
**An Analysis of the Housing Authority of Portland's Project
Based Section 8 Assistance Program's Utilization Barriers and
Owners' Perceptions of its Strengths and Weaknesses**

**Conducted by:
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and
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Purpose of report and scope of study

The Housing Authority of Portland (HAP) views the use of Project Based Section 8 Assistance Program (PBA) as an important strategy to meet the needs of the very low income and homeless populations in Portland and Multnomah County. Allocation of PBA to non-profit sponsored projects is a key ingredient to further HAP's support of the 10 Year Plan to End Homelessness. As a partner in the 10 Year Plan, HAP has made PBA vouchers available to increase the likelihood of success for those households that may need permanent rent subsidies linked to service provisions in existing and new affordable housing projects. The project-based vouchers are a component of HAP's housing choice voucher program.

At the time of this evaluation, there were over 1,100 units of housing supported by PBA vouchers spread across nearly 75 properties. HAP has entered into Memoranda of Understanding [MOUs] with the property owners to use these vouchers for housing units serving specific very low-income populations. The MOUs identified income restrictions of between 0 to 50 percent of median family income [MFI]. In some cases, HAP indicated a preference for the sponsor to house special needs populations with extremely low-income households earning between 0 and 30 percent MFI.

The Housing Authority of Portland (HAP) contracted with the Housing Development Center (HDC) and Technical Assistance for Community Services (TACS) to conduct an evaluation of the Project Based Section 8 Assistance program [PBA]. Utilization of PBA units was 87% in 2008. Each PBA voucher is an extremely valuable community resource, and HAP's goal is to maintain 95% utilization.

The assessment included two elements:

1. **An analysis of utilization**, focusing on buildings where utilization is low or the process of filling vacancies is lengthy. HDC and TACS [referred to as the Consulting Team] conducted site visits to some buildings to review waitlists, lease-up procedures, client files, and service agreements to identify reasons for utilization problems. The team looked at:
 - Utilization: are all contracted units available for leasing and filled
 - Vacancy Rate: how long does it take to fill a vacant unit and why
 - Turnover Rate: average length of tenancy and how this might relate to services
 - Length of time from HAP approval of tenant to owner's submission of final documents to HAP (PBA confirmation letter and copy of lease)
2. **An assessment of the strengths and weaknesses of the program overall.** To gather information on the overall program the Consulting Team and HAP staff

designed a survey that was sent to all owners and some service agencies, asking for perceptions of what is working well, what changes are needed, and HAP's performance. In addition to the survey, the consulting team interviewed a sample of owners.

The survey and interview questions inquired about the owners' perceptions of the strengths and weaknesses of the PBA program, as well as the owners' understanding of:

- The time required to fill vacant units;
- Whether residents were getting the services they needed;
- What administrative processes were working or not working;
- What impacts, if any, the provisions of the MOUs had on processes/success in utilization; and
- Owner perceptions of HAP policies/processes.

HAP encouraged owners to be as candid as possible in providing feedback on how HAP has been performing as a partner.

Methodology

Determining Performance

To determine which projects were performing at a lower than optimal level, HAP reviewed existing physical occupancy data of households that moved in and out of the PBA units from October 1, 2007 to September 30, 2008. This data came in two forms: 1) the point in time utilization of the PBAs at Oct. 1, 2007 and Sept. 30, 2009 and 2) monthly trends of move ins and move outs over the course of the year. HAP identified eleven projects that had lower than 90 percent physical occupancy at one of the points in time and/or appeared to have more move outs than move ins through the year. These owners and projects were:

- Central City Concern: 8 NW 8th (now the Richard L. Harris Building), Hotel Alder, and Interstate Crossing
- Cascadia Behavioral Healthcare: Mainstream Scattered Site, Clinton Ridge, Midland Commons, Emerson Court, and West Gresham
- Human Solutions: Greentree
- HAP: Kafoury Commons
- Portland Community Reinvestment Initiatives (PCRI): Albina CDC Scattered Site

The methodology to analyze the reasons for under utilization included qualitative and quantitative primary data collection and an analysis of existing data compiled by HAP.

Document Review

HDC and TACS reviewed many property level documents, including:

- Copy of lease of a PBA tenant and addendums
- Monthly rent rolls for past 6 months
- Screening criteria for general population and PBA population
- Housing plan for PBA
- Service provider contractual agreement/policies and protocol
- Tenant files
- Waiting list(s) with date from last update

Property Manager Interviews

In addition to this document related review, HDC and TACS asked each of the property managers a series of questions related to the many components of their intake processes, such as outreach methods, social service referrals, the application process, managing the waitlist, screening criteria, appeals, HAP's intake and inspections approval processes, getting the unit ready, lease provisions, and property and asset management staffing. After each interview, the consulting team summarized the conversation and allowed the property managers to edit the interview notes to ensure accurate representation of the conversation.

HAP Staff Interviews

HDC interviewed a sampling of HAP case managers and an inspection scheduler to learn more about the steps of the intake process that involved HAP. Again, these notes were reviewed by the interviewees to ensure accurate representation of the conversation.

Tenant File Reviews

The consulting team reviewed tenant files at the property to determine if the property managers were in compliance with the target population identified in the HAP PBA contract. In addition, we reviewed consistency across the HAP and property managers' files to identify any gaps in data gathering and storage. This cross-referencing was particularly important because there was little consistency within the files kept at each property in terms of the type of data and the dates to verify the length of time to complete each intake step. Both files were needed to tell the intake story from when someone requests to be on a waitlist to when they move into a home. For example, HAP's files were needed to verify the HAP intake and inspection approval dates, whereas the property managers' files generally informed when the applicants requested to be on the waitlist and when they reached the top of waitlist.

Owner Survey

To broaden the input on the PBA Program, a survey was sent to 55 individuals identified by HAP staff as being property managers, case managers, building owners and other social service agency representatives working directly with PBA housing projects and tenants. The survey was designed by the HAP staff and the consulting team and administered through Survey Monkey. From the initial 55 surveys sent, 48 were received [seven were returned with a hard bounce indicating an invalid or outdated

email address]. Of the 48 received, thirty-four recipients opened and responded to the survey. Of the 34 responders 23 [67.6%] completed all or almost all of the survey questions.

The respondents represent a cross section of key agents working within the PBA Program: 47.1% are building managers, 11% are case managers, 5.9% are building owners, and the remaining 35.5% represent persons who have combined roles [case and building manager], are assistant managers and asset managers. They are involved both large and small numbers of PBA units.

Findings and Recommendations – Overall Program

A. Utilization Goal

There is not a clear policy statement from HAP in the Memorandum of Understanding [MOU] with each project sponsor that there is an expectation of 95% utilization for the PBA program. In addition, the PBA MOUs do not provide guidelines or definitions on how the sponsors will be evaluated on their utilization performance. In order to achieve HAP's goal of 95% utilization, HAP and the project owners need to establish a common understanding regarding reasonable utilization goals and methods to best manage the information to improve performance.

Recommendation: HAP should revise the format of its MOU to clarify its priority for maintaining utilization. The goal for 95% utilization should be clearly communicated, and there should be a discussion with owners about how this can be tracked and monitored most efficiently. HAP could assist by setting in place the tools for tracking and monitoring through quarterly sharing of reports from HAP's database.

B. Indicators of Performance

In identifying projects to be reviewed for this evaluation, HAP used two different measures to identify utilization performance: a point-in-time evaluation of utilization and a count of move-ins and move-outs since the beginning of the year.

The consulting team summarized this data in **Appendix 2**. This table tracks the number of units vacant at the start of the year, the monthly move ins and monthly move outs, and the outstanding number of vouchers at the end of the year. This analysis was completed for the 41 properties with PBA vouchers that reported in 2007-08. Data from Appendix 2 are summarized in Table 1 on the next page. It appears that a majority of the properties in operation [54 percent] is sometimes taking between 30 and 60 days to re-occupy units and a third took more than 60 days. Fully 20% had discrepancies in the number of PBA vouchers assigned to their properties.

Table 1 – Status of PBA Properties

Summary of Projects Reporting from 2007-2008	#	% of total reporting (41)	% total minus lease up and rehab (35)
Properties in lease up	5	12%	
Properties under rehab	1	2%	
Properties taking longer than 30 days to fill vacancies	19	46%	54%
Properties taking longer than 60 days to fill vacancies	13	32%	37%
Properties with potential over leasing and/or record keeping discrepancies	8	20%	
Total number of properties/contracts reported	41	100%	

HAP looks at the active contracts at the beginning of each month, and actual utilization is reflected in the monthly payments to each project sponsor. However, as can be seen further in this report, the perception of the rate of utilization by owners is higher than actual utilization. There is not a reported level of utilization that is shared by HAP and the project owners.

Recommendation: HAP should clarify with all project owners how utilization will be measured in the future, and either provide periodic reports to owners, or show them how they can measure their own utilization rate.

C. Owner Perceptions of the PBA Effect on Lease up Timing

All Owners: A written survey was sent to all PBA project owners/managers. Survey respondents were asked to give their estimate of the time required for them to complete certain steps in the application process, and for HAP to complete their review/approval and inspection processes. The following are the survey respondent' **estimates** of the times for specific key processes:

- Time from request to HAP until completed intake appointment:
 - Between 2.33 and 3.24 days on average, based on different case managers
 - A range of 0 to 14 days
- Time from request to HAP until inspection was scheduled and completed
 - 5.68 days average
 - A range of 0 to 15 days

- Owner’s time between tenant move out and new tenant move in
 - 0 to 14 days - 7 respondents [36.8%]
 - 15 to 30 days - 9 respondents [40.9%]
 - 31 to 45 days - 3 respondents [13.6%]
 - No respondent indicated taking longer than 60 days

Select HAP Staff and Owners Involved in Evaluation: Follow up interviews with three HAP staff and the five project owners/managers with non-performing properties indicated general agreement on the time required to complete the PBA client intake and physical inspection steps as outlined in Table 2. Note that the intake and inspection processes can be completed concurrently. These separate tracks may involve different staff at the owner/manager level and involve two separate teams at HAP.

