



# Public Housing Transformation Discussion Paper

Housing Authority of Portland

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## SUMMARY

Over the past two years, the Housing Authority of Portland (HAP) has implemented a dramatic public housing transformation, moving from the traditional centralized management system to a site-based management model. Site-based management places more emphasis on individual properties and gives site managers a significantly greater role. The site managers do more of the direct work that affects their properties, including applications, procurement, budgeting, lease enforcement, and management of vacancies. Maintenance functions are also site-based. Similar to renters in private sector housing, applicants directly apply for the properties they are interested in, giving them more flexibility and choice.

A number of factors precipitated this transition, including HAP's commitment to effective, efficient management of its public housing portfolio; the desire to provide the best possible customer service to the people who need our housing; cost considerations; and changes by the U.S. Department of Housing and Urban Development (HUD) at the federal level.

Highlights of this transformation include:

- The public housing central intake office was closed, and a site-based admissions system was instituted that allows applicants to apply at apartment communities.
- The 2,000-square-foot central warehouse, with approximately \$160,000 worth of parts and other back stock, was closed, and purchasing authority delegated to the site level.
- Public housing of maintenance operations and site management operations were integrated at the site allowing the elimination of much of the maintenance supervisory staff. Maintenance staff now report to site managers, except for a limited number of specialized trades that operate on a fee-for-service basis.
- Criteria for residency were developed as a tool to communicate the application process and screening criteria for potential applicants and community stakeholders. The screening of applicants was outsourced to a private company.
- An extensive team-based training program was implemented to provide site management staff with detailed expectations and information on the site-based management model and provide maintenance staff with detailed training on the lease and lease enforcement.

## **THE EXPERIENCE OF TRANSFORMATION**

Marilyn E. recently moved into a public housing apartment at Hollywood East, one of the apartment communities run by the HAP. This is what she had to say about her experience in finding a place to call home:

*As you get older, you want to get settled. My disabled daughter lives at Hollywood East, but I never expected to get to live here, too. But the manager said he thought a mother and daughter would be nice. Everything I wanted, he worked with me. Now I live right next door to my daughter.*

*I could talk with the manager here, instead of feeling I was a number in a stack of paper somewhere. It was a one-on-one experience. He welcomed me to the building and goes out of his way for everyone here.*

A year ago, Marilyn probably would not have had the same results in housing placement. At that time, HAP was using a centralized application and waiting list system for its 2,300 units at 40 apartment sites. This meant that Marilyn would apply to the central intake office, where she would be put on the waiting list and assigned the first available unit for which she was qualified, regardless of location. That traditional centralized approach has been accepted by housing authorities nationwide as the standard industry practice.

Over the past two years, however, HAP has implemented a dramatic public housing transformation, moving from the traditional centralized management system to a site-based management model. Site-based management allows applicants much greater choice in where they want to live, helping them find the environment that best suits their individual circumstances and that will help them succeed in their housing. Our experience to date indicates that this new approach is proving beneficial both to the agency and to applicants and residents such as Marilyn.

This paper describes the elements of the new model, the steps involved in making the transition, the issues and challenges encountered, and the next steps to be taken to ensure ongoing success.

### **WHY THE CHANGE?**

HAP made the change to site-based management both out of its own recognition of the need and advantages and in response to federal requirements.

HAP has been aware for a number of years of the cost efficiencies, increased programmatic effectiveness, and improved customer service that could be gained from reorganizing our public housing operations to a site-based model. We initiated a pilot project in 1995 that started to evaluate site-based management for several of our properties. In addition, HAP has owned a large portfolio of non-public affordable housing for a number of years. This has given us a good understanding of the private sector versus public sector model and the benefits of giving site managers the authority and responsibility to make decisions for their properties. One of the initiatives in HAP's five-year Strategic Plan, launched in 2002, called for HAP to "develop and

manage our real estate assets with the most effective blend of public and private sector practices.” That strategic initiative was aimed at reshaping our public housing assets and operations to serve our residents as effectively as possible, while trimming our cost structure.

