ISOTHERMAL PLANNING AND DEVELOPMENT COMMISSION

111 West Court Street
P. O. Box 841
Rutherfordton, North Carolina 28139-0841
Phone: (828) 287-2281 • Fax: (828) 287-2735
Website: http://www.regionc.org • E-mail: sdadson@regionc.org

Request for Qualifications (RFQ)
Landlord Outreach Services/Mobility Counseling

June 2, 2020

Table of Contents

IPDC Request for Qualifications (RFQ)
Landlord Outreach Services/Mobility Counseling

I. DESCRIPTION OF PROJECT

Responses to this RFQ will be used to determine the relative qualifications of various firms to perform the scope of work and the tasks specified. Isothermal Planning and Development Commission (IPDC) is seeking a qualified, realtor, consultant, or property management firm to provide landlord recruitment, marketing, and training to increase the pool of housing providers available to serve low-income families in our jurisdiction. The objective of this RFQ is to solicit interest and credentials from qualified individuals and/or firms. It is anticipated that an agreement for professional services will be negotiated and executed between IPDC and the firm or individual who is determined to best meet the needs of IPDC for this project.

Questions about this RFQ shall be in writing or electronic writing (email) and directed to the IPDC Community Development Specialist at the address below. **The deadline for submitting questions regarding this RFQ is June 30, 2020, by 5:00 PM.**

IPDC
ATTN: Tammy Phillips
P. O. Box 841
Rutherfordton, NC 28139-0841
tphillips@regionc.org

II. PROJECT BACKGROUND

IPDC serves as the council of government for the Isothermal region, which includes Cleveland, McDowell, Polk, and Rutherford counties. The IPDC membership consists of the local governments in the Isothermal region. IPDC serves its members and their citizens by fostering regional collaboration and providing professional and technical expertise. The Commission houses the region's Area Agency on Aging**,** Housing Programs**,** Rural Planning Organization**,** Workforce Development Board, and provides services through its Economic, Community, and Workforce Development programs and Technical Assistance programs.

IPDC serves as the Public Housing Authority (PHA) for the Isothermal region and operates housing offices in Rutherfordton, Shelby, and Marion. Historically, the Isothermal region has struggled to procure eligible properties and landlords to serve the demand for the region's residents who apply for the housing programs. As mentioned previously, the objective of this RFQ is to solicit interest and credentials from qualified individuals and/or firms who will work with IPDC to provide landlord recruitment, marketing, and training to increase the pool of housing providers available to serve low-income families in the Isothermal jurisdiction.

A. This RFQ contains, in general terms, the overall objectives of IPDC in obtaining the service of a consultant. While an attempt is made to describe the general expectations of the IPDC and the anticipated work to perform, IPDC and the successful applicant will need to define a more specific scope of work and fee schedule as part of a negotiation process. If it becomes necessary to revise any part of this RFQ, written amendments will be provided to all potential firms proposing.

B. Each firm providing a proposal for consideration by IPDC is responsible for obtaining the information on the conditions and restrictions involved in meeting the obligations and providing the services as outlined in this RFQ. The failure or omission of a firm to obtain adequate information will in no way relieve the firm of any obligation to this RFQ or an associated contract.

C. All procurement procedural questions concerning the RFQ should be made **in writing or in electronic writing (email)**, to:

IPDC
ATTN: Tammy Phillips
P. O. Box 841
Rutherfordton, NC 28139-0841
tphillips@regionc.org

D. Proposals must arrive at the previously listed address no later than **June 30 at 5:00 PM**, at which time the said proposals will be opened and reviewed. Late proposals will not be accepted. One (1) original and four (4) copies of the firm's proposal must be submitted. All proposals and supporting materials should be enclosed in a sealed envelope, properly marked, with the proposal number on the front of the envelope. All proposals must be valid for a period of one hundred (120) days after opening. Firms may be asked to meet with IPDC staff to discuss any portion of their proposal before a decision is made concerning responses to this RFQ. Firms responding will be responsible for any costs associated or incurred in preparing or responding to this RFQ. **All submitted responses will be retained as property of IPDC and will not be returned.**

E. **The proposal must contain a handwritten signature of an authorized representative of the responding firm.** Responding firms will not be allowed to make any changes or corrections after proposals are submitted to IPDC.

F. IPDC reserves the right to accept and/or reject any proposals and to waive any technicalities.

III. SCOPE OF WORK

The Scope of Work will require the following services:

- Increasing participation of new property owners and landlords for IPDC's Housing Choice Voucher (Section 8) program by 25%
- Create marketing and recruitment materials for new landlords
  - Create an IPDC Housing Choice Voucher (Section 8) Landlord brochure
  - Create an electronic list of interested landlords
  - Create a landlord advisory panel of no more than five (5) members
- Provide training and training materials to potential landlords, including but not limited to:
  - Overview and benefits of the HCV Program
  - Fair Housing Rules and Regulations
  - Housing Quality Standards Inspections
  - HUD Forms
    - Request for Tenancy Approval
    - HAP Contract & Tenancy Addendum
    - Lease
- Conduct at least four (4) landlord outreach events either in person or via webinar for interested landlords throughout the counties within the next twelve (12) months after the award us received
- Conduct at least one (1) landlord summit within the next twelve (12) months after the award is received
- Create a landlord survey form
  - Conduct at least one landlord survey for customer service feedback
- Create and maintain a database of properties and landlord information that participate in the Housing Choice Voucher program
- Work with voucher holders to provide mobility counseling as needed to secure units in choice neighborhoods

Please review the attached Housing Choice Voucher Landlord Guidebook and Flow Chart of Lease-Up Process for Landlords, Public Housing Authorities, and Tenants for more guidance on the stated Scope of Work.

IV. QUALIFICATION STATEMENT PREPARATION

A. Interested firms shall submit one (1) original and four (4) signed copies of their proposal to the IPDC Community Development Specialist Tammy Phillips. The proposal should be organized according to the outline shown in this section of the RFQ. Brevity, clarity, and relevance are desired.

B. All proposing firms should have the following professional experience and be able to demonstrate their experience:

   a. Experience with the Housing Choice Voucher program target audiences. For example, seniors, low-income families, multigenerational families, and others.
   b. Experience creating strong relationships with landlords and property owners
   c. Experience working with federal programs such as HUD and the Housing Choice Voucher program
   d. Knowledge of local, state, and federal housing programs
   e. Familiarity with the Isothermal region (Cleveland, McDowell, Polk, and Rutherford Counties)

C. The firm must be able to demonstrate that the staff it would assign to this project possess the ability to lead and manage work teams that are multi-disciplinary and multi-functional. Also, proposing firms must be able to demonstrate that they possess the ability to develop, monitor, control, and manage changes in a project's scope, time, resources, cost, and risk.

D. Proposals will be considered based upon the documented qualifications and applicable experience of the firms proposing. It is anticipated that the successful firm and IPDC will work together to develop a more detailed scope of work with activities and issues to be addressed to include the identification of specific project goals and schedule milestones.

V. FORM OF PROPOSAL/QUALIFICATIONS

A. **General Information**

   a. Provide the firm name, address, telephone, and fax numbers of the office, and, if applicable, the branch office designated for this project.
   b. Provide a general description of the capabilities of your firm, including information related to its history, size, principals, professional staff, and structure.

B. **Experience and Personnel**

a. Identify and describe projects your firm has completed which are similar in scope to this project.

b. Describe the personnel who will be assigned to this project. Include their experience and qualifications. Indicate their specific role in these projects and experience in similar projects. Identify the person who is expected to be the primary contact.

C. **Project Approach**

a. Based on the information presented herein, describe the overall approach the firm will take for this project, and list the specific services that will be provided. The description should delineate specific tasks to be undertaken in each phase.

b. Describe the management plan to be used, including staffing configurations. Provide assurance that the personnel needed to complete the projects promptly are available.

VI. SUMMARY OF PROPOSAL CONTENTS

In summary of the minimum requirements, all proposal responses should include, but not be limited to, the following information:

A. A letter of introduction and interest to identify the firm.

B. A detailed summary of the firm's relative experience with references and contact information

C. Identification of all individuals who will be assigned by the firm to work on these projects to include a detailed summary of everyone's professional credentials and relevant experience. This should also include a summary of qualifications and relevant experience of all subcontractor personnel if applicable.

D. A detailed discussion of the project's approaches that indicates an understanding of the goals and requirements of the RFQ with specific reference as to how the firm would propose to accomplish the work items described.

E. Other information that the proposing firm may wish to include.

VII. SELECTION CRITERIA AND PROCESS

Proposals will be evaluated and reviewed by IPDC for final selection. This evaluation may include discussions with all or some of the firms responding to include interviews. Listed below are some of the criteria that may be used in the selection process.

A. Evaluation of the firm's ability to complete all requirements as specified in this RFQ.
B. Demonstrated experience with similar projects involving the public sector (local governments) of similar size and organization.
C. Demonstrated understanding of the projects and abilities of the firm to complete the expected scope of work on schedule and within budget.
D. Examination of how the firm will propose to accomplish project objectives.
E. The familiarity of the region and other factors determined to be relevant.
F. As previously stated, IPDC reserves the right to accept or reject any proposals and select that firm that is determined to best meet the needs of IPDC.

INSTRUCTIONS

1. Submit one (1) signed original and four (4) signed copies of the proposal.
2. Proposal requests received after the time advertised for the proposal opening will be void.
3. Address and mark the proposal as indicated in the notice.

CONDITIONS

1. IPDC reserves the right to accept or reject any or all proposals and to waive all technicalities.
2. IPDC reserves the right to make an award considered to be the most advantageous to IPDC.
3. All deliverables are the property of IPDC.
4. The successful proposing firm shall indemnify and save harmless IPDC and all IPDC officials, agents, and employees from all suits or claims of any character brought because of infringing on any patent, trademark, or copyright.

PROPOSAL

In compliance with the request for proposal, and subject to all conditions thereof, the undersigned offers and agrees to furnish any or all items proposed.