Table 2 - Owner/Manager of Non-Performing Properties’ Perceptions of Time for Intake and Inspection

Client intake process:	In business days/hours
1. Submission to HAP for background check OJIN	24 hours
2. HAP to conduct background check (OJIN) (CCC specific input on OJIN was 4 – 5 days)	1 - 3 days
3. HAP intake interview and approval	3 - 10 days
Total additional days for client intake	5 – 14 + days
Inspection Process (on a separate track than intake):	
1. Inspection scheduled	2 - 5 days
2. Inspection(s) completed until passed (CCC specific input on inspections was 1 – 4 weeks)	7 - 10 days
Total additional days for inspection process	9 – 15 days

There are several conditions that would extend the turnover time of PBAs:

1. special needs populations requiring more time to get through the application paperwork and processing;
2. significant number of initial denials and appeals;
3. extraordinary damage extending the make ready time; and
4. applicants who require time and assistance to secure funds to pay for deposits.

Even with perfect alignment between the client intake and inspection processes, the owners of the nonperforming properties indicated that it could take between nine and fifteen business days, or two to three weeks, longer to re-lease than non-subsidized units. In addition, the average number of turnovers per year will also affect the overall utilization rate.

Recommendation: HAP should set utilization goals that reflect turnover rates needed to complete PBA specific processes in addition to project specific goals based on unit and population type.

D. Record Keeping at the Sponsor Level and at HAP

An initial component of our assessment was to gather information on the property managers’ understanding of the PBA program, guidelines, and their housing plans. Of the eleven projects in this evaluation, five of the property managers were misinformed regarding the number of total PBAs at their properties (see Table 2). One untracked voucher can significantly skew the utilization and occupancy rates, particularly over time and considering the small number of vouchers per property. When comparing the number of active participants to the number of believed vouchers, some of the project sponsors had a different perception of the property’s performance than HAP’s.

When asked about utilization of their PBA units, 52% of the survey respondents indicated that their PBA units were fully leased 100% of the time. Forty-three percent said their units were fully leased between 90% and 99% of the time. Only one respondent indicated that their PBA were fully leased up less than 90% of the time [between 80-89%].

During the owner/manager interviews, the consulting team reviewed the number of vouchers for each project, whether the vouchers were for floating or fixed units, and which specific units were included in the Memoranda of Understanding. Table 3 below compares voucher numbers from the MOUs, HAP’s records, and current owner listings. Where there are differences between the HAP and owner records, the consulting team suspects that these differences in records may have occurred during staff changes.

Table 3: Comparison of Voucher Numbers

Project Name	Owner	Number Vouchers in Contract	# Vouchers Believed by Property Manager	# of Active PBA Participants per HAP at time of interview	# of Active Participants Per PM at time of interview
Mainstream*	Cascadia	76	76	41	39
Midland Commons	Cascadia	22	22	22	20
Green Tree	Human Solutions	4	4	4	4
Hotel Alder**	CCC	35	33	31	31
Kafoury Commons	HAP (managed by Bowen)	11	11	6	6
Clinton Ridge*	Cascadia	8	10	9	10*
Interstate Crossing**	CCC	11	10	10	10
Emerson	Cascadia	4	4	4	4
West Gresham	Cascadia	26	26	25	25
8 NW 8 th **	CCC	57	56	50	54
PCRI – Scattered Site	PCRI Infinity Management	20	19	18	18

*HAP and Cascadia are in the process of reconciling the differences in voucher numbers.

**Central City Concern is also reconciling these numbers within its information management systems and with HAP.

Recommendation: During its training for project sponsors, HAP should review best practices on how to maintain good tracking of vouchers and how to reconcile differences from HAP's monthly contract payments.

E. The Program Is Serving its Target Population

One element of this study was to verify that the intended target population was being served with these resources. The consulting team found that each project reviewed was indeed serving the intended target population. In addition, it appears that a majority of the individuals and families receiving housing under the PBA program had multiple problems and barriers to housing. According to the survey results, PBA tenants were more likely to be formerly homeless, formerly chronically homeless, and challenged via screening than the non-PBA tenants within the same building.

With the focus that some sponsors place on housing persons experiencing homelessness or at risk of homelessness, the PBA program is being used to provide housing to people who might not be successful renters in the private market. Both the screening criteria and the program design encouraging support services for tenants are critical to serving this population with multiple housing barriers. Part of the interviews, file reviews, and the survey were directed at looking at who is being served by PBAs and how the housing barriers that tenant face have impacts on screening and application processing.

Individuals interviewed and those responding to the survey do see that the PBA model as successful. Overall, they report longer tenancy of households and a greater ability to pay rent on time in PBA units than in their other affordable housing units. It is likely that the certainty of the housing and the supportive approach of the building owners contribute to these results.

Although the consulting team did not provide empirical evidence that renters are more likely to be successful in a PBA unit than the open market, our observations indicate that the program is advancing a policy objective of housing homeless persons or persons at risk of homelessness with multiple barriers to achieving and maintaining housing. In addition, the program appears to support more stable communities and healthier projects for both the managers and owners.

F. Sponsors did not Feel that the Nature of the Population Affected their Ability to Keep Units Full

Survey respondents were asked: “Does the nature of the population you are serving in your PBA units impact your ability to keep the units fully utilized?” While it was apparent that the target population did have multiple barriers to housing, **91.3% of the respondents did not feel that the nature of the population affected utilization** once the tenants were housed.

When asked about challenges, the survey respondents did mention difficulties in completing paperwork, getting potential applicants through the screening criteria, particularly the criminal checks, and maintaining contact with them.

The key to the PBA program’s success is getting the target populations through the intake process and then providing sufficient supports to increase the likelihood of longer tenancies.

G. Sponsors are Focused on Insuring Tenants’ Eligibility

The MOUs do identify the sponsor’s responsibility to serve the target population, to comply with Section 8 program regulations. It was clear during the owner/manager interviews and in reviewing their tenant files, that priority is placed on insuring tenant eligibility and meeting the requirements of the Section 8 Program. Since the target population is homeless or those at risk of homelessness, there is considerable effort placed on trying to maintain contact with applicants and in updating applicant information in order to insure that all of the requirements of basic eligibility are met.

H. Time Required for Scheduling and Completion of Inspections

Survey respondents and owner/managers who were interviewed indicated that the length of time required to both schedule inspections and complete the inspections was a key factor in the time to re-lease. There was incomplete information to verify the specific time between the request for inspection and the time of the actual inspection. The HUD standard for inspections is to have them completed within 15 or less from the request date.

Recommendation: At the time of this evaluation HAP staff was making some changes in the inspection scheduling processes. The consulting team recommends that as HAP communicates with project sponsors about changes to the inspection request process, that information also be provided on HAP’s expectations for response time on inspections, and who owners/managers should call if there are delays in inspections.

Observations of the PBA Program Based on the Projects Reviewed

Central City Concern (CCC) and Cascadia Behavioral Healthcare, Inc. (Cascadia) were the two owners that had more than one property with lower utilization rates. There were some organizational and management level themes that emerged through this evaluation. These findings were not project specific, and would affect any project managed by the same property manager/owner. Both CCC and Cascadia self-manage their properties, serve an extremely low-income special needs population, and manage elaborate wait list systems for thousands of people. These wait list systems are designed and managed wholly by the providers. HAP does not mandate any policies or procedures in overseeing these wait list systems. These two owners represent 87 percent of the total non-performing vouchers.

CCC and Cascadia have the largest number of PBA vouchers to manage, and both organizations serve tenants with complex issues. Each has developed portions of their processes that work well. For instance, CCC does less initial screening, while Cascadia does considerably more. Cascadia has been experimenting with periodic purges of the waitlist whereas CCC has not. There are benefits and drawbacks to each approach that they have developed. However, working together with HAP may provide insight into more common procedures and waitlist policies among the organizations that may result in reduced processing time. A cost-benefit analysis may benefit these two organizations in determining if and when they close their waitlists and/or create a schedule for periodic purging.

The Target Populations and Lengthy Waiting Periods Create Complexity

The focus on homeless families and individuals is further complicated by additional set-asides or other requirements of the project sponsors. For example, in addition to serving extremely low-income households, CCC and Cascadia serve persons recovering from alcohol and drug addiction and/or have chronic mental health problems. The process of establishing eligibility and maintaining contact with clients during very long waiting periods makes for an overly complicated and very paper intense intake and application process.

CCC, because of its mission, chooses to accept referrals from 12 to 13 agencies with whom they have a co-agreement, but they do not prioritize certain agencies over others on the PBA waiting list. Other units in CCC projects are contracted for by the Community Engagement Program [CEP]. The waitlist is open to anyone, but most of the referrals come from Homeless Alcohol and Drug Intervention Network (HADIN) provider agencies. Everyone who requests to be on the PBA waitlist is approved to be on the list. There are currently between 1,000 and 1,400 individuals on the CCC PBA wait list for both the Alder Hotel and 8 NW 8th.

Both CCC and Cascadia work constantly to maintain active applications for their waitlists. CCC tries to keep between 10 and 20 applicants moving through the intake

process. When a queue drops below five active applications, CCC staff sends batches of letters to the next applicants on the list. They generally send 50 to 100 letters in a batch every couple of months. In general, if 100 letters are sent, 70% do not respond. Fifty percent of the 70% are returned to CCC. Of the 30% who do respond, a third of them do not qualify under Alcohol and Drug Free Community's (ADFC) guidelines. Another third is either denied by HAP's criminal background check or are unable to complete all of the application steps. Overall, about 10% of each batch of 100 letters moves into housing.