Federal guidance and requirements began to shift when Congress passed the Quality Housing and Workforce Responsibility Act in 1998. Following passage of the Act, Congress commissioned a study of the costs of operating well-run public housing. The Public Housing Operating Cost Study (PHOCS) was conducted by Harvard University’s Graduate School of Design and completed in July 2003. The key findings and recommendations related to both the formula HUD should use to fund public housing properties and public housing authorities, and the manner in which public housing authorities should manage their properties to align with private sector rental housing conventions. Based on the study results, Congress is directing all public housing authorities to move from the traditional central management system to a more cost-effective site-based management model.

In the two years since publication of the PHOCS, HUD has issued a draft rule, collected comments, and issued the final Public Housing Operating Fund Program Final Rule on September 19, 2005. During this period, HAP has been working to transform its operation to align with the key findings and recommendations of the PHOCS. Our public housing operations are in alignment with the direction and intent of the PHOCS, HUD, and Congress. Further, as of September 2005, our public housing portfolio is being operated in full compliance with the asset management requirements outlined in the final rule.

#### **Organizational Benefits of Site-Based Management for Public Housing**

- Blends best practices of public and private sectors, creating a management structure that is more in alignment with proven property management practices.
- Achieves greater consistency in how HAP asset manages all of its real estate (including public housing and affordable housing portfolios)
- Reduces administrative costs and provides greater financial and programmatic efficiencies.
- Improves customer service and increases stability and livability for residents
- Allows HAP to remain a good steward of its public housing assets and funding.

## **IMPLEMENTATION TIMEFRAME**

Planning for the move to site-based management began in January 2004, and full program implementation was in place by September 2005.

HAP's earlier limited site-based management and its ownership of non-public housing provided beneficial experience in planning and implementing the transition. In addition, HAP's public housing administrative offices and central maintenance warehouse, located at the Columbia Villa public housing community, had to be relocated when Columbia Villa was razed in October 2003 to make way for redevelopment under a HOPE VI grant. In anticipation of this move, HAP initiated some early planning for program reorganization and operations. Still, the comprehensive, program-wide planning was not started until January 2004, and the fast-track schedule to full implementation proved at times to be a challenge.

Based on the planning work started in January 2004, HAP began a site-based management pilot for 600 units in the West Area (one of HAP's three geographic public housing regions at the time) in June 2004. The site-based model was implemented across the entire public housing portfolio of 2,300 units in September 2004. HAP continued to work on developing and finalizing the various elements required to support the model (such as criteria for residency, community input, staff training, needed policy modifications, and other operational procedures, as discussed below), achieving full implementation in September 2005.

Attachment 1 is a chronological summary of transition highlights. As HUD publishes more guidance, HAP will continue to refine and implement its procedures and systems.

## **SITE-BASED OPERATIONS**

### **Onsite Team**

The transition to site-based management started with developing a new way of thinking about the staffing structure. The establishment of onsite teams—consisting of a site manager, assistant site manager, and maintenance staff—was a focal point of the new model.<sup>1</sup> This critical first step allowed HAP to eliminate centralized functions and make subsequent transitions to additional site-based procedures.

Under the centralized management system, site managers had limited responsibilities. The central occupancy office staff was responsible for filling vacancies, and maintenance supervisors dispatched workers to sites as needed. Site managers had little control over the work of these staff members.

Site-based management places more emphasis on individual properties and gives site managers a significantly greater role, enabling them to make decisions about what their properties and residents need. This approach has many advantages.

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<sup>1</sup> Some site managers are responsible for more than one building, with a total of 20 site managers for HAP's 40 public housing communities. Some maintenance workers also are assigned to more than one building. However, these assignments are fixed, and each property has a designated team.

