



ASHEVILLE HOUSING AUTHORITY

165 SOUTH FRENCH BROAD AVE.

ASHEVILLE, NORTH CAROLINA 28801

To: Tilman Jackson, Chairman,
Housing Authority of the City of Asheville Board of Commissioners

From: Monique Pierre, President and CEO
Housing Authority of the City of Asheville

Date: March 27, 2024

RE: Organizational Change Management - Departmental Analysis
Housing Choice Voucher Program

PURPOSE

The purpose of this memorandum is to inform the Board of Commissioners of the results of the initial steps in the KPI process for the Housing Authority of the City of Asheville (HACA) Housing Choice Vouchers Program (HCVP).

BACKGROUND

The HACA administers 3,459 Housing Choice Vouchers (HCV) as well as admissions for 2117 units owned by HACA. The staff also prepares files for Maple Crest, Asheville Terrace, and a handful of other properties with special purpose vouchers such as Near Elderly Disabled (NED), Veterans Administration Supportive Housing, and Youth Aging Out vouchers. The Housing Choice Voucher Department is responsible for admissions and administering the vouchers, including applications, waitlist management, annual recertifications, Moving to Work (stepped rent study), preparing files for unit assignment, etc. With the total number of vouchers along with the added responsibilities of staff, the HCVP department was selected first for the launch of the HACA organizational change management process.

What brought about this study? At the September Board of Commissioners meeting, a staff member spoke-up and stated that morale was low and staff were exhausted in HCVP. My recent actions to address case load fatigue was to offer a supplemental payment to impacted HCVP staff. Subsequently, I had a meeting with the line staff from that department and was further informed about their concerns including, exhaustion from increased case load burden due to low staffing levels, additional workload due to the Moving to Work (MTW) initiative, lack of communication, training and direction. Understanding the severity of the situation, I determined that additional assessment and analysis was required to address their concerns.

I immediately paused pulls from the waiting list, designated Thursdays as no-walk-in appointment only days, shortened the hours that clients could have appointments or do walk-in on Monday-Wednesday and began organizational assessment planning. Concurrently, we aggressively



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pursued recruiting and hiring new staff for the HCVP department. All of these actions were taken in an effort to get staff immediate relief and allow time for them to catch up with their work, for HR to hire for vacant positions and for me to evaluate their processes to determine where efficiencies and streamlining could positively impact process timing.

I selected the Key Process Indicator (KPI) approach and assigned Elaine Scott, the Internal Compliance and Audit Specialist to implement the protocols of the KPI process.

TIMING

The process planning took place in the late fall and working sessions were scheduled for early 2024. The timeline for the launch was intentionally scheduled to coincide with the end of the pause in waitlist pulls that were planned to commence again in early February of 2024. The launch of the work sessions was delayed by a couple of weeks due to scheduling difficulties in the HCVP department.

Process Mapping (1)	Jan 08, 2024	8:00am-9:30am
Process Mapping (2)	Jan 25, 2024	8:00am-10:00am
SWOT Analysis	Jan 25, 2024	8:00am-10:00am
KPI	Feb 15, 2024	12:00pm-2:00pm

Follow-up to review KPIs will include the examination of the processes and benchmarks established during the working session.

Start 30-60-90 Day Review	May 6, 2024	
Project Completion	Q2 2025	

THE PROCESS

Three interactive working sessions were designed to assist with the analysis of the workflow processes within the department, identify inefficiencies, brainstorm opportunities for updating or streamlining processes and bringing procedures into better alignment with the HUD regulations. Each session was intended to be interactive and encourage staff involvement. Other staff members whose work intersects with HCVP, including Accounting, Family Self-Sufficiency (FSS), and IT were invited to participate in the working sessions. The interactive approach is essential in addressing specific needs and objectives within the Asheville Housing Authority, benefiting both the organization as a whole and individual team members.

The KPI process involved three intensive working sessions conducted over a period of two months.



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Phase I – Process mapping. Staff were divided into working groups and lead through the exercise of identifying critical departmental functions. Then they mapped out the processes, discussing steps, HUD requirements, deviations, and ideas for improvement.

Phase II – SWOT analysis. Each working group conducted an analysis of their major functions. The analysis allowed each team to identify the strengths, weaknesses, opportunities and treats in the processes.

Phase III – KPI setting. The KPIs is a tool that level sets for goals and allows changes in the processes, once implemented, to be measured.

OBJECTIVE

The work sessions were implemented to ensure that our team members are equipped with the necessary skills and knowledge to excel in their roles and drive organizational success.

ANALYSIS

The HCVP department has a history of high staff turn-over. In the past nine (9) months five (5) staff members have left the HACA from the HCVP department. Stated reasons included, better working conditions, better work environment, the toll that the work was taking on their mental health and general dissatisfaction with organizational leadership. Staff caseloads had to be redistributed which in turn overburdened the staff. During the pause in pulls from the waiting list, other staff assisted where they could to help even if the duties were outside of their normally assigned functions.