______________________ **Date**	______________________ **Authorized Signature**
______________________ **Company Name**	______________________ **Print or Type Name Above**
______________________ **Company Address**	______________________ **Company Fax**
______________________ **City, State, Zip**	
______________________ **Company Telephone Number**	
______________________ **Email Address**	

EDUCATION AND OUTREACH

INTRODUCTION

Education and outreach to landlords and tenants are valuable strategies that public housing agencies (PHAs) can use to recruit new Housing Choice Voucher (HCV) landlords and retain current landlords. PHAs can provide education and outreach in a variety of ways. Some strategies include hosting or attending events targeted to landlords or affordable housing providers. Education and outreach can also include activities like newsletters, presentations, briefings to community groups, one-on-one appointments, or other ways of sharing information or creating relationships between PHAs and landlords. PHAs can scale these activities up or down based on the staffing available to plan and facilitate the activities. PHAs can increase the number of activities when there is a strong need to recruit new landlords or implement other types of activities when they debut a new service, such as a landlord portal.

The following strategies are included in this section:

- New Landlord Orientation
- Landlord Outreach Events
- Expanding Your Network
- Tenant Education
- Information Sharing

Related strategies include:

- Landlord Focused Customer Service
- Technology
- Partnerships

The education and outreach strategies identified in this chapter address the following areas:

Education and Outreach Process Improvements

PHA Process Improvement	New Landlord Orientation	Landlord Outreach Events	Tenant Education	Expanding your Network	Information Sharing
Increase Recruitment	X	X		X	
Increase Retention	X	X	X	X	X
Improve Responsiveness	X	X		X	
Improve Tenant-Landlord Relationship			X		
Improve Inspections Process					X
Minimize Bureaucracy	X	X			X

The contents of this document, except when based on statutory or regulatory authority or law, do not have the force and effect of law and are not meant to bind the public in any way. This document is intended only to provide clarity to the public regarding existing requirements under the law or agency policies

EVENT PLANNING 101

Three of the education and outreach strategies are event-based: new landlord orientation, landlord outreach events, and tenant education. Since the broad planning steps required to carry out these events are largely the same, this section outlines general steps and tips for planning that can help make events successful.

Of course, events also have specific needs and requirements. A weekday orientation event includes some considerations that are different from those in an annual appreciation event, for instance. After the Event Planning 101 section, the Guidebook describes each of the event-based education and outreach strategies in detail, and provides additional recommendations unique to each strategy. Use this Event Planning 101 section together with the information provided in each education and outreach strategy to plan events.

EVENT FRAMEWORK: When planning an event of any type, it is important to first establish a clear objective and purpose by answering the questions **WHO, WHAT, HOW, WHY, WHERE** and **WHEN** the PHA is holding the event.

WHO, WHAT, HOW, WHY: During the framework planning, it is important to clearly identify **WHO** is the target audience, **WHY** the event is being held, **WHAT** information will be delivered or received, and **HOW** the event will be structured. By answering these questions, the PHA should have a better understanding of what the event will look like and how the PHA will meet event objectives.

It is important to answer these questions before beginning the planning process. The answers to these questions drive all of the subsequent planning. The PHA should revisit the framework throughout the planning process to ensure that the intent and focus of the event is still consistent. If the intent or focus has changed, evaluate, and adjust as needed.

EVENT FRAMEWORK	
WHO	Who is the target audience? Both landlords and tenants? Will the event be open to partner organizations and/or the general public? How many participants does the PHA anticipate? Who will present the information? PHA staff? A group panel? An outside moderator?
WHAT	What information will be presented?
HOW	How will the information be delivered? Is this a series or stand-alone event? Is the event lecture- or discussion-based?
WHY	Why is this event important? What is the objective? Is the goal to update participants who already know the basics or provide training on brand-new information?
WHERE	Where will the event take place?
WHEN	When will the event take place? What is the date and time? How often will this event be offered?

Now, PHAs can address **WHERE** and **WHEN** the event will take place.

WHERE: Location can have a direct impact on attendance levels. Locations should be in a central or convenient location and be in close proximity to parking or public transportation. If the event will take place during lunch hours, PHAs should consider a location that has restaurants within walking distance.

To keep costs down, consider using free or low-cost meeting space. Locations might include PHA conference rooms or PHA-partner meeting space, but PHAs should also look into public libraries and community or recreation centers. For occasional events with a much larger audience, the PHA might need to look at options such as conference spaces, like hotels or convention centers.

Things to consider: Does the selected location have enough space to accommodate the anticipated number of participants? Does it have the audio-visual (A/V) equipment needed for presentations and microphones, if needed?

Civil Rights Requirements: Physical Accessibility

All events including, outreach activities, training sessions and meetings must be held in facilities that are physically accessible to persons with disabilities. Where physical accessibility is not achievable, PHAs must give priority to alternative methods of product delivery that offer programs and activities to qualified individuals with disabilities in the most integrated setting appropriate in accordance with HUD's implementing regulations for section 504 of the Rehabilitation Act of 1973 (29 U.S.C.§ 794) at 24 CFR Part 8.

WHEN: The frequency and length depends on the nature and objectives of the event. Some types of events might be most effective by having multiple sessions on a set schedule. Other types of events might be better suited to be held on an annual basis. In the sections of this chapter that discuss individual strategies, there are recommendations for frequency based on the nature of the event.

Things to consider: Are certain times of the year or days of the week better than others? Will attending the event interfere with participants' jobs—should the event be held during or after business hours?

EVENT LOGISTICS

Establishing the framework helps the PHA establish the purpose and goals of the event. Logistics planning and implementation ensures the purpose and goals are met by executing a well-run event. After the event framework has been established, the PHA should begin executing the logistics planning and implementation.

Logistics planning and implementation do not always follow a linear process and some elements take place at the same time. A number of meeting planning activities involve confirming and re-confirming key elements of the event. For instance, the staff member in charge of the event asks an inspector to attend a meeting and discuss common inspection fail items. She agrees and is emailed the date, time, and location of the event. The PHA markets the event and landlords sign up, eager to get more information about the program. The staff member in charge of the event should plan to follow up with the inspector to make sure that the date is on her calendar and that she prepared for the event. Another good idea would be to request materials the inspector plans to use in order to make copies in time for the event.

Staffing

Most events can be planned by one person, but that person needs to be able to set aside time to plan and execute. A large event like a landlord symposium or landlord recognition event could require the assistance of additional staff.

STEP 1: CREATE A TIMELINE

Creating a realistic timeline with due dates is critical to success. When thinking about timeframes, keep the following in mind:

Tentative Date: The PHA should set a target date and time for the event based on the Where and When established in the framework. The PHA should allow for enough time to complete Steps 2 and 3. Note: The date and location is typically not firm at this stage. PHAs should consider waiting to market the event until Step 2.

If the date is flexible, estimate the amount of time required for each step and then set the date based on the timeline. This approach gives the PHA more flexibility in delivery.

However, if the date is firm, it is helpful to back into the timeline starting with the event date and then estimating the time needed for the previous step and so on. Adjust the due dates accordingly.

Larger events will require a longer planning process than smaller events. Sample timelines for large and small events are shown to the right.

Venue: The PHA should also have a list of alternates in mind if the preferred venue or presenter(s) is not available. Many PHAs have available space at their location. If the usual options for hosting group events are unavailable, PHAs should keep in mind what other alternate locations might be available to them at no or low cost.

Presenters: Presenters could include PHA staff or outside organizations.

Finalizing the location and presenters may involve some back-and-forth before a final date and location can be set. Remember if the date changes, adjust the timeline to match.

Materials: Revising and developing materials can be time-consuming especially new material development. The PHA should ensure that enough time is dedicated to developing or revising, formatting, and reproducing materials.

Effective Communication

PHAs must ensure that notices of and communications during all outreach events are provided in a manner that is effective for persons with hearing, visual, and other communications related disabilities consistent with section 504 of the Rehabilitation Act of 1973 (24 CFR 8.6), and as applicable the Americans with Disabilities Act. This includes ensuring that materials are in appropriate alternative formats is needed, e.g. Braille, audio, large type, sign language, interpreters, and assistive listening devices, per section 504 of the Rehabilitation Act of 1973 (24 CFR 8.6), and as applicable the Americans with Disabilities Act (ADA).

Furthermore, PHAs must take reasonable steps to ensure meaningful access to programs to persons with limited English proficiency (LEP), pursuant to Title VI of the Civil Rights Act of 1964 and Executive Order 13166. This may mean providing language assistance services to ensure meaningful resident and community involvement for persons with LEP as a result of their nationality. The Department published Final Guidance to Federal Financial Assistance Recipients Regarding Title VI Prohibition Against National Origin Discrimination Affecting Limited English Proficient Persons (72 Fed. Reg. 2732; January 22, 2007) to aid recipients of HUD assistance in identifying language assistance needs and developing language assistance plans.

Marketing: The PHA should aim to market the event 1-2 months prior to delivery. For larger events, at least 2 months is recommended.

TIP: The timelines provide deadlines and activities in an ideal world. If you don't have as much time as recommended, don't let that stop you. Rarely are event timelines perfect. The most important elements are to provide relevant and accurate information in a reasonable timeframe, and to provide an opportunity for landlords to engage directly with the PHA.

SAMPLE TIMELINE 1

Small event held at PHA.

90 Days Prior to Event

- Confirm venue and speakers
- Begin materials development

60-45 Days Prior to Event

- Begin marketing

14 Days Prior to Event

- Finalize materials

10 Days Prior to Event

- Confirm speakers and room availability
- Print materials

1 Day Prior to Event

- Set up room

Day of Event

- **Conduct Event**

5 Days After Event

- Evaluate

SAMPLE TIMELINE 2

Large event held at a community building.

120 Days Prior to Event

- Confirm venue and speakers
- Begin materials development

60-90 Days Prior to Event

- Begin marketing

21 Days Prior to Event

- Finalize materials

14 Days Prior to Event

- Confirm speakers and room availability
- Print materials

1-3 Days Prior to Event

- Set up room

Day of Event

- **Conduct Event**

5 Days After Event

- Evaluate

STEP 2: VENUE AND PRESENTERS

Once the PHA has established a timeline and set a tentative date, the PHA should begin contacting location options and possible presenters to understand their availability.

For events that cannot be accommodated in PHA properties or public partner spaces, the process for securing a space and making sure the space has the necessary amenities will require more time.

There are several ways to set up a meeting space. Some common set-ups are listed below.

Theatre-style: This set-up is typically used for lecture or presentation-based events. Attendees are seated in rows facing the speaker.

Crescent Rounds: Attendees are seated at round tables. To ensure that all attendees can view the speaker, only a portion of each table has chairs. This set-up is useful if attendees will network in a small group, take notes, or eat a meal.

Classroom Style: Attendees are seated in rows with long tables. This set-up is particularly useful if attendees will be taking notes.

