592	\$592
30						\$590	\$590
30						\$588	\$588
30						\$586	\$586
30						\$584	\$584
30						\$582	\$582
30						\$580	\$580
30	1	11	-8.1	748	\$433,691	\$580	\$580
30	1	11	-8.1	752	\$434,546	\$578	\$578
360	13	136	-94.2	8,749	\$5,149,333	\$589	

Summary Outcomes ✕

Year-End Outcomes

	2022	2023
UML % of ACC (UMA)	71.2%	81.2%
HAP Exp as % All Funds	86.7%	94.5%
HAP Exp as % of Elig.	100.0%	109.0%
Proj. 12/31 Total Reserves	\$726,668	\$299,726
HAP Reserves - % ABA	16.9%	6.3%



PUC Changes

Vouchers Issued/Projected to be Issued	Other Planned Additions/Reductions	New Leasing from Issued Vouchers	Estimated Attrition	UMLs: Actual/Projected	HAP: Actual/Projected	PUC: Actual/Projected	Manual PUC Override
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30						\$615	
30						\$615	
30						\$615	
575						\$619	
30						\$615	
30						\$615	
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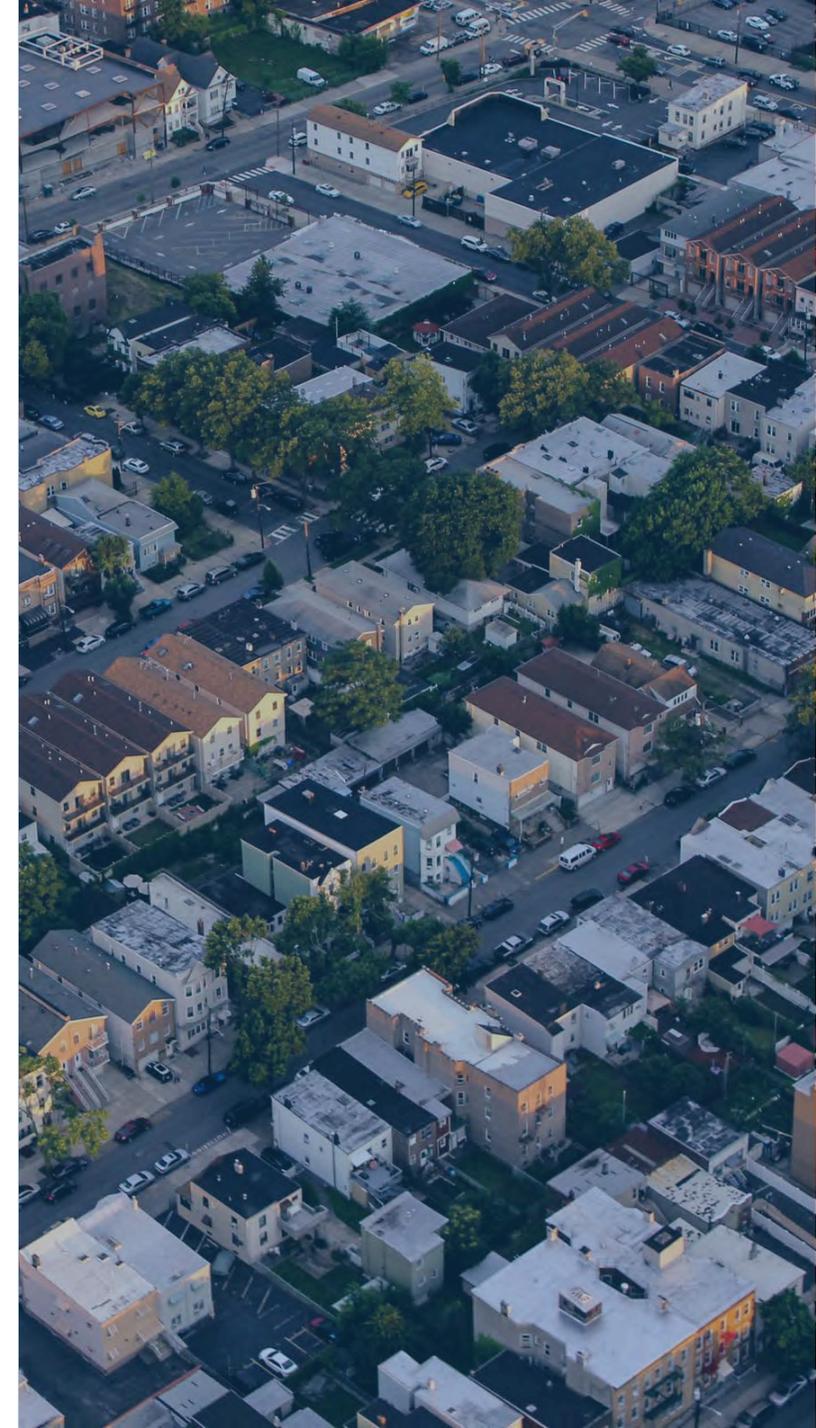
PUC Changes

Other Important Factors

1. **Public Housing Conversion Activities:** RAD will *increase* a PHA's PUC if the property is going through a rehab or *decrease* the PUC if it's an in-place conversion.
2. **Portability:** Port-outs generally result in the PHA paying high HAP costs, which can bring up a PHA's PUC. Additionally, if you have a lots of ports being administered by another PHA, then they could easily absorb them at any point, which could negatively influence a PHA's utilization.

Set-Aside Funding: PIH Notice 2022-14

1. Increases in PUC that are beyond approved 2022 funding may result in the PHA requesting set-aside funding. Application is due **September 30, 2022**.
2. PBV units under an AHAP can qualify a PHA for set aside.



Set-Aside Funding



Set-aside funding allows PHAs to issue more vouchers or maintain their current voucher size.

1. Increases in the number of vouchers leased increases the amount of administrative fees earned.
2. Decreases in the number of vouchers leased decreases the amount of administrative fees earned.

Set Aside Funding	\$0		
-------------------	-----	--	--



Conversion Activities

RAD rents are generally below the FMR (Fair Market Rent), resulting in the PUC for RAD units to be lower than the regular HCV Program.

If a PHA closes their RAD deal in 2022, it will impact their utilization in 2023. The PHA will receive the additional vouchers and funding in January 2023.

If the PHA is redeveloping the property, they will be making a Rehab Assistance Payment (RAP).

The RAP to the property will be entered into VMS (Voucher Management System) and reflected as HAP; however, the vouchers will be unutilized.

A photograph of a multi-story brick building with several bay windows, serving as the background for the slide.