- Because unit turnover and the admissions process are managed by a site manager, both processes are more efficient. When move-out notice is given, site managers immediately begin the process of finding the next qualified person on the waiting list. For apartment communities with high turnover, site managers can have prospective residents pre-screened for maximum vacancy management efficiency. This ensures that no unit sits empty and enables applicants to be housed more quickly.
- A relationship between the site manager and potential residents is able to begin the first time a potential applicant visits an apartment community. This gives the site manager the opportunity to answer questions and discuss behavioral expectations at the earliest possible juncture.
- Rather than being on-call and dispatched from a central location, maintenance staff are assigned to specific sites and directly supervised by the site manager.<sup>2</sup> This makes them more readily accessible and more familiar with the property.
- Site managers and maintenance staff are able to directly procure supplies and materials with purchase cards or from pre-approved vendors on an as-needed basis.
- Site managers are responsible for their own budget and financial results, enabling them to better manage, control, and track costs. Properties are managed as a business, with a focus on the accountability and performance required for maximum income and appreciation of assets.
- Strong working relationships are forged among managers, maintenance staff, and resident services staff working on the same site. Increased responsibilities bring opportunities for cooperative problem solving and instill a sense of ownership. This in turn enhances the livability of HAP's public housing communities and promotes the successful residency of the people who live there.

Because this transition involved a great deal of work and change within a short timeframe, intensive training was provided for all involved staff members (see page 7)

### **Elimination of Central Functions**

With site-based maintenance and procurement in place, HAP was able to close its central warehouse. The site-based application process also enabled HAP to close its central intake office. As a result, two maintenance supervisor positions, two secretarial positions, and eight intake staff positions were eliminated.

HAP previously grouped its properties into three geographic regions. These have been consolidated into two regions, each with a property manager who supervises the site managers in that region.

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<sup>2</sup> Some maintenance functions operate on a fee-for-service basis, including garbage collection, recycling, electricians, and plumbers.

A dedicated position—an Admissions and Program Compliance Coordinator—has been established to be responsible for training; quality control of the site-based waiting lists, including fair housing considerations; the due process system; the severe housing need priority system, and data gathering and analysis.

### **Additional Staff Operational Changes**

Because the responsibilities of site managers and assistant site managers have increased substantially, new job descriptions were developed to reflect their new duties. Salary ranges were adjusted upward to correspond with the revised job descriptions. Site managers meet regularly with their property manager to gain one-on-one help with the new system and address problems with the new system as they arise.

As HAP dealt with the new job duties, we worked closely with our employee union groups.<sup>3</sup> This was important because in the decentralized work environment, employees—particularly maintenance staff—would be expected to perform a wider variety of duties at the properties. Having anticipated this a couple of years earlier, HAP management worked hard with trades union representatives to explain the overall direction and, in the bargaining process, to create new, more flexible job classifications that could help support the new work environment. When necessary layoffs occurred in public housing and other programs, HAP worked to reassign some staff to serve functions previously outsourced.

Because site managers now supervise maintenance staff, they have to become familiar with the trade union employees' union contract. Trade union representatives and trade union employees who were used to doing business with only three or four maintenance supervisors now deal directly with 20 site managers. These changes involve an ongoing learning curve on all sides.

### **Site-Based Budgets**

In eliminating its centralized budgeting system, HAP considered whether to disperse budgeting functions to the individual property level or to group properties for budgeting purposes. The decision was to use the first approach, following the private sector model. Each property has its own operating budget, which the site manager administers to meet all the property's needs. Starting in February 2006, site managers will also be responsible for collecting rent at the site office. Payroll and accounting are still centralized HAP functions.

### **Procurement**

Site managers and maintenance staff now procure site-based goods and equipment, and services with their own budget within the approved expenditure thresholds. This allows them to acquire what they need quickly and directly. HAP has established accounts with a number of suppliers, and has issued purchase cards to the site staff to facilitate purchases from those vendors who accept credit cards. Site managers have expenditure authority to approve invoices and purchase orders up to \$5,000. For major purchases above the site-managers expenditure thresholds, the purchasing department initiates the formal procurement process and secures needed goods or equipment so the site managers can stay focused on managing the individual properties. The site

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<sup>3</sup> Assistant site managers are represented by the American Federation of State, County and Municipal Employees (AFSCME), and maintenance staff are represented by eight trade unions.

managers can then access the goods and contracts secured by the purchasing department for their respective properties through the purchase order process.