STEP 3: MATERIALS, MARKETING, AND OTHER DETAILS

In the lead up to the event, some activities happen at the same time. There can be a lot of follow up. One way of tracking that tasks are completed when needed is to develop checklists.

Materials: The nature of the session and the information to be presented will often dictate what materials are needed. They might include PowerPoint presentations, marketing materials for landlords, or hard copies of handouts explaining program rules.

The PHA should develop an agenda for the event which should be made available on the PHA's website or as a component of the marketing materials. PHAs should ensure that materials are in appropriate alternative formats is needed, e.g. Braille, audio, large type, sign language, interpreters, and assistive listening devices per section 504 of the Rehabilitation Act of 1973 (24 CFR 8.6), and as applicable to ADA.

Market: To ensure that the event makes it on to the desired audience's calendar, aim to market events at least 1 to 2 months in advance. Marketing strategies could include advertising on the PHA's website or social media, reaching out to local apartment associations and other community partners with similar missions and goals (minimal cost) or placing ads (higher cost). Flyers for the event can be included as part of any newsletters or other materials that the PHA already sends to landlords such as monthly remittances or checks to landlords. If PHA staff hold meetings or attend meetings, they can hand out flyers there. If the PHA uses social media, PHAs might post about the event more than once. The marketing materials should include the subject, target audience, date, location, time, and registration information, if applicable. The PHA should consider including information on transportation options, including parking, the agenda and speakers, and any other relevant information.

Before expending any money, PHAs will want to thoroughly review allowability under Federal regulations. PHAs may use administrative fees and administrative fee reserves to cover the cost of materials and marketing for events directly related to administration of the voucher program per 24 CFR §§ 982.152, 982.155. (For further guidance on the allowable use of administrative fee reserves for such outreach and education purposes, PHAs can refer to PIH Notice 2015-17.)

NOTE: PHAs should consider maintaining a landlord email list.

On-going Logistics Support: Throughout the planning process, the PHA will need to provide on-going support and monitor progress. The PHA should:

- Confirm A/V needs and equipment,

including any special requirements for persons with disabilities

- Confirm details with presenters and venue
- Be available to answer questions from participants
- Provide on-going marketing
- Print materials

STEP 4: CONDUCT EVENT

Depending on the size and nature of the event, PHA staff should arrive early to set up. Setup may include include organizing and staffing a registration table, distributing materials and handouts, greeting participants and presenters, and setting up A/V and tables and chairs.

Whether there is a formal registration table or not, have a sign-in sheet like the attached sample (see Appendix D1-Sample sign-in sheet). All participants should be encouraged to provide contact information or business cards so the PHA can conduct follow-up efforts. If the PHA has enough staff on-hand, the PHA can sign-in participants using an Excel spreadsheet to ensure accuracy and completeness. If the participant is filling out contact information on a form, the form needs to have enough space to allow for neat handwriting. The PHA cannot follow up if phone number or email address are not legible.

The PHA should collect information that fits with how the PHA plans to follow up with the participant. For example, in a session that seeks to recruit new landlords, will the PHA send out a follow-up mailing? If not, the PHA may not need to request addresses on the sign-in sheet. Contact information typically includes: company name and title, phone number, email address, and address.

STEP 5: EVALUATION

One of the most important components of an event is evaluating its effectiveness. There are multiple ways the PHA can gauge how successful the event was in meeting the goals they set out in their framework. These include:

Attendance: PHAs can measure the level of attendance immediately during the event by observation and after the event by reviewing the sign-in list.

During the event, the evaluation can be conducted by asking for a show of hands "How many in the room are landlords who have rented to HCV tenants? How many would like to see a speaker on landlord-tenant law?" This relies on participants' willingness to comment and the host's ability to quickly count hands and judge the response. Although this exercise may not gather much information, it will help the PHA quickly understand the composition of their audience. The PHA staff might also ask a few participants after the meeting if they felt that the goals had been met or what they'd like to see at future meetings.

After the event, the PHA can analyze the sign-in list to evaluate whether the target audience attended the meeting.

These attendance indicators can, over time, give the PHA an idea of how often to hold similar meetings, where to hold the meetings, and what content is most relevant for the target audience.

Evaluation Forms: PHAs can request participants complete formal evaluations, which should be no more than a page in length and offer some check-off questions. These questions might include

- Was this meeting too short, too long, or the right length?
- Did the meeting provide the information the landlord was looking for?
- Did attending this meeting positively impact the landlord's willingness to rent to HCV holders?

The PHA should provide options for some open-ended comments, as well.

Direct Outreach from Participants: The PHA staff could also call participants after the meeting to ask their opinion on how the event went. The PHA staff that attended the event could debrief what went well at the event and what may need to be improved for a future event.

Data: The effectiveness of an event can also be measured through data that may become available over time. For example, the PHA may want to see if the number of landlords renting to HCV families has increased or if more landlords are marketing units to HCV tenants after the event.

Key to hosting successful events

Evaluate attendance trends and feedback from participants.

RESOURCES

Appendix D1-Sample sign-in sheet.

STRATEGY: NEW LANDLORD ORIENTATION

Providing new or potential landlords with information on how to participate in the HCV program. The goal of this strategy is to provide education on the HCV program ensuring, landlords have a thorough understanding of and feel comfortable with the HCV process.

Who: **All PHAs regardless of size and/or location.**

Cost: **$** $$ $$$

Implementation Considerations: ○ FEW ● **MEDIUM** ○ DIFFICULT

New Landlord Orientation PHA Process Improvements

PHA Process Improvement	New Landlord Orientation
Increase Recruitment	X
Increase Retention	X
Improve Responsiveness	X
Improve Tenant-Landlord Relationship	
Improve Inspections Process	
Minimize Bureaucracy	X

WHAT THIS IS AND WHY IT WORKS: New landlord orientation consists of PHA-hosted informational workshops, for new or potential HCV landlords.

Participants at orientation workshops have already expressed interest in the program as evidenced by their attendance. Therefore, this is a prime opportunity for PHAs to further encourage participation by laying out clear expectations, highlighting program benefits for landlords, countering misperceptions, and demonstrating an investment in a productive landlord-PHA relationship.

As noted in the chart, new landlord orientations have the potential to improve multiple aspects of the HCV process.

Orientation Workshops

Landlords who attend orientation workshops are noted to have fewer errors in their paperwork (HCV focus group sessions). An orientation is a good way to answer lingering questions about paperwork and policies.

Related Strategies:

- Landlord Outreach Events
- Landlord Focused Customer Service

IMPLEMENTATION

As noted in the Education and Outreach Introduction (see Event Planning 101), the new landlord orientation strategy is event-based. On the following page are specific suggestions and recommendations on how to plan a new landlord orientation event.

EVENT FRAMEWORK	
WHO IS THE TARGET AUDIENCE? **WHO WILL PRESENT?**	**Target Audience:** The target audience for landlord orientations are new or prospective landlords. **Presenters:** For the PHA, staff in attendance might include the primary HCV contact for landlords (such as the landlord liaison, the HCV director, or senior case manager) and inspections staff. Consider having someone who is familiar not only with the HCV program, but the PHA as a whole. The presenters should be prepared to answer questions on a range of HCV and PHA topics. First impressions are important! This may be one of the first interactions a landlord will have with PHA staff. The involvement of key staff, in addition to PHA management, shows a commitment to improving PHA-landlord relationships and can set the tone for future encounters.
WHAT WILL BE PRESENTED?	An orientation that covers the HCV program from A to Z provides new landlords with an understanding of the overall process and an accurate expectation of what the program, tenants, PHAs, and themselves can and cannot do. Standard topics might include: • Overview of the PHA and HUD • HCV Program Overview • Benefits for Landlords • Landlord Roles and Responsibilities • Rent Determination and Payment Process • Request for Tenancy Approval and Specific Application Paperwork for Landlords • Tenant Screening • Housing Assistance Payments (HAP) Contract Overview • Inspections • Questions and Answers (Q&A) Orientations should allow plenty of time for Q&A and networking. Allowing time for landlords to ask questions and receive information can be a particularly critical strategy to both combat misinformation about the HCV program as well as to gather feedback on how the PHA can better serve landlords. When determining what information will be presented, PHAs should remember that some landlords may be coming to the orientation with no knowledge of HUD, PHAs, or the HCV program. Be sure to spell out common abbreviations and offer short, clear descriptions of practices like accessing the landlord portal or having a Housing Quality Standards (HQS) inspection.

EVENT FRAMEWORK	
HOW WILL THE INFORMATION BE DELIVERED?	A new landlord orientation is typically presented in a lecture-style format, lasting approximately 2-3 hours in length. Some PHAs also have presenters from multiple departments present on different topics. A PowerPoint presentation and an agenda will help the PHA and speakers organize time and maintain momentum, cover needed topics, and include time for questions. PHAs may also want to provide handouts to help participants understand the topics being presented.
WHY IS THIS IMPORTANT?	New landlord orientations have the immediate goal of providing new and prospective landlords with the information that will help them be successful in program participation. Orientation can set the stage for successful program participation and a positive PHA-landlord relationship.
WHERE WILL THE EVENT TAKE PLACE?	Orientations are typically low-key events that do not have extensive A/V or set-up needs. Presentation requirements for this type of event would typically be an LCD projector, screen, and laptop for visual; and a podium and theatre-style seating. Speakers and microphones may be necessary if the event includes playing a video or requesting input from a large group of participants. PHAs might find that their anticipated attendance numbers allow them to host the orientations in PHA meeting space. Public libraries or other local government or community facilities might also have space that meets the A/V and set-up requirements.
WHEN WILL THE EVENTS TAKE PLACE?	The frequency of meetings will vary based on the need to recruit more landlords for the program or the level of interest from new landlords in attending an orientation. The PHA should look at the numbers of new landlords on the program, as well as the interest they have received in the program to help determine how often to hold orientations. PHAs in larger service areas with a higher number of new and interested landlords may host multiple meetings throughout the month. PHAs with smaller service areas or smaller voucher programs, may find that monthly or quarterly meetings are sufficient. Offering orientation workshops on the same day each month may help staff remember to inform potential landlords and also will help landlords plan to attend. For example, the PHA may decide that a landlord orientation workshop will be held the last Thursday of every month. Offering Saturday or evening sessions periodically might also be valuable, particularly for landlords with smaller portfolios who may work other full-time jobs. When first implementing this strategy, the PHA may consider offering quarterly orientations and evaluating the frequency and content of the orientation after the first one or two orientations.