Cascadia maintains multiple waiting lists: the Homeless list and lists for each unit size at each project, amounting to 23 waiting lists. Cascadia allows applicants to choose to be on three lists. Most applicants choose the Homeless list and two site-specific lists. Cascadia follows much the same process as CCC, but with 23 lists. There are currently a combined total of 747 applicants on the Homeless waiting lists and the lists for Emerson, Clinton Ridge, Midland Commons and West Gresham. Most of the applicants on the lists date from 2007; however, the top applicant for West Gresham dates from July 2006. Cascadia also requires a longer application to be completed to get on a waiting list, in comparison to CCC and Human Solutions, who have a shorter application form. Cascadia is evaluating whether to shorten their initial application materials.

The complexity described above at CCC and Cascadia is largely due to the specific missions of these two organizations and their commitments to serve homeless persons and persons with chronic mental illness and addictions. These mission-specific complexities coupled with the requirements of the Section 8 Program make it very time consuming to maintain contact with applicants and ensure up to date and accurate applications materials and verifications.

Timing Involved in Handling Denials and Appeals

CCC does not have any screening criteria beyond the ADFC guidelines, which means they have to be clean and sober for at least 90 days and engaged in a verifiable and recognized program of recovery from chemical dependency. CCC ends up denying 20-40% of the PBA applicants [who respond to the intake mail], because they do not meet the ADFC eligibility criteria. There is a brief housing pre-application, but it is not used to determine eligibility. It is used as a self-selection tool for people who may be over income.

As a result of CCC's process, HAP becomes CCC's primary screening mechanism through the Oregon Justice Information Network (OJIN), a criminal background check. For Hotel Alder, OJIN rejects between 60-75 percent. For 8 NW 8th, OJIN rejects between 10-15 percent.

Cascadia does its own OJIN checks, and Cascadia's staff estimate that of the complete applications, about 70% are denied in their internal screening process, due primarily to negative reports from OJIN. About 70% of those appeal, and about 60% of the appeals are successfully approved. Given the number of applications that Cascadia

is managing, this adds further to the volume of activity necessary to get approved applicants.

Differences in HAP Intake Processes and Inspection Processes

Because CCC works with two different HAP case managers, it was evident that there are differing intake interview schedules, processing and expectations. For example, one case manager will schedule three interviews for CCC per week regardless of the number of vacancies or the number of buildings that he/she manages. Another case manager will schedule three interviews every Wednesday per property, which provides more opportunities to approve applicants. HAP may want to explore the case loads of the case managers to see if there are alignment opportunities by sponsor.

While other owners/managers did not identify differences in case manager scheduling, there were issues raised about how inspections were scheduled and results were reported.

CCC has worked out an arrangement whereby HAP has keys to its properties so that someone does not have to be there for each inspection. The unintended consequence of this arrangement is that CCC does not know when a unit has been inspected and approved. CCC felt that HAP has inconsistently left “pink slips” at the properties after the inspection.

Large Numbers of Vouchers and Inconsistency in Tracking

Because CCC and Cascadia own and manage large portfolios of affordable housing units, they also manage large numbers of PBA vouchers. The combination of vouchers tied to specific housing units, floating vouchers, and roll over of vouchers from earlier programs adds further complexity, and has contributed to the lack of consistency between owner records of vouchers and HAP records. The changes over time to the Mainstream PBAs at Cascadia have contributed to confusion over these units. While this study was underway, HAP staff and owner/managers at Cascadia were working to identify the inconsistencies in units.

Perceptions of Time Necessary to Complete Application – Intake – Move In Processes

As part of the owner/manager interviews, the consultants asked the persons interviewed to estimate the time for each step in their application, intake and leasing process. The consultants also reviewed tenant files at the owner/manager locations and at HAP. By and large, the owner perceptions of time necessary for steps in the process were shorter than the average times confirmed by the file reviews. This difference could also be seen in the estimates asked for in the owner/manager survey.

Recommendations for HAP from Surveys and Interviews

Since one of HAP's key goals for this evaluation was to identify the strengths and weaknesses of the program, survey recipients were asked to assess HAP's performance on a number of key transactions, such as scheduling of intake appointments, scheduling of inspections, timeliness of payments, timeliness in notification of inspection results and rent increase requests, communications and training. Overall, the respondent ratings of HAP staff transactions and responsiveness were generally high. The transactions by HAP staff that got the highest positive ratings were:

- Information about tenant status changes
- Scheduling and completing intake appointments with clients
- Communications and procedures for annual inspections
- Availability of assigned case manager to discuss tenant or specific PBA project issues

The transactions or responses that warrant reviews based on the feedback from the survey respondents are: scheduling and conducting of initial inspections, overall communication about PBAs, ease of reaching inspections department, and responses to rent increases. Overall, the survey respondents expressed very strong support for the PBA Program.

When asked for ideas on how to improve the PBA program, respondents included praise for the program as well as for specific HAP staff. The HAP function about which there were the most suggestions for change and improvement was inspections. All of the specific suggestions are included in the Appendix to this report. Here are several of the specific comments about inspections:

- Overall, it [*the PBA program*] works pretty well, although there are delays in caseworker getting notices to vacate to inspections. Perhaps notices could get to both depts. or be received in inspections, who would then forward to caseworker.
- I think there needs to be some improvement with inspections scheduling and more uniformity as to why a unit fails...all inspectors are not consistent.
- I liked the old way of Inspections. Having [case manager] request the inspection worked very well. This leaving a message on the phone is not working well. Not sure why it was changed, because for me, it was working brilliantly!

During the owner interviews, questions were asked about specific recommendations for improvement. Here are specific recommendations from three of the owner organizations: Central City Concern, Cascadia, and Human Solutions.

Central City Concern's Recommendations:

- The more electronic communication, the better, for a record trail. Too many [voicemail] messages seem to go unanswered.
- Consistent methodology and procedures for all of the case managers at HAP when dealing with all of CCC's projects.
- Better tracking will lead to less duplication.
- CCC would like redundant (electronic/email and U.S. mail) notification of status changes if income changes or if the household becomes ineligible for rent subsidy.
- CCC would like notification of the annual inspection schedule.
- CCC would like to receive the inspection form "pink slip" immediately after the inspection, or, at a minimum, email or fax notification that the unit passed/failed.

Cascadia's Recommendations:

Cascadia's staff did mention that they feel they have very good working relationships with their HAP case managers. They feel that they get the support they need. They did mention that they have experienced some changes in sending wait lists to HAP. They used to have to send the Homeless Wait List to HAP but then were told not to. Yet they still send other wait lists. They would like some clarity on the why this changed.

Human Solutions' Recommendations:

Human Solutions finds their working relationship with HAP to be very good. They feel that their case manager follows the rules, is clear, and goes out of her way to make applicants feel welcome. Her response to Human Solutions inquiries is always very timely. The Human Solutions staff has experienced other HAP case managers that are not as welcoming to applicants.

Some of the suggestions they offered for improvements include:

- They work with several HAP programs, and find that having different ways to schedule inspections confusing. It would be helpful to have one consistent method for scheduling inspections.
- It would also be helpful to have more written instructions on what to do when a tenant leaves. With staff turnover or infrequency on some actions, a written guide could be a good tool in staff training and for ensuring consistency in actions.

Appendix 1 – Property Summaries

Central City Concern

1. 8 NW 8th Property Summary

Address: 8 NW 8th, Portland, OR 97204

General Partner: Central City Concern

Property Management Company: Central City Concern

Total number of units in project: 180

Total number of PBAs: 2 SROs, 55 studios

PBA/non-PBA ratio: 32%

Population served: Very low-income individuals (below 50% MFI) who are in recovery from chemical dependency, have a mental illness, or are dually diagnosed.

Findings and Recommendations

Once the number of PBA vouchers and active participants were reconciled with HAP's records, the utilization at 8 NW 8th appeared to have improved. According to CCC's records and analysis of move ins and outs, the average turnover time at 8 NW 8th PBA occupied units has ranged between 24-27 days since 2006. Its physical occupancy rate (count of PBAs occupied days / potential occupied days) has hovered at around 97 percent over the last three years based on CCC's active participant list, which did not correspond with HAP's active participant list. With inconsistent lists of active PBA voucher holders, the consulting team was unable to verify if CCC's occupancy records were accurate.

When we did cross-reference the HAP PBA files with the CCC tenant files (see table below), it appears that the average length of time from HAP's intake approval and inspection to move in was relatively short – 12 to 13 days – which indicates that possible delays to the intake process are prior to HAP's involvement. In addition, 63 percent of the inspections occurred before the HAP intake approval. The inspection was less of a delay to the overall intake process than assumed through the owner/manager interviews.

In general, averaging the length of time between each milestone of the intake process was not reliable for this project. The only consistent pattern in 8 NW 8th was the wildly variable time lines for each applicant. This wide-ranging set of dates indicates that there could be inconsistent systems, staffing levels and expectations, or policies and procedures related to the intake process at CCC property management. It also could be an indication that the population served by CCC is inconsistently providing the required paperwork and security deposits and following deadlines.

The table below represents a sampling of tenant files from both the project sponsors and HAP to assess the average and median number of days it took for the PBA

applicants to complete three key components of the intake process. These steps were: 1) time from when the applicant reached the top of the waiting list to when they had a complete and approved housing application, a form created by the sponsors or property management staff; 2) time from when the housing application was approved by the sponsor to when HAP completed its intake approval process, including OJIN and the intake interview; and 3) time from HAP approval to when the applicant actually moved into housing. The data comes from tenant files either kept by the property management staff or by HAP. The consulting team has provided this data for all of the projects included in this evaluation.