Impact of RAD
Conversions on PUC

Impact of RAD Conversions on the PUC

An in-place conversion:

Oct-22	432	313	\$109,071	15				313	\$109,071	\$348
Nov-22	432	314	\$109,072	10				314	\$109,072	\$347
Dec-22	432	315	\$109,073	10				315	\$109,073	\$346
<i>Total</i>	<i>5,184</i>	<i>3,711</i>	<i>\$1,288,144</i>	<i>196</i>	<i>0</i>	<i>0</i>	<i>0.0</i>	<i>3,711</i>	<i>\$1,288,144</i>	<i>\$347</i>
2023										
Jan-23	486	369	\$125,273	10				369	\$125,273	\$339
Feb-23	486			10		5	-4.9	369	\$125,254	\$339
Mar-23	486			10		5	-4.9	369	\$125,111	\$339
Apr-23	486			10		5	-4.9	368	\$124,971	\$339

How does this change the PUC?

Impact of RAD Conversions on the PUC

A RAD rehab with RAPs:

Oct-22	432	313	\$109,071	15				313	\$109,071	\$348
Nov-22	432	314	\$109,072	10				314	\$109,072	\$347
Dec-22	432	315	\$109,073	10				315	\$109,073	\$346
<i>Total</i>	<i>5,184</i>	<i>3,711</i>	<i>\$1,288,144</i>	<i>196</i>	<i>0</i>	<i>0</i>	<i>0.0</i>	<i>3,711</i>	<i>\$1,288,144</i>	<i>\$347</i>
2023										
Jan-23	486	315	\$125,273	10				315	\$125,273	\$398
Feb-23	486			10		5	-4.2	316	\$125,537	\$398

How does this change the PUC?

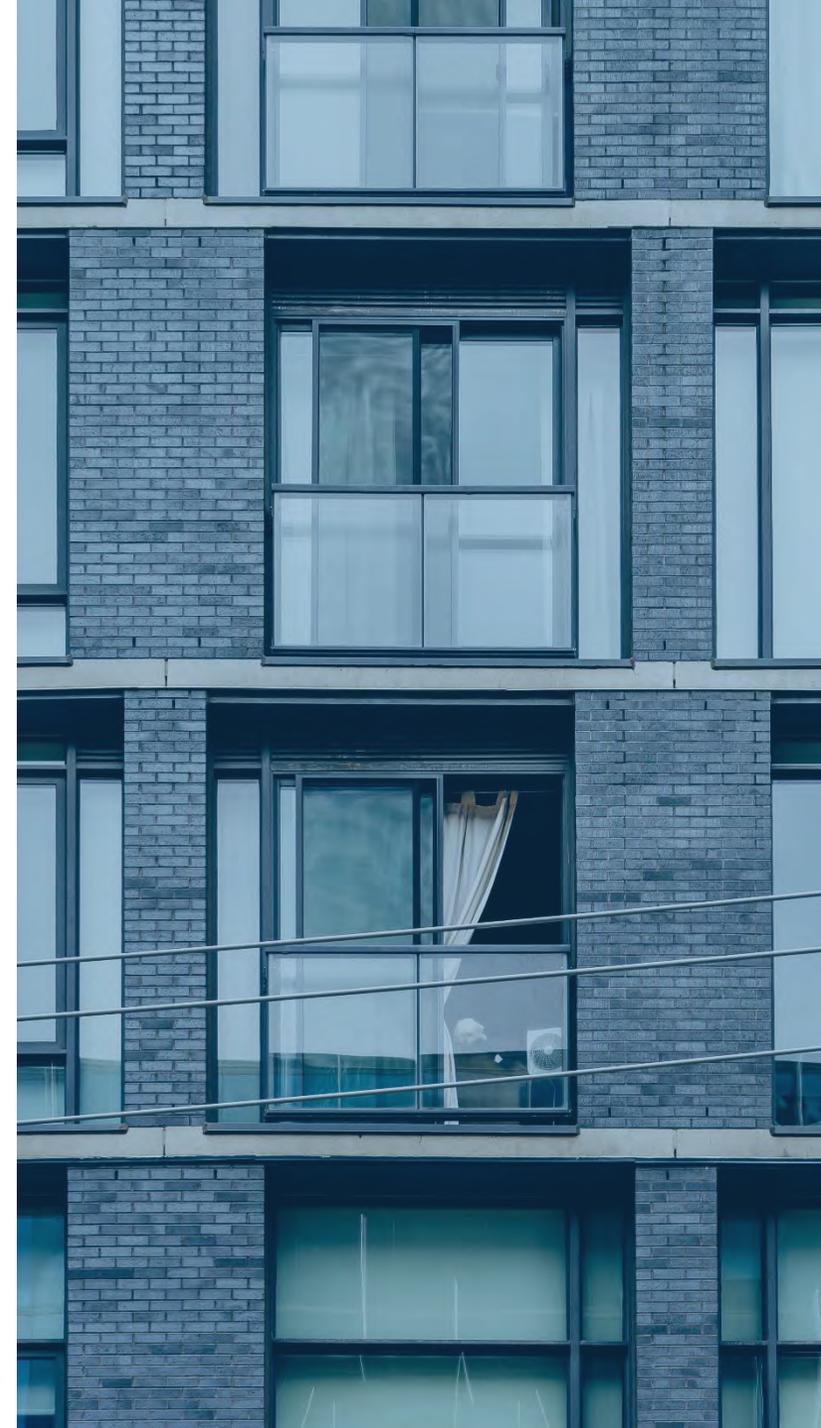
Other Impact of Conversions

Tenant-Protection Vouchers (TPVs) Through Section 18 Conversions

1. The PHA receives 200 new TPVs through Section 18.
2. Initial thought is, “Okay, issue vouchers and relocate the residents.”

Problems:

1. PHAs will receive vouchers for every unit that has been occupied over the past 24 months.
2. Unless the property is 100% occupied, the PHA will receive additional vouchers that operate like HCV.
3. Relocating residents with TPVs is not easy.
4. Plan on applying the success rate to the TPVs received so that the PHA issues additional vouchers along with the TPVs to avoid a drop in the PHA’s utilization.



TPV – Apply KPI's

Vouchers to Lease	Success Rate (Vouchers)	Likely to Lease
25	75%	18
25	50%	13
25	25%	6

- What options should you be using?
- How long is this going to take?