If the PHA finds that current and experienced HCV landlords are significantly represented in new landlord orientation meetings, the PHA may consider finding out what current landlords are getting or hoping to get from these sessions. Is this the only way they think they can communicate directly with PHA staff? Is this meeting their primary means of networking with other landlords? The presence of seasoned landlords could be a positive – providing them a refresher on the HCV program and an opportunity to discuss their experiences with the HCV program with prospective landlords. If the PHA notices that many orientation participants are current HCV landlords, the PHA might consider hosting separate meetings for existing landlords to meet their unmet needs, which is discussed further in the Landlord Outreach Workshops Strategy section. The PHA could also consider adding additional topics such as recent changes to the state or city building code that would be of interest and helpful to current landlords.

SET THE TONE!

This may be one of the first times landlords have heard directly from PHAs about the program. PHAs should use this opportunity to spread positive messages about the program and provide information on issues that have historically caused confusion.

- The role of the landlord, tenant, and PHA
- The relationship between the HAP contract and the owner lease
- PHA and landlord screening
- Fair Housing Rights and Responsibility of a Landlord
- Benefits of the HCV program including guaranteed rent, assistance from the PHA in marketing vacant units, assistance ensuring property is well-maintained, and offering families affordable housing

EVENT LOGISTICS

Some specifics related to new landlord orientations are noted below. For additional information on event logistics, see Event Planning 101.

TIMELINE

The sample timeline for smaller events held at the PHA included in the Education and Outreach Introduction section can be used as base for orientations since these events are typically smaller in scale and scope.

VENUE AND PRESENTERS

Due to their size and scope, orientations are good events to hold at the PHA and to use PHA staff to conduct the orientation. This will reduce not only the planning and implementation time, but significantly reduce potential costs.

MATERIALS, MARKETING, AND OTHER DETAILS

The majority of the orientation will be lecture-based. Suggested materials include a PowerPoint presentation and a landlord handbook produced by the PHA. The PHA will need to ensure that there is a way to project the presentation and have printed handbooks available. Additional materials could include an agenda and list of PHA contacts. Avoid reinventing the wheel: sample materials including PowerPoint presentation, agenda, and a landlord handbook, are coming soon from HUD!

TIP: "Is that really all there is?" Consider bringing a sample packet of forms the landlord is likely to encounter when they participate in the program. Landlords might be surprised at how little paperwork needs to be completed. **Sample PHA forms can be found at:** *https://www.hud.gov/program_offices/public_indian_housing/programs/hcv/landlord/forms*

Scale it Down!

PHAs that do not offer regular orientations might instead create an orientation packet or offer individual appointments for interested landlords. PHAs might even record a landlord orientation and post in on YouTube to maximize accessibility.

Market: Often PHAs market orientations to landlords who contact the PHA with inquiries. Other minimal cost marketing strategies include advertising on the PHA's website or social media, passing out flyers at outreach or other events, and reaching out to local apartment associations. PHAs might place ads, at a higher cost. The PHA might also include notices about upcoming events in their regular communications with landlords, like in monthly HAP remittances.

Marketing materials should also include information about parking and/or transportation options.

Evaluate: Keep track of attendance at orientation workshops – how many attended? How many units do they own? Do they become landlords with the PHA? Are they already landlords with the PHA? Where are their properties located?

REMINDER: If during the framework discussion, see Education and Outreach Introduction, the PHA chooses to hold orientations in outside locations, the PHA should ensure that it has time to seek, negotiate for, or sign contracts with free or low-cost settings like school auditoriums, libraries, community center meeting rooms or partner organizations' meeting rooms. If it pursues a location with a cost, the PHA should ensure that it has a clear understanding what funds are eligible for paying for meeting space under what conditions. To enter into an agreement with a venue that involves a cost, the PHA must follow its procurement policy, local law, and 24 CFR Part 200, which require sourcing multiple venues. The PHA may use administrative fees and administrative fee reserves to cover the cost of a venue for events directly related to administration of the voucher program per 24 CFR §§ 982.152, 982.155. See PIH Notice 2015-17.

Not only does evaluating data trends and gathering feedback from landlords guide a PHA on adjusting the frequency and location of workshops, it may also identify trends in landlord participation. This information might be useful for PHA Board members and other departments as well.

RESOURCES

Appendix D1-Sample sign-in sheet

Sample HCV Landlord Forms: *https://www.hud.gov/program_offices/public_indian_housing/programs/hcv/landlord/forms*

REGULATIONS

Procurement: 24 CFR Part 200

Administrative Fee: 24 CFR §§ 982.152, 982.155. See PIH Notice 2015-17.

STRATEGY: LANDLORD OUTREACH EVENTS

Providing information to current landlords and recruiting new landlords. The goal of this strategy is to encourage information sharing between current and potential landlords and the PHA.

Who: **All PHAs regardless of size and/or location.**

Cost: **$ $$** $$$

Implementation Considerations: ● **LOW** ○ MEDIUM ○ DIFFICULT

Landlord Outreach Events PHA Process Improvements

PHA Process Improvement	Landlord Outreach Events
Increase Recruitment	X
Increase Retention	X
Improve Responsiveness	X
Improve Tenant-Landlord Relationship	
Improve Inspections Process	
Minimize Bureaucracy	X

WHAT THIS IS AND WHY IT WORKS: PHA-hosted landlord outreach events engage with and educate the landlord community. Unlike new landlord orientations, which are targeted at providing new or prospective landlords with information needed to join the program, landlord outreach events can draw a varied audience and address a multitude of topics. They have the potential to both attract new landlords and increase the satisfaction of current landlords.

Goals for these events include:

- Listening to issues and concerns: Landlords have expressed that they want PHAs to consider them valued partners. They also would like greater ability to connect with PHA staff when questions or issues arise. An opportunity to interact with PHA staff, ask questions, and receive answers, can go a long way to bridge the perceived information gap. If the PHA has added documents or tweaked processes in response to landlord concerns, this is an opportunity to let landlords know how the PHA responded to the landlord comments. It also provides the PHA with valuable insight on frustrations and issues with the HCV program which could be contributing to lower participation.
- Providing information about new programmatic or legal changes that will affect HCV landlords: Being current on programmatic changes can alleviate the fear of the unknown when new programmatic changes take effect. This can include both changes from federal (i.e. HUD), state, county, or local enforcing agencies. For example, if a city has recently changed to source of income (SOI) laws, this is a change where myth-busting and sharing information could be especially helpful to landlords.

- Building and strengthening partnerships between the PHA, landlords, and other entities and resources: Networking can create a support system among stakeholders and provide information on untapped resources that can assist landlords, tenants, and the PHA.

POTENTIAL PHA PARTNERS

The below list provides partner organization types that the PHA could invite to participate in outreach events as participants, speakers, or vendors.

- Local non-profit organizations
- Local foundations
- Utility companies that offer energy upgrade rebates or weatherization
- Inspection companies
- Home security companies
- Banks
- City or county organizations with an interest in landlords or tenants such as building codes departments
- Housing developers
- Landlord associations

- Recruiting new landlords to participate in the HCV program: Outreach events demonstrate a commitment by the PHA to making landlords valued partners. The New Landlord Orientation strategy provides information for building a strong foundation and relationship with the new landlord from the beginning. This landlord outreach strategy demonstrates a commitment by the PHA to continue to engage with landlords, hear their concerns, and work with them as valued partners. In addition, outreach events that focus on topics that interest all landlords may draw non-participating landlords, who did not have a prior interest in the HCV program. These events provide an opportunity for them to learn about the benefits of the HCV program, and other rental housing management related resources in the community.

Related Strategies:

- New Landlord Orientation
- Expanding Your Network
- Landlord Focused Customer Service
- Partnerships

IMPLEMENTATION CONSIDERATIONS

Just as this strategy can meet a number of goals, it can take shape as a number of different events. These have a variety of framework and logistic needs. The event framework on the following pages can be applied to most outreach events. See also Event Planning 101.

FRAMEWORK: OUTREACH EVENTS	
WHO IS THE TARGET AUDIENCE? **WHO WILL PRESENT?**	**Target Audience:** The target audience for landlord outreach events is current and prospective HCV landlords. **Presenters:** Outreach events focused on education of landlords will want to bring in expert presenters in topics of interest to landlords. See the Potential PHA Partners graphic for ideas. Events that are focused on supporting current landlords through informing, listening, and enhancing the relationship between landlords and the PHA would also benefit from a strong PHA staff presence.
WHAT WILL BE PRESENTED?	Outreach events are a great way to address challenges faced by current HCV landlords and to connect with new landlords. The topics below are broken into categories by audience. • Current HCV Landlords: Current HCV landlords may have specific challenges, or require different information, than prospective landlords. PHAs should consider asking landlords what information they would like to see on an agenda. PHA staff may also have heard of common issues or trends. Topics may include: common inspections fails, regulatory changes, payment abatement policies, procedure for requesting rent increases, enforcing tenant obligations, and explanation of Small Area Fair Market Rents (SAFMR), if applicable. • Current and Non-HCV Landlords: By offering seminars on topics that are helpful to the landlord community, regardless of their HCV participation status, outreach events can connect with those landlords who might not attend an "HCV-only" event. Topics might include presentations from legal aid and/or the sheriff's department on evictions, the difference between service, assistance and emotional support animals, new housing regulations that would affect all landlords, presentations from city or county departments, and the county tax assessor's office. **TIP:** The PHA might want to consider including a brief overview of the HCV program and have information on how to participate in the program available to those landlords who become interested in the program. The PHA may also want to have a list of the local PHAs and their contact information. Landlords with small portfolios and corporate landlords may have different interests and needs. PHAs should try to tailor their outreach events to consider the needs of different types of landlords in their community.

FRAMEWORK: OUTREACH EVENTS	
HOW WILL THE INFORMATION BE DELIVERED?	Some PHAs plan outreach events as formal workshops, social or networking events, or annual recognition events. PHAs may want to mix-and-match topics and formats based on their target audience, needs, and financial constraints. PHAs should also consider having multiple types of outreach events to meet multiple needs and goals. Some variations discussed in detail below are: • Brown Bag Lunch and Learn • Annual Appreciation Event and Social Hour • Listening Session
WHY IS THIS IMPORTANT?	These events support current landlords as valued PHA partners. They can also attract potential landlords, who had not known about or considered working with the PHA.
WHERE WILL THE EVENT TAKE PLACE?	Outreach events can vary greatly in size and complexity. Suggestions for locations are noted below in the discussion of individual variations. As with all events, PHAs should consider utilizing free space such as PHA meeting space, partner organizations, and community buildings. For larger events such as an annual appreciation event, if no other adequate space is large enough, PHAs may want to consider renting meeting space. If the PHA rents space or amenities with a cost, the PHA should ensure that it has a clear understanding of what funds are eligible for paying for costs, and under what conditions.