8 NW 8th – Data from HAP and CCC Tenant Files			
Percent Sampled		33% (19/57)	
	Average No. of Days	Median No. of Days	Range [outliers indicate possible data quality issues]
Days from top of waiting list to housing application (from CCC)	181	193	4 to 537
Days from housing application to HAP approval	80	49	1 to 142
Days from HAP intake approval to move in	13	7	1 to 46

Recommendation: Given the number of record keeping inconsistencies for the CCC properties, CCC and HAP should consider, at least on a temporary basis, meeting on a quarterly basis to compare notes, tenant files (within the constraints of HIPAA), number of active tenants, inspection scheduling, and household status changes to ensure accuracy related to utilization rates and performance measures.

2. Hotel Alder Property Summary

Address: 415 SW Alder, Portland, OR 97204

General Partner: Central City Concern

Property Management Company: Central City Concern

Total number of units in project: 99

Total number of PBAs: 35 SROs

PBA/non-PBA ratio: 35%

Population served: Very low-income individuals (below 50% MFI) who are in recovery from chemical dependency, have a mental illness, or are dually diagnosed.

Findings and Recommendations

The intake process, referring process, and tenancy at Hotel Alder are the same as 8 NW 8th. Just like at 8 NW 8th, averaging the length of time between each milestone of the intake process was not reliable given the wide-ranging set of dates in terms of establishing a clear pattern.

However, the major differences between Hotel Alder and 8 NW 8th were the longer average times between 1) the make ready time (when the unit is ready for occupancy) and the tenant move in date and 2) between the HAP approvals and the move in dates. Hotel Alder also has a significantly higher turnover rate with around half of its tenants leaving each year.

According to CCC’s records and analysis, Hotel Alder’s average turnover time has ranged between 25-44 days since 2006 and its physical occupancy rate (count of PBAs occupied days / potential occupied days) has hovered at around 94 percent over the last three years. Again, this occupancy rate was based on CCC’s active participant list, which did not correspond with HAP’s active participant list. With inconsistent lists of active PBA voucher holders, the consulting team was unable to verify if CCC’s occupancy records were accurate.

In cross-referencing the HAP PBA files with the CCC tenant files, it appears that the average length of time from HAP’s intake approval and inspection to move in was relatively short – 12 to 13 days – which indicates that any possible delays to the intake process is prior to HAP’s involvement. In addition, 65 percent of the inspections occurred before the HAP intake approval. The inspection was less of a delay to the overall intake process than assumed through the owner/manager interviews.

Hotel Alder – Data from HAP and CCC Tenant Files			
Percent Sampled		40% (14/35)	
	Average No. of Days	Median No. of Days	Range
Days from top of waiting list to housing application [from CCC files]	32	8	2 to 146
Days from housing application to HAP approval [from CCC files]	27	24	5 to 59
Days from HAP intake approval to move in [from HAP files]	23	11	1 to 92

Recommendation: Given the number of turns each month at Hotel Alder (an average of 2 in 2007-2008), there appears to be room for improvement to tighten the intake procedures, particularly related to the maintenance, repairs, and inspection end of the process.

3. Interstate Crossing Property Summary

Address: 6847 N. Interstate, Portland, OR 97217
 Owner: HAP
 Property Management Company: Central City Concern
 Total number of units in project: 12
 Total number of PBAs: 11 two-bedroom units
 PBA/non-PBA ratio: 92%

Population served: Very low-income families (below 50% MFI)

Findings and Recommendations:

The Family Alcohol and Drug Free Network (FAN) is in charge of the occupancy at Interstate Crossing, in addition to four other CCC properties. This purpose of FAN is to reunite children in foster care with parents who have been discharged from a residential treatment program. The unique component of this project is that the timing of a vacant unit has to align with the parents’ release of the residential treatment program, as well as when DHS allows the children to move back with the parents for the kids in foster care. Some of the children are living with the parents in treatment. The FAN case managers are cognizant of these alignment issues and work closely with all of the partners to alleviate barriers.

Staff at CCC attributes its performance issues as twofold: 1) a previous disconnection between the knowledge of what was happening with the site (via the FAN manager) and the preparation needed to get the next unit ready (via property management) and 2) incorrect tracking of the number of PBAs. One of the FAN project managers believed they only had 10, not 11 PBAs on the site. With one unit consistently not occupied, the occupancy rate at Interstate Crossing would not be able to exceed 91%.

CCC has made internal structural improvements to better align its property management department with FAN and the Mentoring Program. In the past year (since July 1, 2008), there have been many procedural changes to how the intake process works at Interstate Crossing. There have been changes to ensure that the Mentors have responsibility for coordinating with property management when units become vacant. According to Sharon Fitzgerald, one of the Project Managers, “the communication between the Mentors and the on-site staff has been 100% better.” There is now a site manager who facilitates better communication regarding potential vacant units and getting the next families ready to move in.

In cross-referencing the HAP with the CCC tenant files, the longest part of the Interstate Crossing intake process was the time from the housing application to the HAP intake approval. The FAN intake process is thorough and involves participation in services while in residential treatment through tenancy. The length of time to schedule and conduct interview between the CCC project manager, FAN provider, applicant, and sometimes a clinical psychologist extends the intake by a week that other projects do not include.

<i>Interstate Crossing – Data from HAP and CCC Tenant Files</i>			
Percent Sampled		45% (5/11)	
	Average No. of Days	Median No. of Days	Range
Days from top of waiting list to housing application [from CCC files]	na	na	na

Days from housing application to HAP approval [from CCC files]	na	na	na
Days from HAP intake approval to move in [from HAP files]	13*	12*	0 to 26 days; one after move in

*Excluding the file where the tenant's HAP intake approval date was after the move in date.

According to CCC's records and analysis, the average turnover time has varied greatly at Interstate Crossing, ranging from 45-93 days. The annual turnover, however, has been consistent with three turns out of eleven per year with its physical occupancy rate (count of PBAs occupied days / potential occupied days) hovering at around 95 percent over the last three years based on CCC's list of active participants. According to CCC, they have made improvements to the make ready time in 2007 and 2008.

According to the HAP records, 75 percent of the inspections occurred before the HAP intake approval. The inspection was less of a delay to the overall intake process than assumed through the owner/manager interviews. In addition, 44% of the vacant units (4 of 9) in the past year failed inspections at Interstate Crossing. This was the highest failure rate of all of the other properties in this review.

With the knowledge of an additional voucher, performance should improve at this property in addition to the changes to staffing to promote joint accountability between FAN and property management. the average turn at this property was between 30 to 60 days due to the alignment issues with DHS, thorough screening of the families, and larger units that generally take more time to make ready.

Recommendation: Given the additional considerations that can complicate the intake process for this particular project, CCC needs to be particularly diligent in achieving a lower inspection failure rate. The consulting team did not evaluate the physical condition of this property, and therefore, we cannot verify the amount of capital improvements needed that are generally addressed upon each turn. However, this is one area where CCC could invest additional efforts to expedite the intake process.

Cascadia Behavioral Healthcare

Findings and Recommendations

There is some confusion over PBA voucher numbers for Clinton Ridge, Mainstream and West Gresham. Cascadia's Asset Manager and HAP staff are in the process of reconciling these numbers. Even a small difference in the number of vouchers can have a significant impact on how utilization is calculated for each project.

Recommendation: Consider a more frequent check in on vouchers to insure consistency between owner records and HAP record.

Handling of large waiting lists: Cascadia's large portfolio and the large number of PBA vouchers that they manage contribute to a very complex system of waiting lists. Managing these lists is currently done by one full time staff person. Currently the oldest applicants on the waiting lists that were reviewed have wait times from one year/five months to 2 years/7months. With the transient nature of many applicants, this contributes to consider effort to track and find people.

Recommendation: Consider closing wait lists that are still open if the wait time is over one year. For the future set lower limits for all waiting lists.

Reduction in number of appeals: Cascadia staff indicated that a large number of applicants [70%] are denied housing based on their current screening criteria. Of those denied, about 70% appeal the denial, and about 60% of appeals are granted. The relatively large percentage of approved appeals suggests that the either applicants are supplying information during the appeal time that makes a difference in the decision, or that the hearings officer may take a less strict application of the screening criteria. Either possibility suggests that the screening criteria be reviewed and that the format of the appeal and the required documentation be revised.

Recommendation: Given the number of appeals that are approved and the time involved in the processing of appeals, HAP should consider discussing with Cascadia whether their screening criteria should be adjusted to reflect the appeals they are approving or whether there are changes that need to be made in their application packets to have more information submitted by applicants, and whether such changes may reduce the overall number of appeals.

1. Emerson Court Property Summary

Address: 1023 to 1035 NE Emerson

Total Number of units in the project: 4

Number of PBAs: 4 one bedrooms

PBA/non-PBA ratio: 100%

Population served: Very low income adults [below 30% MFI] with a psychiatric disability who also suffer from drug/alcohol addiction; ADFC housing

Emerson Court – Data from HAP and Cascadia Tenant Files			
Percent Sampled		83% [5/6]	
	Average No. of Days	Median No. of Days	Range
Days from top of waiting list to housing application [from CBHC files]	na	na	Missing data
Days from housing application to HAP approval [from CBHC files]	na	na	Missing data
Days from HAP approval to move in [from HAP files]	15	13	0 to 33

2. Mainstream Property Summary

Number of PBAs: 76

Population served: Very low income adults [below 30% MFI] with a psychiatric disability who also suffer from drug/alcohol addiction

Mainstream PBA – Data from HAP and Cascadia Tenant Files			
Percent Sampled		13.4% [11/82]	
	Average No. of Days	Median No. of Days	Range
Days from top of waiting list to housing application [from CBHC files]	na	na	Missing data
Days from housing application to HAP approval [from CBHC files]	33	36	28 to 36
Days from HAP approval to move in [from HAP files] [all move ins in sample occurred the same day as approval]	1.4	0	0 to 15

3. Clinton Ridge Property Summary

Address: 2730 SE 92nd Avenue, Portland

Total Number of units in the project: 29

Number of PBAs: 8 one bedrooms and 2 studios

PBA/non-PBA ratio: 27.5%

Population served: Very low income adults [below 30% MFI] with a psychiatric disability who also suffer from drug/alcohol addiction; ADF housing

Clinton Ridge – Data from HAP and Cascadia Tenant Files			
Percent Sampled		45% [5/11]	
	Average No. of Days	Median No. of days	Range
Days from top of waiting list to housing application [from CBHC files]	Limited data	Limited data	Limited data
Days from housing application to HAP approval [from CBHC files]	80	68	1 to 142
Days from HAP approval to move in [from HAP files] [all move ins in sample occurred the same day as approval]	0	0	0

4. Midland Commons Property Summary

Address: 2830 SE 127th Avenue, Portland

Total Number of Units in the project: 44

Number of PBAs: 22 per the MOU - 4 studios, 16 one bedrooms, and 2 two bedrooms

PBA/non-PBA ratio: 50%

Population served: Very low-income adults [below 30% MFI] with a psychiatric disability who also suffer from drug/alcohol addiction.