Time from Issuance to HAP Effective Date (Current: 3.59 months)	
% leased in 30 days	4%
% leased in 30 to 60 days	13%
% leased in 60 to 90 days	31%
% leased in 90 to 120 days	26%
% leased in 120 to 150 days	26%

Time from Issuance to HAP Effective Date (Current: 1.88 months)	
% leased in 30 days	38%
% leased in 30 to 60 days	40%
% leased in 60 to 90 days	18%
% leased in 90 to 120 days	4%
% leased in 120 to 150 days	0%

Conversions Bottom Line Impact

Communication and planning cannot be done in a vacuum.

Conversion activities that involve vouchers are going to significantly impact the PHA's HCV utilization.

Make sure the development side of the PHA talks to the HCV side of the PHA whenever discussing any type of conversion activities.

Understand the timing of the activities from the conversion and HCV perspective.



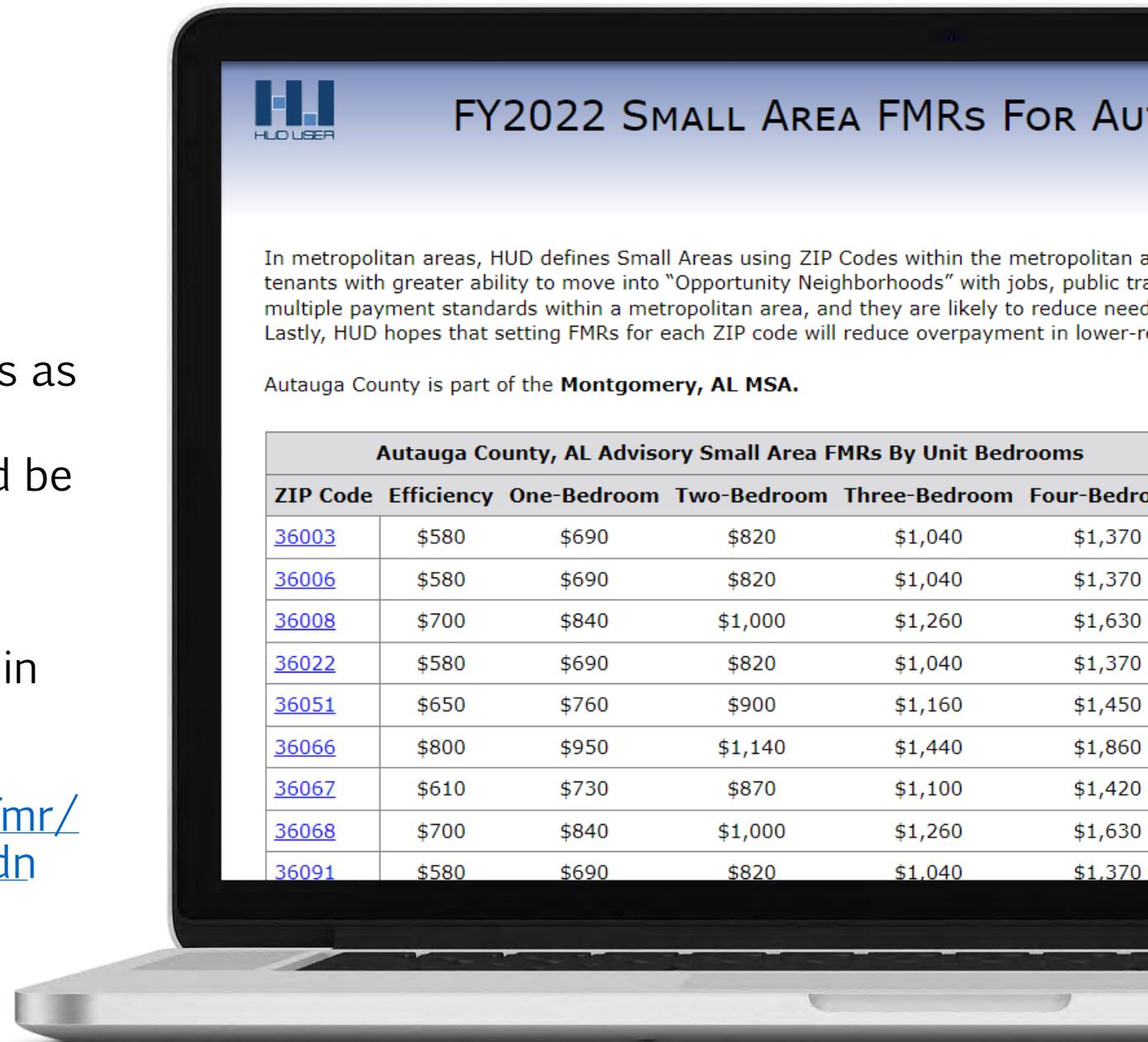
HUD Tool of Tools: Payment Standard Analysis

Payment Standards Small Area FMR

This could be additionally beneficial for PHAs as SAFMRs (Small Area Fair Market Rents) are based on Zip Codes where some areas could be higher cost.

Payment standards for 2022 were published in October 2021.

https://www.huduser.gov/portal/datasets/fmr/fmrs/FY2022_code/select_Geography_sa.odn



HUD USER

FY2022 SMALL AREA FMRs FOR AU

In metropolitan areas, HUD defines Small Areas using ZIP Codes within the metropolitan area to serve tenants with greater ability to move into "Opportunity Neighborhoods" with jobs, public transportation, and multiple payment standards within a metropolitan area, and they are likely to reduce need for rental assistance. Lastly, HUD hopes that setting FMRs for each ZIP code will reduce overpayment in lower-rent areas.

Autauga County is part of the **Montgomery, AL MSA**.

Autauga County, AL Advisory Small Area FMRs By Unit Bedrooms					
ZIP Code	Efficiency	One-Bedroom	Two-Bedroom	Three-Bedroom	Four-Bedroom
36003	\$580	\$690	\$820	\$1,040	\$1,370
36006	\$580	\$690	\$820	\$1,040	\$1,370
36008	\$700	\$840	\$1,000	\$1,260	\$1,630
36022	\$580	\$690	\$820	\$1,040	\$1,370
36051	\$650	\$760	\$900	\$1,160	\$1,450
36066	\$800	\$950	\$1,140	\$1,440	\$1,860
36067	\$610	\$730	\$870	\$1,100	\$1,420
36068	\$700	\$840	\$1,000	\$1,260	\$1,630
36091	\$580	\$690	\$820	\$1,040	\$1,370

Payment Standards

Payment standards are generally set between 90%–110% of the FMR of SAFMR for the jurisdiction

Payment standards for 2022 were published in October 2021.