### **Computer Systems**

HAP uses the Yardi computer system to manage budgeting, accounting, purchase orders, site-based waiting lists and required HUD reporting information. The change to site-based management required staff to investigate the system's capacities and enable functionality not used in the centralized operating environment. For example, site-based waiting lists had to be established for each individual property. Functions that were previously performed by the eight central intake staff (e.g., application processing and waitlist management) are now performed by the site managers and assistant site managers, requiring a great deal of computer training. All site-based staff have now been trained to use the budget modules, maintain their own waiting lists and many other Yardi functions previously performed by centralized staff.

### **Technical Assistance**

HAP strategically engaged contractors to provide technical assistance with some aspects of the program transformation. These included:

- A consultant who helped with the transitional change, including staffing reductions and the physical relocation of staff and facilities.
- A consultant who had been involved in conducting HUD's Public Housing Operating Cost Study, who helped ensure that HAP fully understood and fulfilled HUD's new requirements.
- A consultant with expertise in HUD regulations and landlord-tenant law, who supported HAP in developing the criteria for residency and engaging more active involvement from law enforcement in HAP's public housing transformation.

### **Training and Team Building**

Training was a very important part of the move to site-based management, and an extensive training curriculum was developed. The entire onsite team—site managers, assistant site managers, and maintenance staff—received training on all key elements of being a landlord, including customer service, landlord-tenant law, maintenance programs, and property management finance. This comprehensive cross-training reinforces the team concept and helps the team members understand each others' roles and responsibilities, which in turn benefits the overall site management and resident experience. The elements of the training program attended by staff in June, July, and August 2005 are shown below and detailed in Attachment 2. Staff will periodically be refreshed on the standard training elements and new training will be developed as needed to address new duties or circumstances.

#### **Training Elements**

- History
- Site-based management
- Computer training (Yardi and Excel)
- Maintenance programs
- Landlord-tenant law
- Basic property management finance

- Supervision
- Time management and stress management
- Customer service
- Team building
- Ethics in property management

A workshop was also held in spring 2005 to inform all agency staff of upcoming agency changes, including the public housing transformation.

Another important element was establishment of a “kitchen cabinet” – a group of about 20 employees from different areas and job levels within public housing and housing services that participated in the planning and decision-making process throughout the transition. This group provided invaluable review and ideas, and also served as a liaison between HAP management and the workers who would be affected by the changes. The kitchen cabinet was involved in all aspects of the change, including the application process, criteria for residency, lease revision, and financial systems. In addition, it helped develop and conduct some of the training elements.

### **Policy Revisions**

To make the move to a site-based admissions system, HAP had to change many aspects of its current admissions policies. The Board approved the following admissions policy changes in March 2005:

- Waiting list management policy
- Unit size (number of bedrooms) policy
- Transfer policy
- Visitation policy
- Income eligibility review policy

### **SITE-BASED ADMISSIONS**

The move to a site-based application and waiting list system considerably enhances the resident experience. In the old system, applicants had no choice in housing assignment and went to an apartment community for the first time when they were ready to see the apartment assigned to them. In the new model, the relationship between the site manager and potential resident starts from the first step, when the applicant expresses interest in an apartment community and can apply for residency directly at that site. The procedures and materials now in place are outlined below.