Midland Commons – Data from HAP and Cascadia Tenant Files			
Percent Sampled		29% [7/24]	
	Average No. of Days	Median No. of Days	Range
Days from top of waiting list to housing application [from CBHC files]	37	24	14 to 119
Days from housing application to HAP approval [from CBHC and HAP files]	27	15	3 to 91
Days from HAP approval to move in [from HAP files]	19	0	0 to 149*

*149 days was reasonable accommodation case.

5. West Gresham Property Summary

Address: 17257 E Burnside, Gresham

Total Number of Units in the project: 26

Number of PBAs: 24 one bedrooms and 2 two bedroom units

PBA/non-PBA ratio: 100%

Population Served: Very low income adults [below 30% MFI] with a psychiatric disability who also suffer from drug/alcohol addiction

West Gresham – Data from HAP and Cascadia Tenant Files			
Percent Sampled		29% [9/31]	
	Average No. of Days	Median No. of Days	Range
Days from top of waiting list to housing application [from CBHC files]	55	43	33 to 77
Days from housing application to HAP approval [from CBHC files]	10	5	0 to 40
Days from HAP approval to move in [from HAP files - all move ins in sample occurred the same day as approval]	0	0	0

Human Solutions

Greentree Court Property Summary

Address: 2405 SE 142nd Avenue, Portland

Property Manager: Human Solutions

Total number of units in project: 11

Number of PBAs: 4 two-bedrooms

PBA/non-PBA ratio: 36%

Population served: Permanent supportive housing for formerly homeless families.

Two of the four units are assigned to Bridges to Housing clients. All tenants have incomes at or below 30% of MFI.

Findings and Recommendations

[Note: a data table on timing is not provided for Greentree Court as the number of tenants was so few.]

Two of the four PBA units have not had any turnover since 2006. The other two units have each turned over twice since 2006. The average turnover time for these two units has been 62 days. For the four turns the times between move out and move in have been 78 days, 6 days, 99 days and 64 days.

Two of those turns [the 78 day and 99 day ones] involved very extensive tenant damages, hoarding of materials and subsequent expensive debris removal, repairs and cleaning and painting. This kind of damage is not unexpected, and can put a strain on the owner and lead to significant impact on utilization. Resolving these kinds of tenant issues usually involves a termination for cause and subsequent debris removal, clean up and repairs. While it did not occur at Greentree Court with these two cases, similar ones at other PBA sites also involved nuisance abatement actions by the City of Portland.

Recommendation: As HAP endeavors to achieve higher utilization for all PBA units, there may need to develop some consideration on how to address these kinds of situations in the utilization tracking. Even with intense social services and support for tenants, there is some small percentage of tenants in the target group served by PBAs that have tendencies to hoarding, nuisance issues, and are resistant to intervention. It may be that a “suspense” status could be used to record the time spent to resolve these kinds of situations, and to differentiate them from a usual unit turn. Continuing communication on the projected ready time would serve to keep all parties informed about progress.

HAP

[Kafoury Commons Property Summary](#)

Address: 1240 Southwest Columbia Street, Portland, OR 97201

Property Management Company: Bowen Management, Inc.

Total number of units in project: 129

Total number of PBAs: 8 studios and 3 one-bedrooms

PBA/non-PBA ratio: 8.5%

Population served: Income restricted to 50% of AMI and below.

Findings and Recommendations

[Note: a data table on timing is not provided for Kafoury Commons as the number of active tenants was so few.]

HAP is the owner of this building and has outsourced property management to Bowen Management. The on-site property manager of two years just recently discovered that she had PBAs at her property at the time of our interview. Over 2007-2008, the property had a balance of five outstanding vouchers, although these units have been occupied. With the help from her case manager at HAP, the on-site property manager has been going through the original waitlist for the PBA applicants to lease up the five vacancies. According to the on-site manager, the 11 PBAs were placed in service in 2003 as a pilot project in response to the St. Francis relocation.

The occupancy reports that HAP's asset manager received have demonstrated a consistent occupancy record for the entire building [not just PBA units] of between 90-95 percent over the last six months, but it is not the asset manager's responsibility to track the specific occupancy of the PBAs.

Ultimately, it is both the owners' and property management companies' responsibilities to track and lease up the PBA vouchers to ensure full utilization. Now that the on-site manager is aware of this under utilization oversight, she has been working closely with her case manager to quickly market the PBAs and fill them as they turn.

Recommendation: In this case, the owner, HAP, serves as both the monitor from an owner's perspective and as the administrators of the PBA program. It may make sense for the HAP asset manager and the PBA case manager to reconcile the occupancy reports with the PBA active participant lists on a periodic basis. In addition, HAP may consider allowing these units to temporarily float to eligible tenants in other units to ensure full utilization in the timeliest fashion.

There is no demographic difference between the PBA and non-PBA tenants at this project. All of the current PBA tenants have come from another unit in the building.

Although this is a common way to fill unused vouchers in a timely fashion, this does not indicate a conscience choice of furthering any particular policy objective. The average tenant at Kafoury Commons, however, has been extremely low-income and referred by a social service agency, such as Northwest Pilot Project and JOIN. About 80 percent of all of the tenants come from social service agencies referring them to go on the market waitlist. Many of them were either homeless or relocated from transitional housing.

Recommendation: If HAP determined that the use of the PBA program should advance its larger policy objectives related to serving extremely low-income populations that otherwise could not succeed in market rate housing, it may want to consider two options: 1) transferring these 11 PBAs to another project serving a different population, or 2) an amendment to the Kafoury contract that formalizes the relationship with social service agencies for use of the vouchers.

Kafoury's low ratio of PBAs to non-PBAs has not made it a priority for Bowen to invest in an active PBA waitlist system. There are two waitlists at Kafoury – one for the market units and the other for the PBAs. The market waitlist is actively managed; it is refreshed every 60 days. When someone achieves the top of the waitlist, an applicant has 24 hours to bring in an application before the manager goes to the next person on the list. The system is clear and efficient with the market unit intake process.

The PBA waitlist, on the other hand, is never purged and it can take about two years to be on this wait list. There is very little turnover for these units (only two have left in last two years) and therefore, it has not seemed cost-effective to Bowen to more actively manage the PBA waitlist.

Recommendation: To ensure that these PBAs are tracked with the next on-site manager, Bowen may consider managing the PBA waitlist in a similar fashion to its market waitlist. In addition, the on-site manager could inform market waitlist applicants about the PBA waitlist in case they are income eligible.

PCRI

Albina CDC Scattered Site PBA Property Summary

Address: Scattered throughout N and NE Portland

Owner: PCRI, acquired from Albina CDC

Property Management Company: Infinity Property Management, Inc. at time of interview (management transferred to PCRI on April 1, 2009)

Total number of PBAs: 9 two-bedrooms, 4 three-bedrooms, 5 four-bedrooms, and 2 five-bedrooms

Population served: Income restricted to 50% of AMI and below.

Findings and Recommendations

Most of the performance issues on this portfolio appear to be related to lack of expectations on the part of management for turnovers. The property manager was misinformed regarding the number of total PBA vouchers. The scattered site model requires more diligent record keeping, particularly if the units are floating. There is more margin of error for this kind of PBA model.

The (off-site) property manager in charge of occupancy does not track turnover and make ready times, and does not lay out explicit turnover and make ready goals for maintenance and other property management staff. Anecdotally, she felt that the turnover rate for the PBAs is between three and four months, but that the single-family homes go quicker. Some people will pass up the tri and duplexes while others indicate this preference upfront.

The length of time from initial screening once someone reached the top of the waitlist, which occurred when a unit was vacated or when someone provided notice to vacate, to HAP approval was extraordinarily long – 64 days in the 30 percent of tenant files reviewed. In addition, the Infinity approval time extended the intake process take by almost one month (26 days). Of the five files reviewed, three failed its initial inspection, and two failed second the one as well.

Albina Scattered Site – Data from HAP and CCC Tenant Files			
Percent Sampled		30% (6/20)	
	Average No. of Days	Median No. of Days	Range
Days from top of wait list to housing application [from Infinity files]	na	na	na
Days from housing application to HAP approval [from Infinity files]	64	44	28 to 145
Days from HAP intake approval to Infinity approval [from HAP and Infinity files]	26	21	5 to 62

Days from Infinity approval to move in [from Infinity files]	7	5	0 to 22
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With the transfer of management to PCRI, they hope to improve upon the performance of these properties due to PCRI’s planning efforts for the transfer, locational advantage, and prior experience managing a similar portfolio.

The length of time it takes to make the larger homes ready for occupancy was the secondary issue at this property. These properties are quads, duplexes, and single-family homes. The (off-site) property manager in charge of occupancy does not closely track the make ready time, but she thought it could take 30 days to get the units ready for viewing. It appeared that the make ready and inspection processes were not happening concurrently with the intake process.