<https://www.huduser.gov/portal/datasets/fmr.html>

HUD USER FY2022 SMALL AREA FMRs FOR AU

In metropolitan areas, HUD defines Small Areas using ZIP Codes within the metropolitan area to help tenants with greater ability to move into "Opportunity Neighborhoods" with jobs, public transportation, and other amenities. HUD sets multiple payment standards within a metropolitan area, and they are likely to reduce need for rental assistance. Lastly, HUD hopes that setting FMRs for each ZIP code will reduce overpayment in lower-rent areas.

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ZIP Code	Efficiency	One-Bedroom	Two-Bedroom	Three-Bedroom	Four-Bedroom
36003	\$580	\$690	\$820	\$1,040	\$1,370
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36008	\$700	\$840	\$1,000	\$1,260	\$1,630
36022	\$580	\$690	\$820	\$1,040	\$1,370
36051	\$650	\$760	\$900	\$1,160	\$1,450
36066	\$800	\$950	\$1,140	\$1,440	\$1,860
36067	\$610	\$730	\$870	\$1,100	\$1,420
36068	\$700	\$840	\$1,000	\$1,260	\$1,630
36091	\$580	\$690	\$820	\$1,040	\$1,370



Payment Standards

Why do payment standards matter?

They determine the maximum amount of subsidy that a family can receive.

What happens when the payment standard goes up?

Generally, when the payment standards go up, the PUC goes up. Per Unit Costs are monitored in the HUD Two-Year Tool.

When the payment standard goes up, the PHA's HAP expenses go up.

Payment Standard Analysis Tool

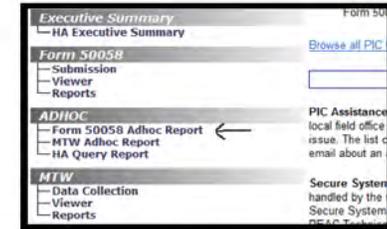
- Go into PIC.
- Select Ad Hoc Report.
- Choose all voucher funded assistance.
- Select actions 1-5 and 7.
- Select all fields on both pages of the Ad Hoc Report.
- Export to Excel.
- Save the file in .xls or .xlsx format.



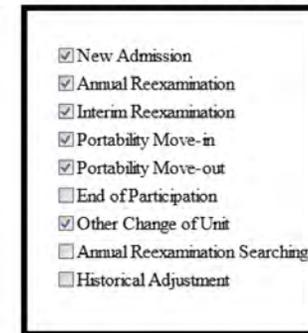
Payment Standard Tool Step-by-Step

Creating the proper PIC Ad-Hoc Report.

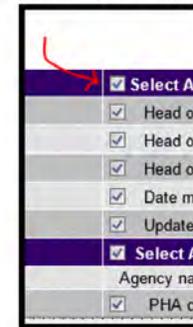
- 1) Log into WASS, then access the PIC system.
- 2) Select the PIC Ad-Hoc Report.



- 3) Select the appropriate PHA and choose "All Voucher Funded Assistance."
- 4) Select Action 1-5 and 7 (see below). The default dates are fine and can be left as they are.



- 5) Then, the user should select "All Fields" in all sections, on both pages.



- 6) Finally, the user should export the report to Excel, being sure to have the file format as Excel (e.g. .xls or .xlsx). One can confirm all fields were selected if the last column with data is KY.
- 7) Save to the desktop (or wherever strikes you), then close the file.

For PHAs with more than 10,000 families: combine each PHC Ad-Hoc file by adding the families at the bottom, so you have one file with one header and all the families listed below.

Payment Standard Analysis Tool Continued

- Next, go to the [HCV UTILIZATION TOOLS](#) page.
- Scroll down and select Tool of Tools (ToT).
- Wait for the Excel file to download, and then open the file.
- When the file opens, it provides a prompt for instructions.
- Select the Payment Standard Tool and click **I'm so excited!**

Color me outside the basic range!

What, in the name of vouchers, is this?! Instructions?

Yes

No

Report Selection

Please select which report(s) you'd like to generate.

Program Overview (PDF)

Drill-Down (PIC Family QC)

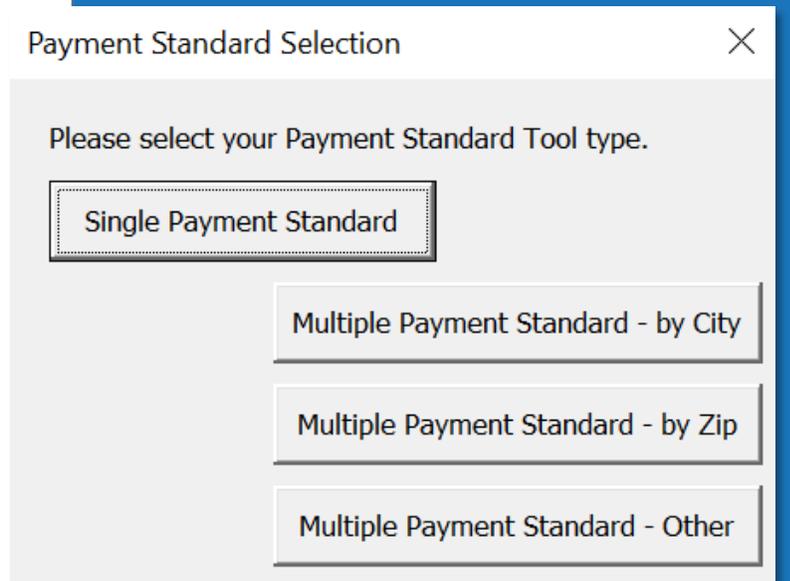
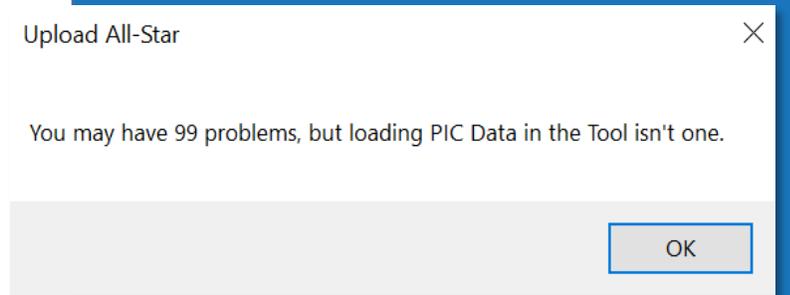
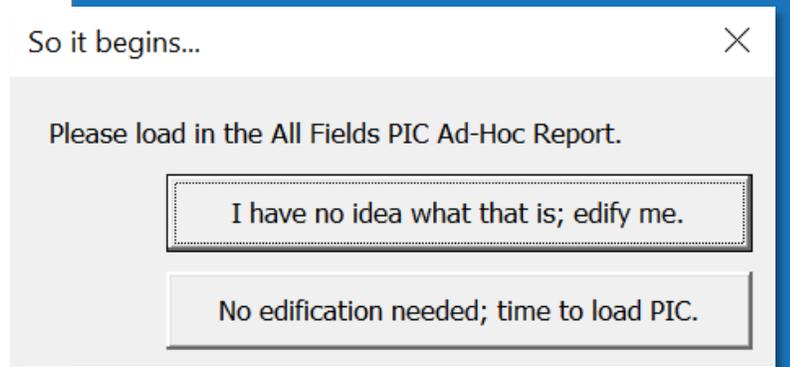
Payment Standard Tool

I'm so excited!