#### **Information and Application**

Potential applicants are encouraged to obtain information about public housing opportunities by directly contacting apartment communities, calling HAP’s public housing hotline, or accessing the HAP website. HAP encourages applicants to visit the properties in which they are interested so they can view the apartments, amenities, and neighborhood before choosing their new home. At the apartment communities, the site managers provide the following information and discuss it with applicants:

- Criteria for residency (see below for additional discussion)

- Application
- Booklet of the entire public housing portfolio
- List of open waiting lists, with estimated wait times

All site managers are able to provide information about the entire public housing portfolio. They also provide information about the estimated waiting time for each property, which applicants can weigh in their decision-making. The site manager encourages applicants to visit all of the apartment communities in which they are interested.

If applicants decide to pursue residency, they complete a simple, one-page application, designating up to three choices of housing location. Or, if they prefer, applicants can sign up for the first available unit for which they qualify in any building.

After an application is submitted, the site manager reviews it to determine if the applicant meets income and program eligibility requirements.

### **Bedroom Size**

HAP no longer specifies the number of bedrooms an applicant qualifies for, based on various household characteristics such as gender and age of children. Instead, applicants qualify for a range of bedroom sizes based on the number of household members and may choose the unit that works best for their household. Households can choose a living situation that involves two persons per bedroom or they may choose to apply for a unit with more bedrooms, up to the maximum for which they qualify. The purpose of this more flexible bedroom size standard is to provide the applicants with more choice and to limit the number of transfers once households are living in a public housing apartment community; the new transfer policy is much more restrictive regarding when transfers will be considered. In general, there will be longer waits for the units with more bedrooms, which may cause applicants to select smaller units.

<b>Bedrooms</b>	<b>Number of Persons</b>	
	<i>Minimum</i>	<i>Maximum</i>
Studio	1	2
1	1	3
2	2	5
3	3	7
4	5	9
5	7	11
6	8	13

### **Criteria for Residency and Screening Process**

HAP has developed *Public Housing Apartment Criteria for Residency* to clearly define the application process and criteria for residency. This important document provides fair and consistent guidelines that are applied to all applicants. It succinctly identifies HAP's requirements and expectations, as well as applicants' rights. The criteria for residency were

developed with considerable community input (see page 10) and are a valuable tool for keeping HAP's apartment communities safe and livable.

Each household member over 18 year of age must pass the following criteria for residency:

- No false information.
- Verifiable, positive residential history.
- No past due debts for rental obligations (unless due to excessive rent burden).
- No serious criminal activity or other dangerous behavior.
- No current abuse of alcohol and/or drugs.
- Other relevant cause. HAP reserves the right to deny for any other reason discovered and determined to be relevant to an applicant's ability to fulfill lease obligations.

When applicants reach the top of the waiting list, all household members over 18 attend a pre-screening interview and fill out an in-depth screening application. At this meeting, the site manager explains the screening process and discusses any issues that might result in problems with the application.

HAP uses a private company to perform the screening, based on the criteria for residency. This allows an objective third party to make decisions, enabling site managers to focus on developing positive relationships with potential residents. The screening company provides a recommendation for approval or denial. Once the recommendation is received from the screening company, HAP site staff have an opportunity to consider mitigating circumstances before sending the denial letter. Further, applicants whose applications are denied have the right to request an informal hearing.

### **Revised Lease**

HAP is revising its standard resident lease to improve our ability to ensure that public housing residents enjoy safe, peaceful, and habitable communities. The proposed lease is congruent with the criteria for residency, providing another opportunity to define mutual expectations clearly and consistently. It is more user-friendly than the previous lease—about half the length and reorganized so elements important to residents (such as payment terms and resident responsibilities) come first.

Major changes focus on resident conduct and accountability. They include stronger language concerning on-time rent payment and imposition of a late rent fee; new language regarding resident and guest behavior; and clarified community rules (e.g., parking rules, housekeeping expectations, lawn maintenance, pets, smoking, noise) that residents and guests must follow for the well-being of the property, residents, and neighbors.