One household was over income and the property manager was unable to float the unit to another building. The property manager indicated that the PBAs for this project were able to float from unit to unit within buildings but were not transferrable across buildings. Because of this transferability issue, there is one household in a single family home that is over income, which means that a voucher is going unused until this family moves out. With a fixed number of units and buildings, there may always be an under utilization issue if a household becomes over income.

These units had a disproportionately high failure rate in its inspections. The inspection occurs right around the time the applicant has been approved by HAP. According to HAP’s records, the failure rate is between 23-35 percent, which is consistent with what Infinity’s records showed.

Recommendation: Single-family homes can take more time to rent due to the additional repairs and maintenance required with each turn. For these types of projects, it is imperative that the property manager manage simultaneous processes related to getting the tenants screened and the repairs completed.

Appendix 2 - Analysis of Occupancy Rates for Projects in Study

	# PBAs	# vacant	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	
Mainstream	96	In	2	1			2	1			1	1	2	2	
		Out		1	23		1				2	1	2	1	1
	Phy vacancy		25	23	23	46	46	45	44	44	46	46	47	46	45
	Occupancy %			76%	76%	52%	52%	53%	54%	54%	52%	52%	51%	52%	67%
Midland	22	In							1	2	3				
		Out				1	1			1			2		
	Phy vacancy		4	4	4	4	5	6	6	5	4	1	1	3	3
	Occupancy %			82%	82%	82%	77%	73%	73%	77%	82%	95%	95%	86%	86%
Green Tree		In	1												
		Out	1	1											
	Phy vacancy		1	2	2	2	2	2	1	1	1	1	1	1	1
	Occupancy %			75%	50%	50%	50%	50%	75%	75%	75%	75%	75%	75%	75%
Hotel Alder		In		2	2	5		1	1		1	4		2	
		Out		2	2	2	3	1	1		2	3	3	3	2
	Phy vacancy		0	2	2	2	0	1	1	0	2	4	3	6	6
	Occupancy %			94%	94%	94%	100%	97%	97%	100%	94%	89%	91%	83%	83%
Kafoury		Out	1												
	Phy vacancy		4	5	5	5	5	5	5	5	5	5	5	5	
	Occupancy %			55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	
Clinton Rdg		In	1									2	1		
		Out	1				1								
	Phy vacancy		1	1	1	1	1	2	2	2	2	2	0	-1	-1
	Occupancy %			88%	88%	88%	88%	75%	75%	75%	75%	75%	100%	113%	113%
Interstate		In	1				2		1						
		Out	1		1				1				1		
	Phy vacancy		2	2	2	3	3	1	1	1	1	1	1	2	2
	Occupancy %			82%	82%	73%	73%	91%	91%	91%	91%	91%	91%	82%	82%
Emerson		In				1							1		
		Out	1				1					1			
	Phy vacancy		0	1	1	1	0	1	1	1	1	1	2	1	1
	Occupancy %			75%	75%	75%	100%	75%	75%	75%	75%	75%	50%	75%	75%
W. Gresham		In	1	1		1	1	1		1	1				
		Out	1	1				1	1	2					
	Phy vacancy		3	3	3	3	2	1	1	2	3	2	2	2	2
	Occupancy %			88%	88%	88%	92%	96%	96%	92%	88%	92%	92%	92%	92%
8 NW 8th		In	5		2	3	1	4			2	4		1	
		Out	2	2	3	1	1	2	1	1	3	2	1		
	Phy vacancy		8	5	7	8	6	6	4	5	6	7	5	6	5
	Occupancy %			91%	88%	86%	89%	89%	93%	91%	89%	88%	91%	89%	91%
PCRI		In	1		1			1			1		1	1	
		Out	1			1			1			1	1	1	
	Phy vacancy		4	4	4	3	4	4	3	4	4	3	4	4	4
	Occupancy %			80%	80%	85%	80%	80%	85%	80%	80%	85%	80%	80%	80%

Appendix 3 – Survey Summary

1. Survey data:

	Number	Percent
Number of Persons to whom survey was sent initially	55	
Emails returned – hard bounces	7	
Number of persons receiving survey email	48	
Number of persons responding to survey	34	
Percent opening survey who received survey		70.8
Number of persons completing survey of those who opened	23	67.6%
Percent completing of those who received survey		47.9%

OVERVIEW:

1. What is your role related to PBA units?

Role [N=33]	Number	Percent of Respondents
Building manager	16	47.1%
Case Manager	4	11.8%
Building Owner	2	5.8%
Other:	12	35.3%
Assistant Mgr ; Property mgr	4	
Social Service Agency consultant	1	
Occ/Compliance Mgr; Asset Mgr; Portfolio Supervisor/Mgr	4	
Leasing Agent	1	
Occupancy Specialist	1	
Bldg mgr/Case Manager	1	

2. Approximately how many PBA units do you work with?

Number of PBA Units you work with [N=33]	Number	Percent of Respondents
Less than 10	3	8.8%
10-25	13	38.2%
26-50	9	26.5%
51-100	2	5.9%
100+	7	20.6%

TENANT DEMOGRAPHICS:

1. In your best estimate, at time of entry into their units, what % of your PBA tenants were:								
	0%	1-10%	11-25%	26-50%	51-75%	76-99%	100%	Response Count
Homeless prior to entry [streets, shelter, etc]	13.8% (3)	22.7% (5)	4.5% (1)	13.6% (3)	22.7% (5)	4.5% (1)	18.2% (4)	22
Chronically homeless [homeless for one year or more or 4 episodes of homelessness in the last 3 years]	20% (4)	15% (3)	25% (5)	15% (3)	10% (2)	5% (1)	10% (2)	20
Coming from an institution [jail, hospital, etc.]	52.6% (10)	26.3% (5)	21.1% (4)	0.0% (0)	0.0% (0)	0.0% (0)	0.0% (0)	19
Coming out of treatment	44.4% (8)	27.8% (5)	16.7% (3)	11.1% (2)	0.0% (0)	0.0% (0)	0.0% (0)	18
I don't know	70% (7)	20% (2)	0.0% (0)	0.0% (0)	0.0% (0)	11.1% (1)	10% (0)	10
					Answered question			23
					Skipped question			11
2. In your best estimate, at time of entry into their units, what % of your NON PBA tenants were:								
	0%	1-10%	11-25%	26-50%	51-75%	76-99%	100%	Response Count
Homeless prior to entry [streets, shelter, etc]	21.1% (4)	21.1% (4)	21.1% (4)	21.1% (4)	5.3% (1)	5.3% (1)	5.3% (1)	19
Chronically homeless [homeless for one year or more or 4 episodes of homelessness in the last 3 years]	35.3% (6)	29.4% (5)	11.8% (2)	5.9% (1)	5.9% (1)	5.9% (1)	5.9% (1)	17
Coming from an institution [jail, hospital, etc.]	38.9% (7)	44.4% (8)	11.1% (2)	5.6% (1)	0.0% (0)	0.0% (0)	0.0% (0)	18
Coming out of treatment	31.3% (5)	50.0% (8)	18.8% (3)	0.0% (0)	0.0% (0)	0.0% (0)	0.0% (0)	16
I don't know	75.0% (6)	25.0% (2)	0.0% (0)	0.0% (0)	0.0% (0)	0.0% (0)	0.0% (0)	8
					Answered question			23
					Skipped question			11

3. In your best estimate, what % of your tenants is currently engaging in services?								
PBA Tenants	0%	1-10%	11-25%	26-50%	51-75%	76-99%	100%	Response Count
Engaging in on-site services at the building	15% (3)	20% (4)	5% (1)	25% (5)	15% (3)	15% (3)	5% (1)	20
Engaging in other services with my agency	29.4% (5)	11.8% (2)	35.5% (6)	5.9% (1)	11.8% (2)	0.0% (0)	5.9% (1)	17
Engaging in services with a partner agency	12.5% (2)	31.3% (5)	6.3% (1)	18.8% (3)	18.8% (3)	6.3% (1)	6.3% (1)	16
I don't know.	33.3% (3)	33.3% (3)	0.0% (0)	11.1% (1)	0.0% (0)	11.1% (1)	11.1% (1)	9
NON PBA Tenants	0%	1-10%	11-25%	26-50%	51-75%	76-99%	100%	Response Count
Engaging in on-site services at the building	16.7% (2)	38.9% (7)	16.7% (3)	27.8% (5)	0.0% (0)	0.0% (0)	0.0% (0)	18
Engaging in other services with my agency	29.4% (5)	29.4% (5)	17.6% (3)	5.9% (1)	11.8% (2)	0.0% (0)	5.9% (1)	17
Engaging in services with a partner agency	13.3% (2)	33.3% (5)	26.7% (4)	13.3% (2)	6.7% (1)	6.7% (1)	0.0% (0)	15
I don't know.	30% (3)	20% (2)	20% (2)	10% (1)	0.0% (0)	0.0% (0)	20% (2)	10
Answered Question								22
Skipped Question								11

4. What types of services are being offered to your tenants [20 responses]:

a. Case management and advocacy for applicants and residents by Northwest Pilot Project. Onsite we offer a resident computer room, a lending library, scheduled events & shopping excursions, free faxing service, help with paperwork issues for DHS food stamp & HAP, etc.

b. We have a community room that offers a microwave, coffee maker, and a computer with internet service that all of our residents can use. Wendi Anderson from The Giving Tree also comes by every now and then and does certain activities.

c. Assistance with accessing resources such as food stamps, social security, medical services, transportation, food boxes, employment. Messaging: being a person of contact for clients without voicemail. Paperwork tracking: Helping clients stay current with applications for housing and other benefits. Counseling: Helping clients manage conflict within apartment, manage addiction/mental health histories, etc. Bed bug management: helping to educate and prepare for bed bug spraying.