Payment Standard Analysis Tool Continued

- Select **No edification needed; time to load PIC** if you have already downloaded your PIC data.
- Upload the **PIC Ad Hoc Report**.
- If the PIC data is saved correctly in an acceptable Excel-type file, a success window appears. Click **OK**.
- The next pop-up window prompts you to select the tool type that applies to your PHA.



Voucher Size	Efficiency	1 Bedroom	2 Bedroom	3 Bedroom	4 Bedroom	5 Bedroom	6 Bedroom	7 Bedroom	8 Bedroom	9 Bedroom	10 Bedroom
Current											
Select County	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Payment Standard											
As % of FMR											
2022 - Year 1											
FMR	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Payment Standard											
As % of FMR											
2023 - Year 2											
FMR	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Payment Standard											
As % of FMR											

	Date of PS Change	
	Date	Annualized Rent
	Date	Annualized UA
	Date	Annualized Income

Quick How-To	1. Load PIC Data.
	2. Select Current, Year 1, and Year 2 FMRs and PSs.
	3. Input PS Change Date/annual rent/utility change.



Payment Standard Analysis Tool

Payment Standard Analysis Tool Continued

- Select your **county** from the dropdown.
- Enter the **current FMR** and your **current payment standards**.
- Enter the **2022 FMR** (which is likely the same as your current) and then enter the payment standards at a higher percentage than you are currently using.
- Then, enter a **date** in which you would change the payment standard.

Date of PS Change	
Date	Annualized Rent
Date	Annualized UA
Date	Annualized Income



	Date of PS Change	4/1/2022	Quick How-To	1. Load PIC Data.
	Date	Annualized Rent		2. Select Current, Year 1, and Year 2 FMRs and PSs.
	Date	Annualized UA		3. Input PS Change Date/annual rent/utility change.
	Date	Annualized Income		

If red, HUD has the regulatory ability to require an increase in payment standards.		Percent >31% rent burden:	25.2%	Percent >31% rent burden:	7.1%	Percent >31% rent burden:	4.4%	Percent >30% rent burden:	4.4%
Voucher Bedroom Size	Regular Total (9 PBVs)	~Current Rent Burden		CYE 2022 - Year 1		CYE 2023 - Year 2		CYE 2024 - Year 3	
		% >= 41%	% >= 31%	% >= 41%	% >= 31%	% >= 41%	% >= 31%	% >= 41%	% >= 31%
Efficiency	0								
1 Bedroom	101	6.9%	20.8%	3.0%	5.0%	2.0%	2.0%	2.0%	2.0%
2 Bedroom	78	11.5%	26.9%	7.7%	11.5%	6.4%	6.4%	6.4%	6.4%
3 Bedroom	45	13.3%	33.3%	0.0%	4.4%	2.2%	6.7%	2.2%	6.7%
4 Bedroom	2	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5 Bedroom	0								
6 Bedroom	0								
7 Bedroom	0								
8 Bedroom	0								
9 Bedroom	0								
10 Bedroom	0								

Roll-Up Summary				
Category	Current	CYE - Year 1	CYE - Year 2	CYE - Year 3
Monthly HAP	\$85,445	\$88,204	\$88,403	\$88,403
	End of Year Change from Prior	\$2,759	\$199	\$0
	End of Year Change (%)	3.2%	0.2%	0.0%

Overall, by the end of 2023, your PUC will increase by \$12.59, or about 3.5%.			
Program-Wide PUC Change from Current			
	2022	2023	2024
January	\$0.00	\$0.48	\$0.00
February	\$0.00	(\$0.05)	\$0.00
March	\$0.00	\$0.00	\$0.00
April	\$0.00	\$0.42	\$0.00
May	\$0.72	\$0.00	\$0.00
June	\$2.16	\$0.00	\$0.00
July	\$2.28	\$0.00	\$0.00
August	\$0.35	\$0.00	\$0.00
September	\$1.68	\$0.00	\$0.00
October	\$2.39	\$0.00	\$0.00
November	\$1.26	\$0.00	\$0.00
December	\$0.90	\$0.00	\$0.00
PUC Change Type	Program-Wide		



Payment Standard Analysis Tool

Percent >30% rent burden:	4.4%
CYE 2024 - Year 3	
% >= 41	% >= 31
2.0%	2.0%
6.4%	6.4%
2.2%	6.7%

Using this information, PHAs determine projected PUC changes.

CYE - Year 3
\$88,403
\$0
0.0%

Overall, by the end of 2023, your PUC will increase by \$12.59, or about 3.5%.

Program-Wide PUC Change from Current

	2022	2023	2024
January	\$0.00	\$0.48	\$0.00
February	\$0.00	(\$0.05)	\$0.00
March	\$0.00	\$0.00	\$0.00
April	\$0.00	\$0.42	\$0.00
May	\$0.72	\$0.00	\$0.00
June	\$2.16	\$0.00	\$0.00
July	\$2.28	\$0.00	\$0.00
August	\$0.35	\$0.00	\$0.00
September	\$1.68	\$0.00	\$0.00
October	\$2.39	\$0.00	\$0.00
November	\$1.26	\$0.00	\$0.00
December	\$0.90	\$0.00	\$0.00

PUC Change Type	Program-Wide
-----------------	--------------



Payment Standard Analysis Tool

Date of PS Change:		4/1/2022
	Rent	5.0%
	Utility Allowance	10.0%
	Tenant Income	3.0%