### **COMMUNITY INVOLVEMENT**

HAP takes community involvement very seriously, and seeks review and advice as the agency faces challenges and plans changes. The community process for the move to site-based management focused on the criteria for residency, but also provided stakeholders with an opportunity to better understand and comment on the overall transition. Multiple community partners were involved at an unprecedented level. These included the Portland Police Bureau, Multnomah County District Attorney's Office, City Crime Prevention Office, Legal Aid, Oregon

Law Center, Severe Housing Need priority agencies, and other service providers. These participants provided a range of perspectives that helped HAP develop balanced, fair criteria.

A 30-day comment period is currently underway for the proposed lease revisions. HAP has sought input not only from community stakeholders, but also from residents who will be affected by the lease provisions.

HAP will continue to involve its community partners as the site-based management model evolves and additional issues or adjustments arise.

## **EARLY OUTCOMES**

### **Initial Cost Savings**

Early measurable results reflect the reductions in public housing full-time employees and the rent savings that resulted when the central warehouse was eliminated. These initial cost savings are shown below.

Supervisory Staff (2 FTE)	\$150,000
Administrative Staff (2 FTE)	80,000
Leased Space Elimination	240,000
Reduction of intake staff (8 FTE)	300,000
<b>Total</b>	<b>\$770,000</b>

Because the transition is so recent, only initial site-based cost comparisons have been conducted; however a significant investment of staff time will be focused on this critical analysis. (see Next Steps on page 13)

### **Staff Experiences with Site-Based Management for Public Housing at HAP**

- Public housing management staff continue to provide residents with quality customer service. There has been no increase in complaints from residents.
- New residents continued to be housed during the dramatic transformation of the intake process. This indicated that staff were behind the shift to site-based management even during the most stressful of times.
- Teamwork was stretched and developed to a new level within the site-based team. Teams' "ownership" of their properties has developed, and site management staff are taking a more active role in how buildings are managed and maintained. Each team member has value and purpose and influences the overall management of the property.
- The public housing management team has dedicated more time and energy developing training programs for staff than ever before in the historical management of public housing.

- A new standard of training has been set for maintenance employees, who are now engaged in customer service training, budgeting, marketing, and lease enforcement.
- Public housing managers were tasked to push the boundaries of innovation and not be afraid of altering standard practices.

## CHALLENGES AND LESSONS LEARNED

- Change is difficult, and change at this scale and pace caused anxiety for some employees. At the same time, substantial federal funding reductions were forcing the agency to make staff cutbacks in other departments, adding to the climate of uncertainty. Day-to-day functions had to continue in the midst of upheaval. It was very important to devise a solid approach and take the time to keep employees informed of the changes. Even so, it was difficult at times to avoid distrust and fear and to achieve buy-in on the transition.
- Eliminating the central warehouse and disseminating procurement functions to the individual housing sites is a major operational change. It requires relinquishing central control and trusting the site managers to fulfill this new responsibility. HAP's central purchasing managers were receptive to the change, recognizing the benefits it provided. This may not always be the case, however, where central procurement is a longstanding and entrenched agency function.
- Similarly, the central intake office is an historical fixture of housing authorities, and there may be some resistance to delegating this significant authority to site managers.
- The shift to site-based management required a major investment of time from the senior managers in the public housing department. While the transformation was underway this took away from their ability to spend as much time at the properties as they would have liked.
- Site managers took on considerable new responsibilities, requiring intensive training and support. Some individuals were willing and able to meet this challenge, while others chose to leave, either before the transition was implemented or after trying it out for the first quarter. It is important to be prepared for some staff turnover.
- If there is a union environment, it takes time to process the changes with the union(s). A considerable amount of time was spent educating union representatives on the status of public housing funding and future funding issues/crises, building a relationship of trust, and retooling union job classes that would benefit the union worker. A good working relationship with the trade union group was to HAP's benefit during this process.
- Some maintenance workers were not used to interacting with residents to the degree now required. The training process needed to prepare for and support this transition.
- The involvement of employees through the "kitchen cabinet" was extremely helpful. It provided feedback throughout the transition, and avoided using only a "top down" approach to decision making.
- The work done to date has been extensive, but in some ways has only just begun. Site managers are overwhelmed at times by their greatly increased responsibilities and by the demands of serving a diverse and sometimes difficult customer base. It is important to avoid becoming too confident of "declaring victory" and to recognize that ongoing monitoring and

support are critical. The agency must be certain to stand behind this major change and ensure that it really takes root.