REMINDER: It is important to note that if the PHA makes use of space or amenities with a cost, the PHA should ensure that it has a clear understanding of what funds are eligible for paying for costs, and under what conditions. The PHA must follow its procurement policy, local law, and 24 CFR Part 200 (this may include sourcing multiple venues). The PHA may use administrative fees and administrative fee reserves to cover the cost of a venue for events directly related to administration of the voucher program per 24 CFR §§ 982.152, 982.155. See PIH Notice 2015-17.a cost, the PHA must follow its procurement policy, local law, and 24 CFR Part 200, which require sourcing multiple venues. The PHA may use administrative fees and administrative fee reserves to cover the cost of a venue for events directly related to administration of the voucher program per 24 CFR §§ 982.152, 982.155. See PIH Notice 2015-17.

Advisory Boards

Get feedback directly from landlords! A large PHA in the Midwest has an owner advisory board that provides feedback on landlord issues and the HCV program. This feedback guides the PHA's agenda for landlord workshops. Originally, all current HCV landlords were invited to participate during the landlord workshops. The group has remained the same for the past few years and, as people leave, they will have an open invitation at landlord workshops, and replace with new members. Currently there are about seven landlords that represent multiple properties. The group meets twice per year during the week. An advisory board may be appropriate for most PHAs, regardless of size.

Variations: While the WHO, WHAT, WHY for outreach events remain similar, the HOW, WHERE, WHEN vary based on the type of event. Below are three different variations on how a PHA might conduct outreach events.

BROWN BAG LUNCH AND LEARN	
HOW WILL THE INFORMATION BE DELIVERED?	Lunch and Learn events provide 1-2-hour daytime opportunities for PHAs to share information with, and receive feedback from, landlords. Lunch and learn events take place over lunch hours with participants bringing their own lunch. These events are typically less formal than a seminar or workshop. The format might be a mix of formal presentation, information dissemination, Q&A, and open discussion.
WHERE WILL THE EVENT TAKE PLACE?	Lunch and Learn events can take place in a variety of locations as the A/V needs are typically very minimal due to the informal nature. The PHA should note that attendees will be eating lunch. Room set-up could be in classroom-style or crescent rounds, both of which include tables. PHAs may want to consider whether the event location is close to restaurants where participants can get take-out lunches to bring to the lunch and learn.
WHEN WILL THE EVENTS TAKE PLACE?	Available resources and interest may dictate the frequency of these events. Additionally, landlords in a particular area might not be able to attend events frequently during business hours. If there appears to be substantial interest in the landlord community, the PHA may benefit from hosting a lunch and learn on a routine basis, monthly, bimonthly or quarterly for example. Offering these informal events on a schedule may increase participation and interest if landlords experience the value of the sessions and start putting these events as a standing appointment on their calendars.
ADDITIONAL NOTES	Marketing materials should make it clear that participants should bring their own lunch. Marketing materials need to be clear about what will be available for participants since the event will be held during lunch time.

Vendors

Having outside groups or organizations attend meetings benefits current HCV landlords and also has the potential to draw in prospective landlords.

ANNUAL APPRECIATION EVENT AND SOCIAL HOUR	
HOW WILL THE INFORMATION BE DELIVERED?	Annual appreciation events bring landlords together in a more formal or celebratory setting to network, honor accomplishment, provide awards, and appreciate contributions. Although they are not primarily intended to be an educational event, having a keynote speaker for an awards ceremony could be appropriate. Similarly, landlord social hours focus on networking and social activities. They may be less resource-intensive to plan and the PHA may benefit from partnering with various organizations to implement the social hours. Social hours may attract non-participating HCV landlords – raising awareness about the program.
WHERE WILL THE EVENT TAKE PLACE?	To encourage a light-hearted networking atmosphere, these events should take place in more comfortable spaces. These spaces may be available at a PHA-property community room, a nicely finished public space, or at a rented space.

ANNUAL APPRECIATION EVENT AND SOCIAL HOUR	
WHEN WILL THE EVENTS TAKE PLACE?	Because of the possible cost and time investment to plan an appreciation event, it is likely to be annual or occur every other year. Since social hours are less formal, it may be appropriate to partner with a food/beverage establishment for the event, and let landlords know food/beverage will be available for purchase. With this format, a social hour could take place as often as the PHA would like to arrange it. Setting a regular schedule and/or recurring day my help boost attendance, with participants being more likely to remember the time and date of the event.
ADDITIONAL NOTES	PHAs may want to engage local funders or partners to see if they will sponsor an annual appreciation event, a dinner for example, or a social hour. Prior to engaging local partners, PHAs should review their gift and conflict of interest policies for any potential conflicts.

LISTENING SESSION	
HOW WILL THE INFORMATION BE DELIVERED?	Hosting a landlord listening session can seem daunting for PHA staff. However, several PHAs have noted that listening sessions provide landlords with the opportunity to share valuable feedback to the PHA which can, ultimately, increase landlord satisfaction with the program. Although listening sessions have the potential to discourage new landlords who hear complaints aired at the session, the information sharing and willingness of the PHA to hear critical feedback may be more impactful and longer lasting than the negative feedback. Engaging a moderator or facilitator can decrease PHA staff stress by having a neutral party that can also help keep the meeting on task and on time. Assigning someone from the PHA staff, such as a case worker, to record issues and suggestions may be useful. It might also be helpful to have other case workers on hand who can resolve specific landlord issues after the session. For example, if a landlord complains she hasn't heard whether her unit passed inspection, a case worker could answer that question before the landlord leaves after the listening session. Use of an agenda or series of guided questions might also serve to keep conversation moving. Conversation might begin with PHA on HCV process improvements or updates, setting a positive tone for the session. The session could then move through a series of questions: What do you like about the program? What is not going so well? What changes would you recommend? Letting participants know up front that there will be time dedicated to discuss each of the topics on the agenda keeps conversation on track and in the appropriate vein. PHAs should also be prepared to provide information and facts to counter any misperceptions about the program. **TIP:** Stick with it! One PHA noted that when they first began holding landlord outreach events, the meetings were complaint sessions, especially about the inspections process. The PHA listened to the feedback, made changes to address concerns, where appropriate, and saw the inspections process dramatically improve. According to the PHA, over time, sessions have become more constructive and are no longer contentious. Landlords who attend say "they are learning something new" at every meeting.

LISTENING SESSION	
WHERE WILL THE EVENT TAKE PLACE?	A listening session is most likely to take place at the PHA or a landlord industry group space.
WHEN WILL THE EVENTS TAKE PLACE?	A listening session could be a one-time event or occur regularly. This may depend on what topics are motivating the PHA-landlord community to meet and the goals set by the PHA. Something to be cautious of is that landlords will expect the PHA to take some action based on the feedback provided in the listening sessions. In order to give PHAs time to address some of the concerns, the PHA may choose not to host listening sessions more than once or twice per year.
LOGISTICS NOTES	To support a constructive tone in a listening session, set a clear goal and establish ground rules for contributing.

MARKETING STRATEGY: CAST A WIDE NET!

When a small PHA in the Southwest planned their first landlord seminar, similar to a landlord recruitment event, they took a multi-pronged approach to bringing new landlords to the event. The PHA sent a marketing invitation to their full email contact list, but they also relied on a hands-on, personal approach. Staff was encouraged to personally invite as many landlords as possible. For example, staff would stop at complexes they drove by on their way home and let property managers know about this event open to landlords who were not currently partnered with the PHA. One PHA inspector invited landlords he met during the course of his day. The event speakers appealed to a broad base of landlords, discussing changes resulting from the State Landlord Tenant Act, compliant eviction process, service animals, and ADA compliance for landlords. They also had vendors such as animal control and a group that works with multi-family rental housing. Five regional housing authorities answered questions. The mayor attended, raising the profile of the event. The event brought in 150 participants including 90 landlords.

TIP: Start simple! Host a small landlord outreach workshop and use it to gauge the level of interest and types of events that would be most beneficial.

RESOURCES

Appendix D1-Sample sign-in sheet

Resource for program updates and potential topics: *https://www.hud.gov/program_offices/public_indian_housing/post/announce*

REGULATIONS

Procurement: 24 CFR Part 200

Administrative Fee: 24 CFR §§ 982.152, 982.155. See PIH Notice 2015-17.

STRATEGY: TENANT EDUCATION

The goal of this education strategy is to provide current or future voucher holders with information and training on basics of the HCV program and tenant rights and responsibilities.

Who: All PHAs regardless of size and/or location.

Cost: $ $$ $$$

Implementation Considerations: ● **LOW** ○ MEDIUM ○ DIFFICULT

Tenant Education PHA Process Improvements

PHA Process Improvement	Tenant Education
Increase Recruitment	
Increase Retention	X
Improve Responsiveness	
Improve Tenant-Landlord Relationship	X
Improve Inspections Process	
Minimize Bureaucracy	

WHAT THIS IS AND WHY IT WORKS: Tenant education does not directly involve landlords. Landlords across the country have expressed interest, however, in having PHAs provide tenant education in an effort to improve the landlord-tenant relationship.

IMPLEMENTATION

As noted in the Education and Outreach Introduction (see Event Planning 101), this strategy is event-based. Below are specific suggestions and recommendations on how to plan a tenant education event.

EVENT FRAMEWORK	
WHO IS THE TARGET AUDIENCE? **WHO WILL PRESENT?**	**Target Audience:** The target audience are potential or current voucher holders. **Presenters:** For the PHA, staff in attendance might include case workers and the primary HCV contact. Additionally, it might be helpful to have speakers who can lend insight to the agenda topics.

<table>
<tr><th colspan="2">EVENT FRAMEWORK</th></tr>
<tr><td>WHAT WILL BE PRESENTED?</td><td>Current tenants may have different agenda needs than prospective tenants; however, a range of standard topics include:
• Overview of HCV program
• How to search for units
• How to complete rental applications and what landlords look for
  » Guest speaker opportunity: property owner or manager
• How to improve credit scores
• Tenant and landlord rights
  » Guest speaker opportunity: legal aid
• Common unit preventive maintenance and when to contact the landlord or request inspections
  » Guest speaker opportunity: housing inspector
• Renter's insurance 101
• The tenancy addendum alongside a sample lease
• How to be a good neighbor
• Tips for getting to know a new neighborhood</td></tr>
<tr><td>HOW WILL THE INFORMATION BE DELIVERED?</td><td>Tenant education would typically be presented in a lecture-style format, approximately 2-3 hours in length.