Rent Burden:
Area-Bdrm Size

PST

If red, HUD has the regulatory ability to require an increase in payment standards.		Percent >31% rent burden:	43.6%	Percent >31% rent burden:	30.6%	Percent >31% rent burden:	29.8%	Percent >30% rent burden:	29.8%
Voucher Bedroom Size	Regular Total (107 PBVs)	~Current Rent Burden		CYE 2022 - Year 1		CYE 2023 - Year 2		CYE 2024 - Year 3	
		% >= 41%	% >= 31%	% >= 41%	% >= 31%	% >= 41%	% >= 31%	% >= 41%	% >= 31%
Efficiency	0								
1 Bedroom	134	6.7%	39.6%	3.7%	26.1%	6.7%	29.1%	6.7%	29.1%
2 Bedroom	198	12.1%	51.0%	8.1%	35.9%	9.6%	33.8%	9.6%	33.8%
3 Bedroom	128	10.9%	36.7%	7.8%	28.1%	7.0%	22.7%	7.0%	22.7%
4 Bedroom	10	0.0%	40.0%	0.0%	20.0%	20.0%	50.0%	20.0%	50.0%
5 Bedroom	0								
6 Bedroom	0								
7 Bedroom	0								

Overall, by the end of 2023, your PUC will i \$52.68, or about 8.9%.		
Non-PBV PUC Change from Curre		
	2022	2023
January	\$0.00	\$5.66
February	\$0.00	\$4.63
March	\$0.00	\$6.70
April	\$0.00	\$0.00
May	\$0.00	\$0.00



Payment Standard Analysis Tool

Best Practice: Payment Standards

This data should be used in conjunction with the Two-Year Tool to determine the impact of increased payment standards.

Payment standards should be reviewed annually; therefore, the Payment Standard Tool should be used at least annually when the new FMRs come out to determine the impact on your program.

2021	UMAs	Actual UMLs	Actual HAP	Vouchers Issued/Projected To Be Issued	Summary Outcomes					PUC: Actual/Projected	Manual PUC Override																		
Jan-21	4,953	4,438	\$2,046,684	50	<div style="border: 1px solid gray; padding: 5px;"> <p>Year-End Outcomes</p> <table border="1" style="width: 100%; text-align: center;"> <thead> <tr> <th></th> <th>2021</th> <th>2022</th> </tr> </thead> <tbody> <tr> <td>UML % of ACC (UMA)</td> <td>90.7%</td> <td>94.7%</td> </tr> <tr> <td>HAP Exp as % All Funds</td> <td>85.0%</td> <td>89.5%</td> </tr> <tr> <td>HAP Exp as % of Elig.</td> <td>96.1%</td> <td>101.6%</td> </tr> <tr> <td>Proj. 12/31 Total Reserves</td> <td>\$4,369,271</td> <td>\$3,256,713</td> </tr> <tr> <td>HAP Reserves - % ABA</td> <td style="background-color: red; color: white;">17.5%</td> <td style="background-color: red; color: white;">12.3%</td> </tr> </tbody> </table> </div>						2021	2022	UML % of ACC (UMA)	90.7%	94.7%	HAP Exp as % All Funds	85.0%	89.5%	HAP Exp as % of Elig.	96.1%	101.6%	Proj. 12/31 Total Reserves	\$4,369,271	\$3,256,713	HAP Reserves - % ABA	17.5%	12.3%	\$461	
	2021	2022																											
UML % of ACC (UMA)	90.7%	94.7%																											
HAP Exp as % All Funds	85.0%	89.5%																											
HAP Exp as % of Elig.	96.1%	101.6%																											
Proj. 12/31 Total Reserves	\$4,369,271	\$3,256,713																											
HAP Reserves - % ABA	17.5%	12.3%																											
Feb-21	4,953	4,450	\$2,097,959	74						\$471																			
Mar-21	4,953	4,496	\$2,122,920	44						\$472																			
Apr-21	4,953	4,520	\$2,103,087	12						\$465																			
May-21	4,953	4,533	\$2,018,576	19						\$445																			
Jun-21	4,953	4,536	\$2,096,701	39						\$462																			
Jul-21	4,953	4,534	\$2,060,663	12						\$454																			
Aug-21	4,953	4,523	\$2,035,749	129	\$450																								
Sep-21	4,953	4,487	\$2,072,301	124	\$462																								
Oct-21	4,953	4,473	\$2,024,176	100	\$453																								
Nov-21	4,953	4,462	\$1,975,480	140	\$443																								
Dec-21	4,953	4,475	\$2,024,200	70	\$452																								
Total	59,436	53,927	\$24,678,496	813					\$458																				
2022																													
Jan-22	4,953	4,489	\$2,080,490	80			4,489	\$2,080,490	\$463																				
Feb-22	4,953			75	11	70	-28.9	4,541	\$2,125,042	\$468	\$468																		
Mar-22	4,953			75	11	54	-29.3	4,577	\$2,164,785	\$473	\$473																		
Apr-22	4,953			75	11	54	-29.5	4,612	\$2,204,443	\$478	\$478																		
May-22	4,953			75	11	53	-29.7	4,646	\$2,243,836	\$483	\$483																		
Jun-22	4,953			75	11	53	-29.9	4,679	\$2,283,392	\$488	\$488																		
Jul-22	4,953			75	11	53	-30.2	4,712	\$2,323,176	\$493	\$493																		
Aug-22	4,953			75	11	53	-30.4	4,745	\$2,363,186	\$498	\$498																		
Sep-22	4,953			75	11	53	-30.6	4,778	\$2,403,419	\$503	\$503																		
Oct-22	4,953			75	11	53	-30.8	4,811	\$2,443,873	\$508	\$508																		
Nov-22	4,953			75	11	53	-31.0	4,843	\$2,484,546	\$513	\$513																		
Dec-22	4,953			75	11	53	-31.2	4,875	\$2,525,434	\$518	\$518																		
Total	59,436	4,489	\$2,080,490	905	120	598	-331.5	56,308	\$27,645,623	\$491																			



Determine Sufficient HAP Reserves

Is This Right for My PHA?

Determine if your rent reasonableness supports rental amounts that exceed your payment standard.

- Rent reasonableness methodology allows you to set the rent.
- Review your rent reasonableness methodology and comparable units that you are using that are reflective of the current market and compliant with your Administrative Plan.

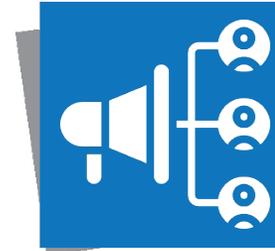


Is This Right for My PHA?

If your PHA success rate is very low, then consider this as an option. Caveats:



Review **rent reasonableness** to make sure your comparable units **support current market conditions**.



Make an increase to payment standards **public knowledge** to increase landlord participation.



Is This Right for My PHA?

If your PHA is in a shared jurisdiction:*

- Make sure your payment standard is not lower than the other PHAs.
- In general, make sure your rents are competitive with the market.

*Voucher holders from multiple PHAs can lease units in participating jurisdictions

Payment Standard Decrease

Payment standards may decrease at the end of the wavier. Follow your PHA's administrative plan to determine how to approach and manage this decrease.