## **NEXT STEPS**

Next steps will involve evaluating, refining, and adjusting the site-based management model from all perspectives, including staffing, budget, and the resident experience. This will include making adjustments as necessary to comply with new HUD guidance as it is issued.

### **Staffing**

- The overall staffing structure will be evaluated to determine if there is sufficient staff to run a site-based program effectively. If staffing is not sufficient, additional funding needs and resources will be examined.
- It is essential to ensure that site managers have the support and tools they need to be successful. Continuing staff training and evaluation will be provided.

### **Costs**

- Quarterly budget evaluations will be performed at the site level and the public housing department level. The former will be in conformance with HUD's new PUM (per unit measure) parameters. The latter will look at the cost of central overhead functions, such as information technology, administrative staff, and policy and planning.

### **Resident Experience**

- HUD's annual resident satisfaction survey (administered in the spring) will be used as one tool to measure the resident experience, comparing last year's results (before the transition) with this year's results (after the transition).
- HAP will look at other possible ways to assess the resident experience. For example, do the new criteria for residency and revised lease seem to be clarifying residency terms and expectations? Does a clearer lease with stronger expectations equate to more or less evictions? Are people making better progress toward gaining self sufficiency and moving out of public housing?
- HAP will also consider the best ways to meet the social service needs of public housing residents at the site level. This will involve working with community partners to determine the most effective and efficient service delivery methods, building on the concept of the onsite team to establish strong linkages and working relationships.

The effort required to make the transition to site-based management has been considerable, and there is more hard work to be done. On balance, however, we are convinced that this new model is in the best interests of the agency and the residents we serve. HAP and other housing authorities will continue to encounter the difficulties posed by funding shortfalls, diminishing resources, and hard-to-house populations. We believe this management structure is both more efficient and more responsive, putting us in a better position to deal with these circumstances and meet other inevitable future challenges.

In the end, the success of this transition will be measured by the success of our residents. Is Marilyn E. faring well in her new home? Will we be able to sustain safe and healthy communities for her, her daughter, and others who need our assistance? Our next steps will focus on doing what is needed to ensure positive answers to these questions.

## **Attachment 1: CHRONOLOGY OF TRANSITION HIGHLIGHTS**

### **January 2004**

- ➔ Planning begins for transition to site-based management model for public housing portfolio.

### **June 2004**

- ➔ Site-based management model pilot begins in the West area, 600 units in a specific geographic region in the City of Portland. This pilot includes:
  - Having maintenance staff report to site managers.
  - Shifting vacate and preventative maintenance functions to site-based oversight.
  - Implementation of site-based procurement.

### **September 2004**

- ➔ Site-based management model is implemented across the entire public housing portfolio of 2,300 units. Three regions (East, West, and North) are consolidated into two regions (East and North/West) and two management positions (property manager and maintenance supervisor) are eliminated.

### **October 2004**

- ➔ HAP centralized warehouse is closed.
- ➔ Administration/operations facility rented from Multnomah County is closed.
- ➔ Centralized waiting list is closed, except Terminal and Congregate Housing priorities.

### **December 2004 – February 2005**

- ➔ An intensive community process focuses on getting input into the new site-based application and waiting list system. A wide range of community partners participate in this community process.
- ➔ Staff training on site-based budget development is conducted.

### **February 2005**

- ➔ Criteria for residency are finalized, clearly outlining the process and criteria that will be used for all applications submitted for public housing.
- ➔ Site-based budgets are developed for all public housing properties.