A PowerPoint presentation and an agenda will help the PHA and speakers organize time and maintain momentum, cover needed topics, and include time for questions. What handouts do participants need to understand the topics?</td></tr>
<tr><td>WHY IS THIS IMPORTANT?</td><td>Tenant education can set the stage for a successful relationship between tenants, landlords, and the PHA.</td></tr>
<tr><td>WHERE WILL THE EVENT TAKE PLACE?</td><td>Tenant education is typically low-key and does not have extensive or high-tech A/V or set-up needs. Presentation requirements for this type of event would typically be an LCD projector, screen, and laptop for visual; and a podium and theatre-style seating. Speakers and microphones may be necessary if the event includes playing a video or requesting input from a large group of participants.

PHAs might find that their anticipated attendance numbers allow them to host the workshops in the PHA's office meeting space. Public libraries or other local government or community facilities might also have space that meets the A/V and set-up requirements.

Some PHAs offer tenant education at several locations throughout their service area, others choose to utilize the same space.</td></tr>
</table>

EVENT FRAMEWORK	
WHEN WILL THE EVENTS TAKE PLACE?	The PHA should look at the numbers of voucher holders, as well as those on the waitlist. Providing training in advance can make the tenant-landlord relationship start off well prior to move-in. Two variations are below: • **Program Overview:** Some PHAs choose to incorporate tenant education in the HCV process. PHAs could encourage tenants to attend a training to help them navigate the HCV program. These sessions might last 3 hours and would provide more high-level information than a course in which the tenant would receive a certificate. • **Trainings on How to Be a Good Tenant:** These courses are voluntary and can result in the voucher holder receiving a certificate of completion which they can present to a landlord during the housing search and application process. **TIP:** Letting landlords know that the PHA offers tenant education can motivate both tenants and landlords. Landlords can feel reassured to know this training exists. Tenants may have increased motivation for completing the training if they know landlords will be looking for it. Offering trainings on the same day each month may help staff remember to inform tenants and also will help tenants know when they can attend. For example, workshops will be held on the last Thursday of every month. See Appendix D2-Sample Tenant Training Certificate

IMPLEMENTATION CONSIDERATIONS AND EVENT LOGISTICS

Although, tenant education trainings have similar implementation considerations and steps as new landlord orientations, PHAs may find it challenging to implement tenant education due to limited resources and competing events. PHAs may want to consider whether in-person training or online trainings better suit the needs of the PHA and its tenants. Regardless of the approach, the PHA should determine if the PHA will issue certificates of completion.

In-Person Training

- Prepare Materials: Materials might include a PowerPoint presentation, tenant FAQs, and resource lists. Keep in mind that participants will have a variety of educational backgrounds and experiences.

Partner!

Tenant trainings may be offered by partner organizations in your region. PHAs should reach out to local government agencies and non-profits that might be providing this service.

- Identify presenter(s): Consider having someone present who is familiar not only with the HCV program, but with the PHA as a whole. Other presenters might include landlords, legal aid, and the local fair housing organization.
- Determine the initial frequency and timing of training: quarterly trainings might be a good place to start to evaluate tenant interest.

- Identify and secure a location: Locations will also depend heavily on the availability of resources and the geographic service area. There may be options for free meeting space either at the PHA, partner locations, or public buildings. The availability of parking or public transportation is another factor to consider.
- Market: Marketing strategies could include advertising on the PHA's website and social media. The simplest marketing might be to include a message about the training in a mailing already scheduled to be sent to voucher holders.
- Evaluate: Feedback should be an important factor in determining the frequency, location, and content for trainings. These factors may change periodically.
- Sign-in sheets could include name, contact information, and a way for the participant to request additional information or follow-up.

On-line Workshops

- Identify content that may be conducive to online workshops. Consider where and how the training will be made available. Options include posting on the PHA's website or through a web-application
- Prepare materials: Materials might include PowerPoint presentations, tenant FAQs and resource lists. Partners: PHAs should reach out to other state and local agencies who might have online learning platforms that the PHA could utilize at little to no cost.
- Determine the on-line format for the training: PHAs should investigate different means of delivering the training. Options include webinars and on-line training applications.
- Certificates: Issuing certificates for on-line training is more challenging than for in-person trainings. The PHA must decide how completion of the training will be determined. Will the tenant self-certify? Take a quiz? Will completion be monitored through a web-application? This may inform the remaining decisions on how the training will be offered.

TIPS

Level of Commitment

Be mindful of time! When developing materials, the PHA should carefully consider tenant and PHA time commitments. PHAs that offer tenant education opportunities noted that their programs had difficulty when the time commitment for participants was too great. For example, one PHA noted that their program was too time intensive and consisted of multiple sessions taking more than 20 hours to complete in order to receive a certificate of completion. This proved to be too much of a time commitment and the program was ultimately not successful.

Another PHA with a multi-part training series, aware of the time constraints of attendees, worked to gain partners that would also host trainings. Thus, tenants could select from multiple times and locations to attend each segment.

Partners

PHAs should look to partner with other agencies and non-profits that might be interested in providing tenant training. PHAs should identify barriers that might prevent attendance. For example, childcare or assistance with transportation costs might make it easier for tenants to attend.

RESOURCES

Appendix D2-Sample Tenant Training Certificate

REGULATIONS

24 CFR § 982.301
https://www.ecfr.gov/cgi-bin/text-idx?SID=e9976589e4698eb05cbe1b7faec0b63a&mc=true&node=se24.4.982_1301&rgn=div8

STRATEGY: EXPANDING YOUR NETWORK

Reaching beyond HCV-centered events to find opportunities to provide outreach to current HCV landlords and recruit new landlords.

Who: **All PHAs regardless of size and/or location.**

Cost: **$ $$** $$$

Implementation Considerations: ● **LOW** ○ MEDIUM ○ DIFFICULT

Expanding Your Network PHA Process Improvements

PHA Process Improvement	Expanding Your Network
Increase Recruitment	X
Increase Retention	X
Improve Responsiveness	X
Improve Tenant-Landlord Relationship	
Improve Inspections Process	
Minimize Bureaucracy	

WHAT THIS IS AND WHY IT WORKS: PHAs can participate in a range of activities to recruit or retain HCV landlords that do not require the PHA to plan and host the events themselves. Typically, these events and activities are less costly and easier to implement. For example, the HCV staff can partner with and attend other organizations' events, or even schedule and meet with an individual landlord. The complexity of the outreach does not dictate effectiveness—a phone call has the potential to have an impact on a landlord's willingness to participate in the HCV program, and it is very cost effective.

This strategy also includes ways that PHAs can utilize their own data and coordinate internally to identify and reach prospective landlords.

Related Strategies:

- Landlord Outreach Events
- Landlord Focused Customer Service

EVENTS HOSTED BY OTHER ORGANIZATIONS

On the following pages are two examples of opportunities where PHAs might partner with other organizations to deliver information about the HCV program to a variety of audiences. While the events listed in this section are hosted by other organizations and, therefore, do not require the same level of logistic considerations as events hosted by the PHA, a level of planning and development is still required.

Depending on the nature of the event and the audience, the PHA will need to prepare materials to present, hand out, or have available.

Another area where the PHA might decide to devote some planning and development is marketing. Although the events described are hosted by other entities, the information provided at the event by the PHA, as well as by other organizations is likely to have appeal for the PHA audiences including landlords and tenants.

See strategies: New Landlord Orientation, Landlord Outreach Events, and Tenant Education in this chapter for additional information on types of materials a PHA might consider and marketing tips.

Housing Industry Group Meetings

Local apartment associations, industry and investor groups, and real estate associations can be valuable partners with PHAs. They can help to disseminate information about the HCV program to their members and serve as a resource for gathering feedback from the landlord community at large. Many apartment associations hold regular meetings with their members, who may include owners and landlords, property or fee management companies, and housing developers or builders.

PHAs should consider strengthening relationships with apartment associations and similar organizations and requesting, if not already invited, to participate in apartment association meetings. Attending these meetings or events provides the PHAs with an opportunity to recruit from and strengthen ties with a large pool of landlords, both current and prospective landlords in the HCV program. It also offers a key opportunity for the PHA to combat myths and stereotypes about the HCV program and HCV tenants.

The PHA might participate by presenting information about the PHA and its programs, the HCV program, and new policies and regulations as well as listening to concerns from participants.

TIP: Be prepared with facts to counter common myths and negative stereotypes if landlords push back with stories of bad experiences! Changing perceptions of the program can be easier than it might seem. For example, several PHAs stated that one of the common myths they hear is that HCV tenants damage units. When asked, landlords acknowledge that they have had HCV and non-HCV tenants who have caused damage to units. PHAs do not always need to be on the defensive; many times people will debunk their own myths when provided with additional information.

While PHA staff may be apprehensive about the potential of hearing complaints about PHA performance or the HCV program, landlords have indicated that being heard and making contact with PHA staff is greatly valued. Additionally, PHAs have said that changes made as a result of landlord feedback have had some of the greatest impact in changing landlord perception of the HCV program. By being open to hearing criticism and feedback – relationships with apartment associations, and landlords, can change adversarial relationships to partnerships.

Housing Fairs

Housing Fairs or other convention type events are another great opportunity for PHAs to interact with current or potential HCV landlords without requiring the PHA to carry out all of the planning, logistics, and hosting duties. There may be a cost for the PHA to rent an exhibit or table space. While these types of events lack formal presentations, they provide the opportunity for substantial one-on-one interaction with those who are curious about the PHA and its programs.

TIPS:

- Make the PHA booth appealing! Have a jar to collect business cards.
- Bring informational sheets about PHA programs, including HCV.
- Bring sample paperwork and business cards.
- Bring "mythbusters" fact sheets.

APPOINTMENTS, MEETINGS, PHONE CALLS

Outreach does not necessitate hosting or even participating in an organized event. Outreach to prospective or current landlords can be done effectively through one-on-one interaction.

The desire to be heard by PHAs is commonly voiced by landlords. Meeting directly with landlords in a one-on-one or small group appointment can open lines of communication that supplement the PHA's outreach through organized workshops, forums, or other events.