Per [PIH 2018-01](#), 3 options could be in your administrative plan:

- 1 Hold Harmless** (no reduction in subsidy as long as the family continues to receive the voucher assistance in that unit)
- 2 Gradual Reduction in Subsidy** (phasing the payment standard reduction to calculate the family's subsidy)
- 3 Implement Payment Standard Reduction** (use the lower payment standard at the effective date of the second annual re-examination following decrease)

Is This Right for My PHA?

Questions to ask:



Does the PHA have the reserve?



Will it make a difference for the family?



Will it move the needle?



Management Plans



Management Plans

Next steps to analyze your PHA's utilization and policies include:

1. Talk to your Field Office about your program's utilization.
2. Monitor the areas of your program that impact your utilization:
 1. Success Rate
 2. Attrition Rate
 3. Voucher Issuance to HAP
Contract Rate
 4. Payment Standards
 5. Utility Allowance
 6. Waiting List
 7. Portability
 8. Conversion Activities
 9. Project-Based Vouchers
 10. Policies

Management Plans: Success Rate

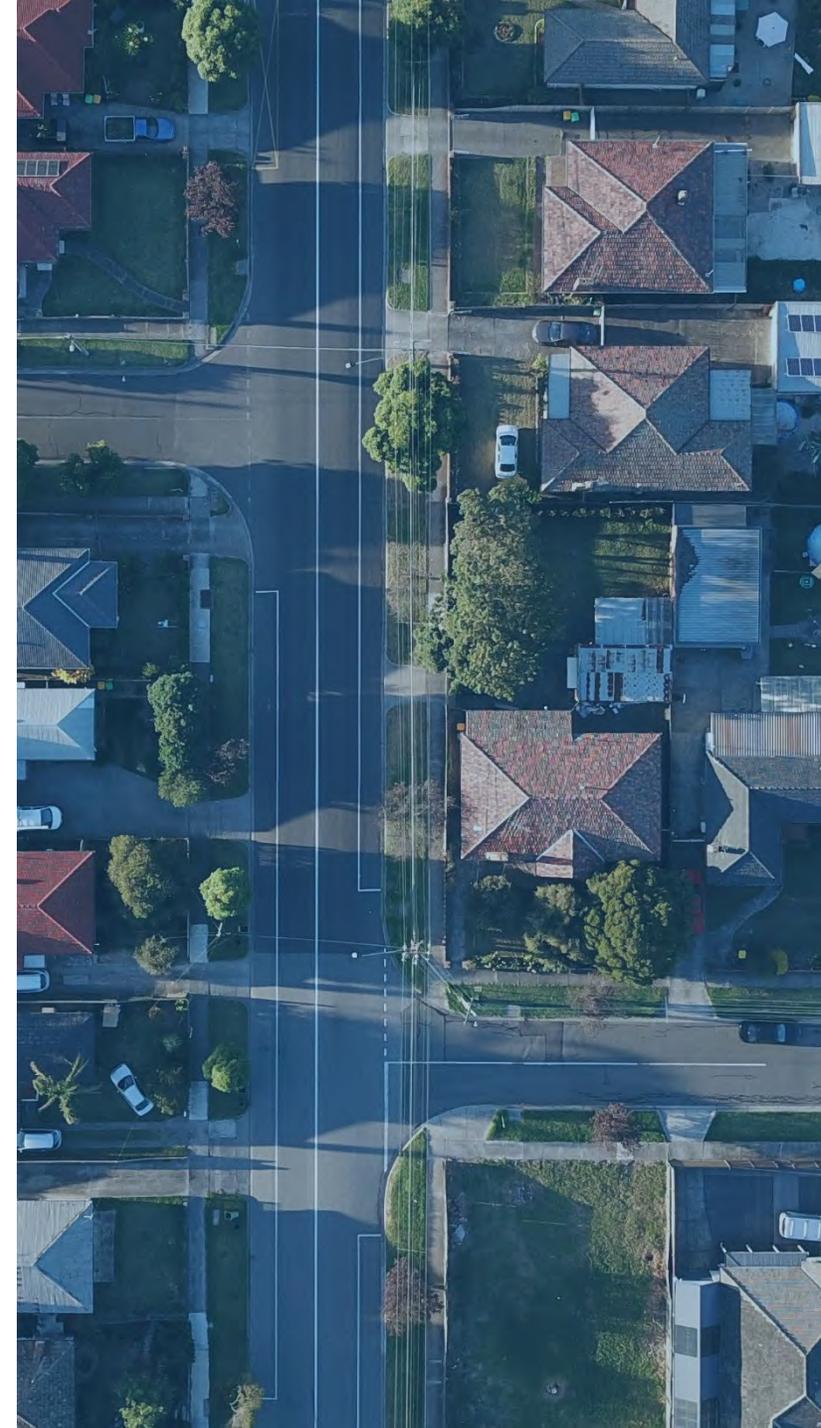
Do you track the success rate?

1. Use your system of record.
2. Use the HUD Two-Year Tool and Success Rate Tracking tab.
3. Update success rate tracking in the Two-Year Tool.

To impact the success rate:

1. Examine how you conduct landlord outreach.
2. How do you coach residents to approach landlords?
3. Review [PIH Notice 2022-18](#).

Reminder: Maximizing the success rate minimizes the administrative burden of the PHA.



A nighttime photograph of a modern, multi-story building complex with a curved facade, illuminated from within. In the foreground, a large white yacht is docked at a marina. The scene is reflected in the water.

Management Plans: Attrition Rate

Do you track your attrition rate?

Use an average attrition rate, so it isn't changing monthly.

https://www.hud.gov/program_offices/public_indian_housing/programs/hcv/dashboard





Management Plans: Voucher Issuance to HAP Contract Rate

Do you track your lease up rate (voucher issuance to HAP execution)?

1. Use your system of record.
2. Use the HUD Two-Year Tool Success Rate Tracking tab.
3. Update success rate tracking in the Two-Year Tool.

This will determine how long it will take to get issued vouchers leased up.