### **March 2005**

- ➔ HAP's Board of Commissioners approves policy modifications needed to implement the site-based application and waiting list system.
- ➔ Computer system modifications are complete for the shift to the new system.
- ➔ All public housing applicants on central waiting list receive a packet that provides information, and a return response required application, for the new site-based application and waiting list system.
- ➔ All public housing staff (including maintenance staff) attended nationally acclaimed landlord training, customized for HAP's new system, which covered new screening criteria concepts and resident lease enforcement/livability expectations.

**April 2005**

- New position is hired—Admission and Program Compliance Coordinator—to monitor waiting lists, compliance, etc.
- HAP contracts with a private screening company that will screen all applicants for public housing using the criteria for residency developed by HAP.
- Central intake office is eliminated and staff redeployed.

**May 2005**

- Private screening company screens first public housing applicants and meets with HAP staff to review process and ensure that both parties are in sync on the criteria and process.

**July 2005**

- Public housing site managers assume responsibility for new site-based application and waiting list system.

**August 2005**

- Selected site-based waiting lists open for new applicants.

**September 2005**

- First resident housed that had been through entire new system from applying onsite to moving into PH apartment community.
- All PH staff attend training focused on training maintenance staff on new lease and general lease enforcement practices.
- Proposed PH lease revision released for 30-day public comment period.

**Winter 2006**

- Lease enforcement system revamped to reflect clearer expectations in criteria for residency and lease. Site staff to be trained on new system and expectations.
- Site-based rent collections system to be implemented.

➔ **Attachment 2: TRAINING ELEMENTS**

Module	Topics
History	<ul style="list-style-type: none"> <li>• Public housing then and now</li> <li>• HAP 2004-2006</li> <li>• Strategic Plan 2005/the 12-month picture</li> </ul>
Site-based management	<ul style="list-style-type: none"> <li>• HAP's definition</li> <li>• New area models</li> <li>• Clarification of new roles</li> <li>• Implementation steps/phases</li> </ul>
Team building	<ul style="list-style-type: none"> <li>• Who the property management team is</li> <li>• Define a functional team</li> <li>• Define a dysfunctional team</li> <li>• Team-based communication</li> <li>• Team-based problem solving</li> </ul>
Ethics in property management	<ul style="list-style-type: none"> <li>• Ethics of property management</li> <li>• Professional property management</li> <li>• Property management etiquette</li> </ul>
Customer service	<ul style="list-style-type: none"> <li>• Showing the apartment</li> <li>• Maintenance service</li> <li>• Site office protocol</li> <li>• Customer satisfaction surveys</li> <li>• Services provided at the site</li> </ul>
Time management and stress management	<ul style="list-style-type: none"> <li>• Time management video and training</li> <li>• Basic calendar class</li> <li>• Stress management tips</li> </ul>
Maintenance programs	<ul style="list-style-type: none"> <li>• Preventive maintenance</li> <li>• Vacancy preparation</li> <li>• Routine maintenance requests</li> <li>• Emergency maintenance</li> <li>• Housing quality standards (HQS) inspections</li> <li>• Housekeeping inspections</li> <li>• Real estate assessment center (REAC) inspections</li> <li>• Basic maintenance session with site staff</li> <li>• Knowing my building</li> </ul>
Landlord-tenant law	<ul style="list-style-type: none"> <li>• Eviction prevention</li> <li>• Documentation</li> <li>• Lease enforcement cycle and FED process</li> </ul>
Basic property management finance	<ul style="list-style-type: none"> <li>• Basic finance knowledge</li> <li>• Site-based budgeting</li> <li>• Purchasing</li> <li>• Rent collection</li> <li>• Budget variance reporting</li> </ul>
Supervision	<ul style="list-style-type: none"> <li>• Performance appraisals</li> <li>• Performance coaching</li> <li>• Supervising an AFSCME/trade employee</li> </ul>
Computer training	<ul style="list-style-type: none"> <li>• Knowing the basics of Windows</li> <li>• Groupwise/Email</li> <li>• Purchasing</li> <li>• Yardi</li> </ul>