Rent Assistance Bus tickets Grocery and meal vouchers Housekeeping Transportation to medical appointments Recreation/socialization activities Problem-solving conflicts with other tenants Problem-solving conflicts with management Financial help with prescriptions Eviction-prevention Utility assistance Furniture Kitchen starter kits Bedding starter kits Help with application process Help moving in.

e. We have a resident services coordinator that helps residents with any issues that they may have. If she cannot help them directly then she refers them to someone that can.

- f. Portland Impact IHI
- g. Healthy Cooking Smoking Cessation Book Clubs How to Clean classes Gardening Art Game/Movie Nights.
- h. Help with applications for benefits, medical insurance, housing, food stamps. Provision of incidentals -- laundry money and soap, toilet paper and cleaning products. Referrals for housekeeping, case management, and money management as needed. Some socialization activities Transportation to medical appointments and grocery stores as needed. Conflict resolution between residents and management, and residents and neighbors.
- i. Resident Services: Eviction prevention, ESL classes, knitting club, homework club, sewing club, soccer, family mentoring.
- j. We do not personally offer services; however, we have a resident services coordinator that assists our residents in finding the services they need.
- k. Case management & services thru B2H & Impact NW Services thru JOIN Services thru DCJ Services thru DHS Services thru agencies for DVS Services thru Woodmere/Kelly school program agencies Services thru Human Solution's Residents Services in-house Staff On-site Child Care Surplus Food Delivery once a week to all residents On-Site Noon Meal available at senior property w/PBA
- l. meals prepared in the dining room available for purchase Monday through Friday.
- m. Advocacy with Managers, advocacy with SS, ADS, medical professionals, food stamps, food boxes, eviction prevention, APS reports, intensive case management services, problem solving between tenants.
- n. Resident Services for all residents Referrals for all types of assistance for all residents Food Closet for Emergency Food Clothing/Household Goods Closet for any resident.
- o. Housing Case Management - Placement, A&D referral, MH referral, retention.
- p. We have a full time resident services coordinator. There are nurses that come from Linfield College; activities like potlucks; grocery shopping with an ARC van; other activities.
- q. Resident Services through NHA.
- r. Lincoln Woods has a Resident Director who helps the residents with paperwork, from TANF, HAP, PGE BILLS, etc. We don't have scheduled services; our Director is available daily to help them with their concerns in their own language.
- s. Mental Health Services
- t. Case Management services linking tenants to a wide variety of other community resources. On site resident services available to all residents

5. In your best estimate what percent of tenants are behind on their portion of the rent?

	0%	1-10%	11-25%	26-50%	51-75%	76-99%	100%	Resp. Count
PBA TENANTS % behind on rent:	57.1% (12)	42.9% (9)	0.0% (0)	0.0% (0)	0.0% (0)	0.0% (0)	0.0% (0)	21
NON PBA TENANTS % behind on rent:	23.8% (5)	57.1% (12)	14.3% (3)	4.8% (1)	0.0% (0)	0.0% (0.0)	0.0% (0)	21
Answered question								22
Skipped Questions								11

6. In your opinion, would your PBA tenants be unlikely to succeed in the regular Section 8 voucher Program due to rental barriers, need for on-site services, etc.?

	Response %	Response Count
YES	37.5%	9
NO	33.3%	8
I don't know	29.2%	7
Answered question = 24; skipped question = 10		

SCREENING:

1. In your best estimate, what % of your tenants has the following rental barriers?								
PBA TENANTS	0%	1-10%	11-25%	26-50%	51-75%	76-99%	100%	Resp. Count
Criminal History	26.1% (6)	13.6% (3)	0.0% (0)	21.7% (5)	30.4% (7)	4.3% (1)	4.3% (1)	23
Credit Problems	4.8% (1)	14.3% (3)	9.5% (2)	14.3% (3)	25.6% (6)	23.8% (5)	4.8% (1)	21
Eviction history or bad landlord reference	17.4% (4)	13% (3)	13% (3)	26.1% (6)	21.7% (5)	4.3% (1)	4.3% (1)	23
Lack of rental history	14.3% (3)	38.1% (8)	14.3% (3)	14.3% (3)	9.5% (2)	4.8% (1)	4.8% (1)	21
Cannot pay security deposit AND cannot find agency to pay it for them.	22.7% (5)	13.6% (3)	9.1% (2)	13.6% (3)	13.6% (3)	22.7% (5)	4.5% (1)	22
NON PBA TENANTS	0%	1-10%	11-25%	26-50%	51-75%	76-99%	100%	Resp. Count
Criminal History	28.6% (6)	23.8% (5)	23.8% (5)	9.5% (2)	9.5% (2)	4.8% (1)	0.0% (0)	21

Credit Problems	5% (1)	20% (4)	20% (4)	25% (5)	20% (4)	10% (2)	0.0% (0)	20
Eviction history or bad landlord reference	19.0% (4)	33.3% (7)	19.0% (4)	19.0% (4)	9.5% (2)	0.0% (0)	0.0% (0)	21
Lack of rental history	10% (2)	40% (8)	25% (5)	15% (3)	5% (1)	5% (1)	0.0% (0)	20
Cannot pay security deposit AND cannot find agency to pay it for them.	30% (6)	15% (3)	20% (4)	5% (1)	20% (4)	10% (1)	0.0% (0)	20
Answered question								23
Skipped Question								11

2. Do you conduct any type of background screening on prospective PBA tenants (criminal history, eviction history, etc.)?

	Response Percent	Response Count
YES	95.7%	22
NO	0.0%	0
I don't know	4.5%	1

3. Describe any differences in your screening policies for PBA tenants vs. other tenants in the building (of if your entire building is PBA, differences between screening criteria at the PBA building vs. other building you manage).

- a. Criteria are less strict than usual Tax Credit criteria. Credit history is not considered, rental history is a shorter length of time.
- b. Not quite sure of the details, but the screening for our 30 PBA units is a little more lenient.
- c. NONE
- d. None. We screen everyone the same here.
- e. The Morrison and the Jeffrey use altered screening criteria for PBA units, comparable to the screening criteria used at our NWPP Senior Fresh Start Buildings.
- f. Same housing assessment and background screening for PBA and non-PBA clients.
- g. we screen them all the same
- h. NONE
- i. Do not include income as determining factor. Appeal committee to review denials. Length of time on some criminal activity is not used against (more lax)
We are less concerned about poor credit and eviction/poor landlord history related to nonpayment for reasons that are entirely related to reduction or lack of income.
- k. We have relaxed criteria for those who have completed the Fresh Start Program and are working with an outside agency such as Northwest Pilot Project.
- l. We have MOU's and or Agreements with service agencies which allow us to look at tenants on a case by case basis and or relax our screening criteria with proof of case management or support.
- m. No differences.

- n. The screening process at the Twelfth Avenue Terrace is much easier for tenants to pass, than in other buildings. It was designed that way to help the homeless and problem history tenants.
- o. All are screened the same at move in. PBA is for existing residents when unit available for PBA
- p. None. Criminal backgrounds; bad rental history; bad credit; all prospective residents are treated the same. They won't be coming in here with bad histories.
- q. Our property is Tax Credit. We use the same standards for all. There is a waiting list for the PBA units.
- r. The screening criteria is the same for all our residents, there is no difference.
- s. We don't have any differences between PBA and non-PBA.
- t. Manager does not screen, defers to Family Advocate and HAP.

4. In your best estimate, what % of your PBA applicants are denied by HAP based on the initial application?							
0%	1-10%	11-25%	26-50%	51-75%	76-99%	100%	I don't know
8.7%	4.3%	4.3%	8.7%	8.7%	21.7%	13%	30.4%
(2)	(1)	(1)	(2)	(2)	(5)	(3)	(7)
Answered question							23
Skipped question							11

WAIT LIST/UTILIZATION:

1. Do you have a waitlist for your PBA units that is separate and distinct from all other waitlists for our building/agency units?

	Response Percent	Response Count
YES	65.2%	15
NO	26.1%	6
I don't know	8.7%	2

If you answered no, please explain:

- a. All of our units are PBA.
- b. Northwest Pilot Project is in charge of finding applicants for their units here.
- c. We do not have a waitlist.
- d. PBA clients are 30% of MFI or less. They would not be able to pay the rent on the 50-60% MFI units
- e. When we have a unit available we start at the top of our waiting list and work our way down to find a family that qualifies for the vacant unit and then we send the information to HAP for their approval.
- f. We have a maximum of 22 out of 90 units that can be PBA. They are not unit specific. If an existing resident with PBA leaves our building or receives their voucher, a drawing is done to choose the next existing resident to apply for PBA.
- g. We have waitlists set up by properties.
- h. All but two units are for B2H, and so waitlist is managed by Multnomah County. Other two units use same waitlist as other units in the complex.

2. Do you have waitlists that feed your PBA units?

	Response Percent	Response Count
YES	26.1%	6
NO	73.9%	17
I don't know	0.0%	0

If you answered yes, please explain:

- We have site-specific waitlists for PBA units at the Twelfth Avenue Terrace, Morrison, Watershed, Jeffrey and Westshore.
- Since they are served by two agencies have to rotate openings
- We have separate waitlists for each building.
- We have separate waitlists for 1-bedrooms and studios.
- Set up by property.

3. On average, how long does it take you to fill a vacant PBA unit from the time prior tenant moves out?					
0 – 14 days	15-30 days	31-45 days	46-60 days	60-90 days	90+ days
36.8% (7)	40.9% (9)	13.6% (3)	13.6% (3)	0.0% (0)	0.0% (0)
Answered question					22
Skipped question					12

4. What percent of the time are your PBA units fully leased up?		
	PBA UNITS	NON PBA UNITS
Our units are fully leased 100% of the time.	12	6
90-99% of the time	10	13
80-89% of the time	1	1
60-79% of the time	0	0
40-59% of the time	0	1
Less than 40% of the time	0	0

5. Does the nature of the population you are serving in your PBA units impact your ability to keep the units fully utilized?