Management Plans: Payment Standards

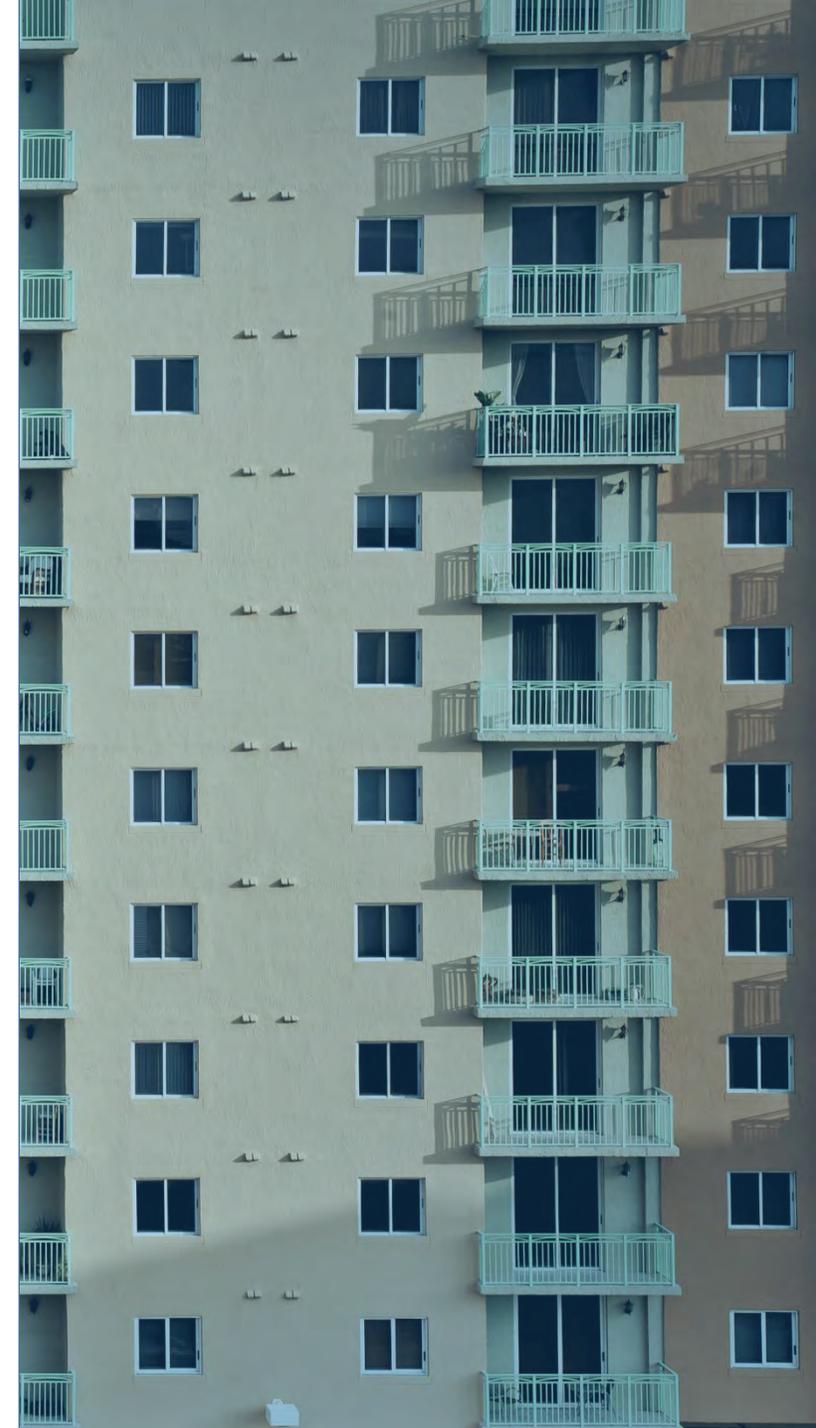
Do you understand how this impacts the families on your program?

1. Utilize the Tool of Tools (Payment Standard Analysis) to determine the impact payment standard changes have on your PUC.
 - Update the Two-Year Tool with a manual override of the PUC.
2. This will also inform the PHA what percentage of families on the program are rent burdened.
3. Review PIH Notice 2018-01 to determine what happens when the PHA has a decrease in the payment standard and adopts a policy.

Management Plans: Utility Allowances

Do you understand how this impacts the families on your program?

1. Utilize the Tool of Tools (Payment Standard Analysis) to determine the impact utility allowance changes have on your PUC.
2. Update the Two-Year Tool with a manual override of the PUC.



Management Plans: Waiting List

Do you understand how successful applicants are from application to voucher issuance?

1. Use your system of record.
2. Use the HUD Two-Year Tool Success Rate Tracking tab.
 - The more successful applicants are, the less administratively burdensome it becomes.
 - Also, use this analysis to determine when a PHA will need to reopen its waiting list and how many applications it will need to take.



Management Plans: Portability



Should my PHA be administering or absorbing?

1. How many vouchers am I losing from port-outs?
2. How much HAP do port-outs cost the PHA?
 - Did I apply for set-aside funding?
3. Should my PHA absorb or administer ports?
4. What impact does that have on my utilization?



Management Plans: Conversion Activities

When are conversion activities anticipated to take place for my PHA?

1. What type of conversion is taking place?
2. How will this impact my HAP and voucher utilization?
3. Are all necessary departments aware of what is taking place?
4. Do we have the needed capacity and resources to have a successful conversion?
5. Are we applying OCAFs (operating cost adjustment factors) to RAD contracts at the annual anniversary date?

Management Plans: Project-Based Vouchers

Do we have any upcoming PBV units coming online?

1. Do we have the vouchers and HAP funds available?
2. Did we apply for set-aside for units under an AHAP?
3. Do we need to hold back the issuance of vouchers to cover new PBV units?
4. Are project-based vouchers something the PHA should be considering?



Management Plans: Policies

Success rate: Do we have policies that restrict successful lease up?

1. Do we have policies above and beyond HQS (Housing Quality Standards)?
2. What is our policy on voucher extensions?

Attrition rate: Do we have policies that are too strict?

1. What is our policy on how long a resident must provide required documentation?
2. What is our policy on missed HQS inspections?

Management Plans: Policies

Payment standards: Are my payment standards too high or too low?

Utility allowances: Do we apply updated utility allowances annually because that's what we've always done?

1. Should we change the utility allowance?

Waiting list: What are our preferences?

1. Should we update our preferences?
2. How do our preferences interface with conversions and community priorities?

Management Plans: Policies

Conversions: RAD requires its own set of policies in the Administrative Plan; what should we select?

1. Phase in period for rent increases—3- or 5-year phase in periods?
2. Do we have a chapter in the administrative plan?

PBV: Requires its own set of policies in the administrative plan; do we have one, and what does it say?



Next Steps

1. Analyze your data.
 - System of record data
 - Two-Year Tool
 - Tool of Tools
2. Discuss with your field office.
3. Complete a management plan.
4. Make decisions on how to maximize utilization.
5. Implement the plan.
6. Help families in your community secure affordable housing.



Thank You

See HUD Exchange for additional documents and resources.