Wheel Of Fortune!

It can be easy to get lost in the mix at conventions. To make their booth appealing, one PHA took an innovative approach to draw people to learn about the HCV program—Wheel of Fortune Mythbusters. Using a dry-erase table-top Wheel of Fortune-style game, the PHA landlord liaison wrote common myths about the HCV program on the wheel. Convention participants spun the wheel and had the opportunity to "bust the myth" to win a piece of candy. Examples of myths are: There is only one PHA, which is HUD; Once you agree to accept a tenant with a voucher, that tenant cannot be evicted; You do not get to choose your tenants.

By using this game, the landlord liaison created positive images and made the information appealing and fun when presenting it to groups.

In a one-on-one meeting with a landlord, the PHA has an opportunity to address the individualized concerns and needs of the landlord. Perhaps most importantly, the small scale allows landlords to ask questions that they might not feel comfortable asking in a public setting. Additionally, speaking face-to-face with landlords can help de-escalate situations.

> "Meeting with a landlord is not just about what we want but also what they want."
>
> *- PHA Landlord Relations Supervisor*

TIPS

- Consider scheduling appointments with similar landlords in groups. For example: meet with landlords who operate large apartment complexes one month, and with landlords with small portfolios the next. Groups of landlords may share common issues and concerns. If an activity, for example, the passage of new legislation, affects a certain type of landlord, the PHA might want to schedule a meeting with the landlords most impacted by this type of issue versus scheduling based on the portfolio size of the landlord.
- Before setting your schedule or attending an appointment, take time to talk to other departments within the PHA to gauge if there are specific issues that have been more common over a period of time. Example: The Inspection Department may note they have seen a change in the number of abatements over the last 6 months. The HCV landlord contact may be able to address the issue directly with landlords or, at least, enter the appointment with an understanding that the issue may come up in discussion.

IDENTIFYING AND REACHING PROSPECTIVE LANDLORDS USING PHA DATA AND PROGRAMS

The following are additional ideas targeted at recruiting new landlords using data and programs already collected or in place. These efforts do not necessarily qualify as strategies, but PHAs could use these as a starting point when developing an overall outreach strategy.

PHA Data Analysis

PHAs may want to consider a variety of tools and resources to identify prospective landlords. Many landlords post rental listings online at a number of websites, and the most-used website may vary by city and state. PHAs may want to consider reviewing rental listing postings on a weekly or monthly basis and identify any landlords they may not currently be working with. Calling landlords proactively with rental listings on behalf of the PHA to develop a relationship could help identify new landlords. Consider inviting these landlords to a new landlord orientation.

Another idea is to conduct outreach to all Low-Income Housing Tax Credit (LIHTC) properties that are required to take HCVs. It can be helpful to remind these properties of their obligation to take HCVs. It also can be helpful to establish a relationship with landlords of these properties to see if they own other communities that voucher holders may also be interested in renting.

Similarly, PHAs may want to run a listing from their line-of-business software of all current landlords and properties that rent to voucher holders. In some areas, PHAs have found that landlords only allow voucher holders to live in some of their properties, and not all. Analyzing whether the PHA has an existing relationship with a landlord that currently owns more properties may result in additional properties being open to voucher holders.

Another way to use data on current landlords and properties is to see if there are major landlords that are not currently participating in the program. PHAs may want to develop an outreach plan, coordinated with key leadership, to make a pitch to those landlords to learn more about the program.

And finally, PHAs that are particularly data savvy could access local tax records to see what landlords own the most units in their area and target those landlords. When conducting analysis, PHAs should note that over the past decade, many single-family properties are now owned by a company.

New Markets!

In one city, the landlord liaison attended young professional networking events, where she heard many of the participants mention that they or their friends had inherited a housing unit and were not sure of how to deal with it. At approximately the same time, she noticed that the HCV program showed a change in ownership trends. Many of the PHA's owners had primary sources of income unrelated to their ownership of rental housing. Participating in these networking events helped this PHA employee tap into a new group of potential owners.

Another PHA has begun talking to developers about the HCV program. They are reaching out to developers and attending city hall meetings with developers and investors to "start the conversation" with the goal of reaching new and untapped markets.

Combine Efforts with Other PHA Programs

When PHAs can piggyback the HCV program off efforts of other PHA programs, they can promote awareness of the HCV program to a new audience, which is already familiar with the PHA and its programs. These shared efforts also optimize funding or staff resource use. For example, the HUD-Veterans Affairs Supportive Housing (HUD-VASH) program challenged mayors nationwide to end homelessness among veterans. The PHAs below each took a different approach to using the buzz surrounding HUD-VASH to increase awareness of the PHA and HCV.

- During the outreach for HUD-VASH, a PHA, with the mayor's assistance, hosted a show on the local public broadcasting TV channel. Both the mayor and the VASH manager spoke about the HUD-VASH program. The show ran for approximately one month. The PHA is now considering hosting a show dedicated to the HCV program. The show was taped and broadcast at no cost to the PHA; it was seen as a community benefit.
- During the PHA's outreach for HUD-VASH, the PHA prepared a letter to be sent from the mayor to current landlords stating that the mayor supported HUD-VASH and working to end veteran homelessness. The mayor challenged landlords to set aside one unit each for a veteran.
- One PHA that has a HUD-VASH designated inspector has had great success in marketing both the HUD-VASH as well as the HCV program. The inspector is a veteran and is very effective at recruiting landlords to participate in the HUD-VASH program. Many of these landlords have gone on to also rent to HCV holders. In additional to being a veteran, the inspector has been successful because he has been able to establish a personal connection with landlords. They see him face-to-face more than any other PHA staff.

STRATEGY: INFORMATION SHARING

Providing updates, news and information on HCV and other PHA programs through the portal, websites, social media, mailers, columns or articles, and newsletters.

Who: All PHAs regardless of size and/or location.

Cost: $ $$ $$$

Implementation Considerations: ● **LOW** ● **MEDIUM** ○ DIFFICULT

Information Sharing
PHA Process Improvements

PHA Process Improvement	Information Sharing
Increase Recruitment	
Increase Retention	X
Improve Responsiveness	
Improve Tenant-Landlord Relationship	
Improve Inspections Process	X
Minimize Bureaucracy	X

WHAT THIS IS AND WHY IT WORKS: PHAs use information-sharing strategies to connect landlords with new and important information, provide timely reminders that can fine tune processes and increase satisfaction, and build the relationship between landlords and the PHA. In the past, newsletters may have been the most common way of disseminating information. Requiring some investment of time, design, and other resources, newsletters can create a focal point that landlords know to expect. Creating an electronic newsletter can be a way of keeping the product while decreasing some of the required investment. Today, though, PHAs also have access to a wide range of tools to get out periodic or time-sensitive information that require fewer resources and can be implemented more quickly. Website or portal information, social media posts, and emails or texts can be a

quick way of spreading important and time-sensitive information. Certain ways of sharing information – through the mail, email, and text – are certain to reach the landlord audience as long as the PHA is diligent about keeping contact information current. Social media posts such as on Facebook or Twitter can get the word out instantaneously as long as your audience uses those forms of media. Certain ways of sharing can also be tracked effectively, offering the PHA a way to quantify what works.

Related Strategies:

- Technology

CONTENT

A PHA may use a range of information-sharing tools and may very well use more than one strategy for the same piece of information. To determine which tools are the most appropriate and useful, the PHA will want to start by defining **WHAT**, as in, what type of information needs to be shared. The type of information will usually make clear **WHO** the audience is.

What type of information needs to be shared?

- Urgent, time-sensitive information will require the quickest ways of connecting with an audience, and may also be a good choice to promote through more than one communication means. This might mean social media, but if the information has the ability to have an immediate financial impact on the landlord, it will be important to ensure that the information has the best opportunity to reach all landlords.
- If the information is something that the audience might want to print off and keep, it might be best as a website post, newsletter item, or flyer.
- If the PHA has a number of items that have a longer time frame, a newsletter might be a good fit.

Specific types of content that a PHA might want to communicate about include:

- New policy, guidance, regulation, or law that would impact current landlords
- Hot topics or areas that the PHA has seen landlords struggling with. Example: reasonable accommodation, Fair Housing
- New PHA tools or resources
- How and where to list available housing units*
- PHA events*
- Benefits of voucher programs for prospective landlords and how to participate
- Partner resources
- Seasonal reminders, for example, smoke detector or battery changes
- Spotlights on partners
- New updates to PHA technology or resources. Example: Portal
- Where to find landlord resources*
- Client or landlord spotlight
- Requests that PHAs have of landlords such as brief surveys, satisfaction questionnaires, or contact information updates
- Information that landlords have asked for the PHA to address. Especially landlord inquiries that the PHA has needed time to look into.

* Indicates items that might be helpful to be recurring.

Who: PHAs should make decisions about distribution based on the content that will be shared. For example, seasonal reminders will be most useful for current landlords. Client and landlord spotlights, on the other hand, might be of interest to a wider range of recipients, including current and prospective landlords.

INFORMATION-SHARING METHODS

Some methods that PHAs might consider using to share their content include:

1. Newsletters
2. Re-occurring columns in other publications
3. Information posted on the PHA portal
4. Information posted on the PHA website
5. Social media posts
6. Emails or mass email, also called email blasts or bulk email
7. Texts or bulk multimedia messaging service (MMS) or short messaging service (SMS)

REMINDER: Social Media Manners – When posting on social media, be sure to monitor the comments received for opportunities to engage with responders by answering questions, referring to resources, or countering negative stereotypes.

TIP: Evaluate success with tracking data. If using a delivery method that works through emails or text and SMS messaging, the company may allow the PHA to see the number of recipients who open the message or in some way interact with it, such as, by clicking a link or sharing the content. This analysis can help the PHA determine if the method is reaching the audience and, perhaps, whether the audience is interested. Based on this data, the PHA may consider altering the frequency, content, subject line, etc. A PHA can also find out when an address was not deliverable, which can help guide contact update outreach. Keeping contact information current is the most important way of ensuring that the PHA can reach its landlords when needed.

IMPLEMENTATION CONSIDERATIONS/STEPS

To determine the appropriate information-sharing methods, look at the **WHY** and the **WHEN** as well as an important **HOW**.

Why does the PHA need to share this information? Some examples of reasons include:

- To inform of a change in HCV-related programs or policies.
- To let an audience know of time sensitive information like an event, other opportunity, or other deadline.
- To offer a positive story to remind landlords of benefits of working with the HCV program.
- To create a regular line of communication with current landlords.
- To ensure that current program forms, information, and policies are easily available.