	Response Percent	Response Count
YES	4.3%	1
NO	91.3%	21
I don't know	4.3%	1

If you answered yes, please explain:

- There is a lot of damage.

6. In your best estimate, do your PBA units turnover more often, less often, or equally as often as non-PBA units?

	Response Percent	Response Count
PBA Units experience more turnover	0.0%	0
PBA units experience the same turnover	42.9%	9
PBA units experience less turnover	57.1%	12

Please explain:

- a. We do not have any units that are not PBA.
- b. The Section 8 rent subsidy making the unit permanently affordable along with easily accessible case mgt services leads to less turnover in PBA units.
- c. No turnovers at this time.
- d. We have 1 or 2 PBA studios that have a fairly high turnover, and other PBA 1-bedrooms that have been occupied by the same person for 6+ years. It averages out to be about the same as our non PBA units.
- e. These units do not turn near as often as regular units. Clients do not want to lose the assistance and the services
- f. In two years I've only had two PBA vacancies compared to probably six non PBA units
- g. I don't have anything to compare this to.
- h. Those with PBA are able to pay their share, if any, of the rent and therefore do not move out.
- i. The residents in PBA units tend to stay longer due to the families income. Since they cannot take the program with them they tend to stay in one place. Out of 4 PBA units that are 5 bedrooms we had not turn over in 4years. Good for us.

7. What is your greatest barrier or challenge in filling a PBA unit?

- a. Criminal background that is pending in court and too recent.
- b. Finding someone that meets the criteria and that will best fit in with the mixed population that we have.
- c. Screening Process
- d. Trying to get a hold of the prospective resident. The phone number or address that we send letters to are returned. We try to make sure that people understand when they apply that it is of the utmost importance that they keep in contact with us if they move.
- e. believe we experience no barrier to filling a PBA unit. Our barrier to housing at NWPP is fundamentally a lack of affordable, subsidized housing to offer eligible and housing ready clients.\
- f. Getting the property management firm to be flexible with their screening criteria so applicants with background barriers (criminal, credit, previous landlord debt, poor or no landlord reference, etc.) can be accepted.
- g. QUALIFIED APPLICANTS
- h. i have no problems keeping them leased up
- i. CRIMINAL BACKGROUND
- j. We only have one PBA unit and it has not been available in several years.
- k. As we work with agencies that must specifically fill the units - we often have to wait for them to find/approve thru their program persons to fill the units.
- l. Many of the people on the waiting list are difficult to reach by phone, so we need to start early when we know there is going to be a vacancy. We have started contacting several people at once from the top of the waiting list to maximize the chances that we will have a successful candidate as quickly as possible to avoid having a PBA unit sit empty.
- m. Almost every applicant is initially denied based on credit and/or criminal and we must then appeal. Often an applicant also needs a co-signer which is often difficult and getting promissory notes from agencies guaranteeing a full year of rental assistance isn't always easy.
- n. Getting the paperwork process thru HAP and our management companies requirements.

- o. No real challenges. We try to get people in on the first of the month to avoid complicated calculations regarding the subsidy amounts.
- p. The language barrier
- r. Filling units with people who have drug histories and have failed the initial application. The next step is appealing the denial.
- s. No challenge or barrier other than time: resident to complete paperwork with HAP Inspection to be scheduled and completed
- t. We have no challenge in filling a PBA unit since we have a waiting list. It takes sometimes longer due to inspections needed before the move in or the notice that is given to the previous landlord but overall it is not a challenge to get someone to move into a unit that has this great benefit.
- u. Time....making sure we schedule everything from turnover to inspection by HAP.
- v. Waiting for the family advocate to select and screen a new tenant.

WORKING WITH HAP:

1. Please rate HAP's performance in each of the areas below.

	Agree	Agree somewhat	Disagree somewhat	Disagree	Don't Know	Response Count
HAP's overall communication with respect to PBAs is clear and timely.	45.5% (10)	50% (11)	4.5% (1)	0.0%	0.0%	22
Working with HAP is easy.	50% (11)	40.9% (10)	9.1% (2)	0.0%	0.0%	22
HAP is timely in scheduling and completing intake appointments with clients.	63.6% (14)	18.2% (4)	0.0%	0.0%	18.2% (4)	22
When HAP denies a client's application for a PBA unit, the reason for denial is clear.	59.1% (13)	13.6% (3)	0.0%	0.0%	27.3% (6)	22
HAP is timely in scheduling/conducting initial inspections when new tenants move in.	45.5% (10)	45.5% (10)	4.5% (1)	0.0%	4.5% (1)	22
I receive timely notification of the results of inspections.	59.1% (13)	22.7% (5)	9.1% (2)	0.0%	9.1% (2)	22
HAP's communication and procedures in regards to the annual inspections process for PBA units are clear and	63.6% (14)	13.6% (3)	18.2% (4)	4.5% (1)	0.0%	22

	Agree	Agree somewhat	Disagree somewhat	Disagree	Don't Know	Response Count
efficient.						
HAP is timely in responding to requests for rent increases for PBA units.	40.9% (9)	18.6% (4)	18.2% (4)	4.5% (1)	18.2% (4)	22
HAP is timely in processing payments for PBA units.	50% (11)	27.3% (6)	9.1% (2)	0.0%	12.6% (3)	22
HAP mails information regarding status changes for tenants (notices, changes in tenant rent, etc) to the correct place.	77.3% (17)	13.8% (3)	4.5% (1)	0.0%	4.5% (1)	22
It is easy to reach the inspections department at HAP when I have a question about inspections for PBA units	31.8% (7)	40.9% (9)	18.2% (4)	0.9%	9.1% (2)	22
It is easy to reach the case manager(s) assigned to my building to discuss applicants/tenants and other matters related to my PBA units.	63.6% (14)	31.8% (7)	4.5% (1)	0.0%	0.0%	22
It is easy to reach HAP when I have a policy question re: PBA units.	54.5% (12)	27.3% (6)	9.1% (2)	0.0%	9.1% (2)	22
It is easy to reach HAP when I have a policy question re: PBA units.	50% (11)	18.2% (4)	18.2% (4)	0.0%	13.6% (3)	22
HAP has offered training, as needed, to ensure we continue to run an excellent PBA program.	36.4% (8)	22.7% (5)	9.1% - (2)	18.1% (4)	13.6% (3)	22

2. On average, how many business days does it take for HAP to schedule/complete an intake appointment with one of your PBA applicants? If you work with only one HAP case manager, please fill out only line one. If you work with multiple HAP case managers for different PBA properties, please fill out one line per case manager. Give your answer in number of days (enter zero if you don't know):

The respondents indicated that response time varied from 2.33 days to 3.24 days. The higher rate was noted by respondents who worked with only one case manager. Overall there

is not a significant difference in response time whether a respondent worked with one or more than one case manager.

	Range	Response Average	Response Count
Case Manager One	0 to 10	3.24	22
Case Manager Two	0 to 5	2.80	5
Case Manager Three	0 to 5	2.33	3
Case Manager Four	0 to 5	2.5	2
	Answered Question		22
	Skipped Question		12

3. on average, how many business days does it take for HAP to schedule/complete an inspection of one of your PBA units from the time you first contact HAP? Give your answer in number of days. (Enter 0 if you don't know):

Response Average	5.68 days
Response Total	125 days
Response Count	22
Range	0 to 15 days

4. Do you have any recommendations for improvements in HAP's communication or policies/processes?

- a. Overall it works pretty well, although there are delays in caseworker getting notices to vacate to inspections. Perhaps notices could get to both depts. or be received in inspections, who would then forward to caseworker.
- b. It would be nice to be included when HAP is dealing with the case managers. Sometimes, we are not filled in on what is going on.
- c. Very pleased with the Case Mgr. assigned to the properties.
- d. When starting a PSH program in a building, HAP should convene a mandatory meeting at the building for the building owner, onsite property manager, HAP Section 8 representative, BHCD rep. and participating social service agencies to discuss all issues related to the application process. HAP should make it clear in their contract with building owners that no income applicants are eligible for PSH units and that PSH contract rents (including utilities) must remain below the HAP payment standard. HAP should recommend/require building owners/property managers to be flexible in their screening criteria for PSH units. HAP, BHCD and PDC should devise a master Memorandum of Understanding which can be signed by the building owner, property manager, participating social service agencies, and HAP. Currently, the PSH building owner and social service agencies must create and sign multiple MOU's with PDC, HAP, BHCD, and each other.
- e. Sometimes the OJIN check takes a while. It would be nice to have that done faster. Also, we don't receive any paperwork that says whether a unit has passed inspection. This has created an issue in the past and if there was a standard approval/denial email that was sent out, that would create a record to prevent issues.
- f. I think there needs to be some improvement with inspections scheduling and more uniformity as to why a unit fails....all inspectors are not consistent
- g. No improvements.

h. I liked the old way of Inspections. Having Linda Dowden request the inspection worked very well. This leaving a message on the phone isn't working well. Not sure why it was changed, because for me, it was working brilliantly!

i. No, not at this time.

5. What areas do you or your staff need more training in?

	Response %	Response Count
a. Paperwork	30.8%	4
b. Eligibility/screening	30.8%	4
c. Waiting List Requirement	46.2%	6
d. Termination process	46.2%	6
e. Inspections	7.7%	1
f. Rent Increase requests	38.5%	5

g. Other, please specify:

Understanding the needs and barriers of clients to access housing

HAP should make it clear what target population is to be served in PSH units (i.e. chronically homeless, homeless, at risk of homelessness, unable to succeed in tenant-based Section 8 program, etc.)

I have some new on-site managers and our management has new compliance staff that could use some training or just general update re: program changes

None.