When does the audience need to receive the information?

- Yesterday! Aim for the speediest ways of communicating.
- By a specific deadline. Select the strategies that fit the timeline.
- On a regular basis. Select strategies that the PHA can easily and regularly repeat.
- Anytime.

How does the PHA reach the audience of choice?

As mentioned before, the most significant limiting factor is contact information. If the audience is current landlords, does the PHA have their up-to-date contact information? What will it mean if the information disseminated does not get to the landlord? How does the PHA update landlord information?

If the audience is landlords who are not yet associated with the HCV program, how will the PHA increase the likelihood that they will come across and interact with the information? Consider reaching out to industry groups these landlords might belong to. The PHA might consider placing information at a location frequented by prospective landlords, such as where landlords place advertisements for available listings.

NEWSLETTERS

Newsletters, both electronic and print versions, can require a higher level of resource investment than other information-sharing strategies. Before deciding to develop a newsletter, ask the questions that follow. These questions will inform the newsletter audience, purpose, content and more.

- What is the purpose of the newsletter? Is a newsletter the best way to reach that goal?
- Who is the target audience? General public, tenants, HCV landlords, partnering agencies?
- How often will the newsletter be published? Monthly, quarterly, yearly?
- How will the newsletter be distributed? Hard copy, online?
- Who will decide what is included in each newsletter? Or how will each newsletters content be decided?
- Who at the PHA will gather the content and draft it for publication?
- How much design does the PHA want to incorporate into a newsletter? Remember that all images should have the appropriate alt-text. Color contrasts, charts, and graphs must also be compliant with section 504/508.
- Will the newsletter articles or items need to be approved within the PHA? What is that process?

As an exercise to determine how often to publish, list the 12 months (or the 4 quarters, etc.) and brainstorm what items the PHA might report on each month and who will develop these items. If the list developed does not have two items in every month or the staff person(s) who would be assigned has concerns about the time demands, consider publishing fewer issues.

TIPS:

- PHAs should consider maintaining a landlord email list.
- Readers of web-based or email-based news may read it on their phone's small screen – make sure titles are clear and compelling, and keep content short.
- Regularly updating contact information increases PHA options in selecting methods that will reach all current landlords.
- While providing information is helpful, over messaging can cause reader fatigue. PHAs should be mindful of the amount of information they send and target information to the audience who benefits from it. Information that is not useful for a particular audience may also cause readership to decline.

PHA EVENT

NO.	NAME	ORGANIZATION	PHONE	EMAIL	CHECK IF YOU WOULD LIKE ADDITIONAL INFO/FOLLOW-UP
1	First Last Name	Organization	Phone	Email	☐
2	First Last Name	Organization	Phone	Email	☐
3	First Last Name	Organization	Phone	Email	☐
4	First Last Name	Organization	Phone	Email	☐
5	First Last Name	Organization	Phone	Email	☐
6	First Last Name	Organization	Phone	Email	☐
7	First Last Name	Organization	Phone	Email	☐
8	First Last Name	Organization	Phone	Email	☐
9	First Last Name	Organization	Phone	Email	☐
10	First Last Name	Organization	Phone	Email	☐
11	First Last Name	Organization	Phone	Email	☐
12	First Last Name	Organization	Phone	Email	☐
13	First Last Name	Organization	Phone	Email	☐
14	First Last Name	Organization	Phone	Email	☐
15	First Last Name	Organization	Phone	Email	☐
16	First Last Name	Organization	Phone	Email	☐
17	First Last Name	Organization	Phone	Email	☐
18	First Last Name	Organization	Phone	Email	☐
19	First Last Name	Organization	Phone	Email	☐
20	First Last Name	Organization	Phone	Email	☐

Certificate of Completion

THIS CERTIFIES THAT

TENANT

has completed all the requirements of the
Anytown PHA Tenant Education Course
October, 2019

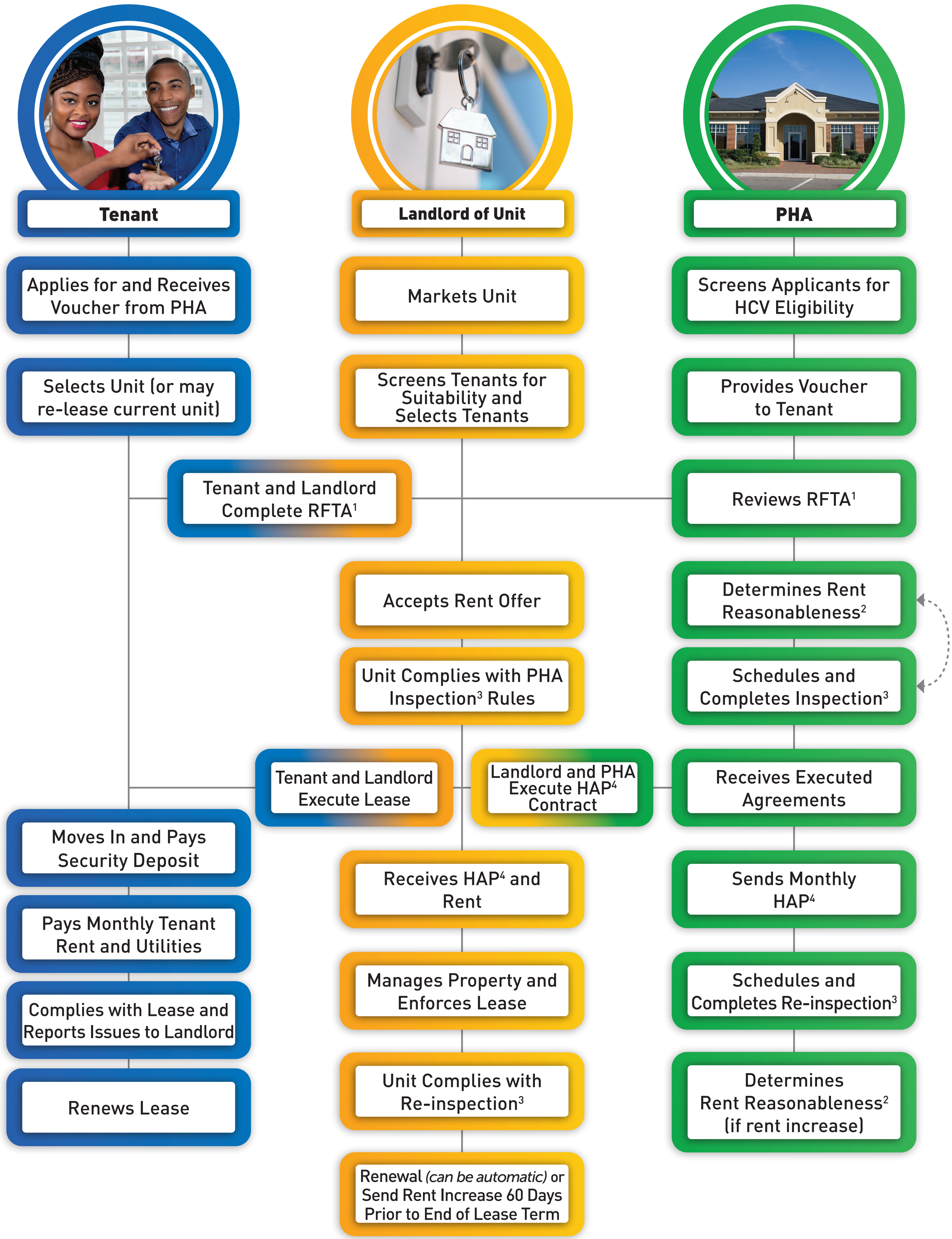
Jane X.
PHA DIRECTOR

Paul Q.
HCV DIRECTOR

DocuSign Envelope ID: A6DAE94E-8E80-4AE2-AAD1-16C9972CD143

Housing Choice Voucher Program

General Lease-Up Process for Landlords, Public Housing Authorities (PHAs) and Tenants



Endnotes

[1] Request for Tenancy Approval (RFTA): Before approving the assisted tenancy and executing the Housing Assistance Payments (HAP) contract, the PHA must ensure that the following program requirements have been met:

- The unit is eligible;
- The unit has been inspected by the PHA and meets Housing Quality Standards (HQS);
- The lease includes the tenancy addendum;
- The rent charged by owner is reasonable; and
- For families receiving HCV program assistance for the first time, and where the gross rent of the unit exceeds the applicable payment standard for the family, the PHA must ensure that the family share does not exceed 40 percent of adjusted monthly income. This cap is referred to as the maximum family share (24 CFR 982.508).

In addition, the PHA must not approve:

- If the PHA has been informed (by HUD or otherwise) that the owner is debarred, suspended, or subject to a limited denial of participation under 2 CFR part 2424.
- If the owner is the parent, child, grandparent, grandchild, sister, or brother of any member of the family, unless the PHA determines that approving the unit would provide reasonable accommodation for a family member who is a person with disabilities. This restriction against PHA approval of a unit only applies at the time a family initially receives tenant-based assistance for occupancy of a particular unit, but does not apply to PHA approval of a new tenancy with continued tenant-based assistance in the same unit.
- Other reasons as defined in 24 CFR 982.306.

[2] Rent Reasonableness: HUD regulation 24 CFR 982.507 requires that PHAs perform a rent reasonableness determination before executing a HAP contract and before any increase in rent. The PHA must determine that the proposed rent is reasonable compared to similar units in the marketplace and not higher than those paid by unassisted tenants on the premises.

[3] Inspections: PHA must inspect the unit leased to a family prior to the initial of the lease, at least biennially during assisted occupancy (triennially for rural PHAs), and at other times as needed, to determine if the unit meets the HQS.

Some, but not all, PHAs have additional flexibility to approve tenancy and begin paying HAP on a unit that fails to meet the HQS, provided the deficiencies are not life-threatening and/or to approve assisted tenancy of a unit before the PHA conducts the initial HQS inspection if the property has, in the previous 24 months, passed a qualifying alternative inspection. For more information on these provisions see PIH Notice 2017-20.

[4] Housing Assistance Payment (HAP): is the monthly assistance payment by a PHA, which is defined in 24 CFR 982.4 to include: (1) A payment to the owner for rent to the owner under the family's lease; and (2) An additional payment to the family if the total assistance payment exceeds the rent to owner.

The HAP contract is the housing assistance payments contract between the owner and the PHA.