OBSERVATIONS – Key Takeaways

Staffing

Establishing the appropriate staffing levels is critical in a high-volume department. According to Nan McKay, an expert training organization in the housing field, “the recommended annual caseload for experienced staff for reexaminations is 450. Since they don't have to handle moves, they're expected to handle up to 45 cases per month”.

<https://blog.nanmckay.com/2013/01/achieving-high-performance-in-the-hcv-program-tip-4>

It is also important to acknowledge that due to the number of high need clients admitted to our housing, a simple recertification is never simple and often involves coordination with third party service provider partners and extraordinary efforts to secure paperwork.

Insufficient staffing in the HCVP department impacted the staff's ability to complete their work without extraordinary efforts, staff working across disciplines, and extended overtime. The HCVP Specialists are carrying varying caseloads. New staff have been assigned case levels that exceed the recommendation for their level of training and experience, while experienced



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Specialists are carrying in some instances 100 fewer cases or not assigned cases at all. There has been a reluctance and inconsistency in the assignment of caseloads and training. Also, due to the previous staffing shortages, the Co-Directors were assisting with some caseload work as well as preparing files for unit assignment.

Housing Choice Voucher Program (HCVP) Staffing and Caseload Snapshot

Staff Name	Job Title	Caseload
Michelle Moore	Co-Director HVCP	
Noelle Tackett	Co-Director HCVP	
Staff with Case Loads		
Cornelia Battle	PBV (Altamont/Aston/Bartlett/Gardens)	308
Andy Boell	PBV (Hillcrest/Klondyke) - HSS	355
Ari Katzovich*	TBV (M-Z) - HSS	540
Moriah (Mo) Mora*	TBV/VASH (A-B) - HSS	473
Kendra Roberts	PBV (Deaverview/Pisgahview) - HSS	345
Ken Rodriguez*	TBV (C-L) - HSS	538
Audrey Shoenbachler	PBV (Maple Crest/Southside) - HSS	328
Kristen Bishop	TBV – EHV	44
Staff w/o Case Loads		
Nicole Dixon*	HCV - HSS	0
Marva Campbell	HCV – HSS (Audit/Reports)	n/a
Lindsey Creasman	HCV - HQS Inspector	n/a
Kerry Moffat	HCV/TBV - Landlord Outreach Coordinator	n/a
Admissions		
Angela Hannah	HCV - Admissions Specialist	n/a
Sandra Kuykendall	HCV – Admissions Specialist	n/a
Caroline Logan	HCV – Admissions Coordinator	n/a
Morgan Miller	Admissions - HSS	n/a

*Indicates new hires within the past 6-9 months

Newly Hired		
Josh Blade*	New Hire – HSS	n/a
Alexandra Thompson	New Hire - Admissions	n/a
Vacancies Posted		
Vacant	HCV – HSS (1)	
Vacant	PBV - HQS Inspector – PBV (1)	
Vacant	HCV – File Clerk (1)	



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In addition, the process mapping showed the following:

- One (1) staff person conducting tenant file preparation and distribution to sites
 - This is overwhelming for one staff member and is a high-risk protocol for such a critical role.
- Moving to Work (MTW) is a high intensity program
 - Large addition to casework
 - Study participation for research purposes and additional meeting and HUD submittals
 - Extra steps to get participants signed up to the study groups
 - Coordinating with other departments to ensure consistency in messaging and the best options for residents.
- Directors are carrying caseloads due to low staffing
 - Directors conduct hearings, liaise with developers and non-profit partners, supervise staff, and prepare monthly reporting along with other tasks.
- One (1) inspector is handling all of the HCV inspections
 - Because of the lack of a second inspector, the HACA contracts with a secondary inspector, despite HUD's approval to inspect our own RAD properties. This represents an added expense that if done internally would represent a cost savings.
- Traditional practices don't always align with new guidance.
 - Staff discovered that there were some discrepancies in how they conduct certain tasks.

The SWOT analysis demonstrated the following:

Strengths –

- Strong supportive Management
- Dependable staff
- Experience staff
- Effective training materials
- Strong sense of team work
- Strong customer service skills
- Bonuses for retention
- Incentives
- Technology
- Reliability of payments
- Mitigation funds
- Incentives
- Outreach coordinator
- Voucher referrals
- Good checks and balances are in place with property directors, HCVP, and accounting
- YARDI provides for centralized reporting system

Weaknesses –

- Understaffed, have to depend on other staff to pitch in



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- Communication between departments
- Communication with agencies on both sides
- Lack of hyper-specific relevant knowledge
- Internal communication
- Lack of digitization creates time sink
- Low Moral
- Exercises not always effective.
- Luncheon meetings people come in for the food grab it and then leave
- Company moral
- No company-wide functions or celebrations happening
- Employee retention
- Lack of cross training
- Caseloads too large
- Not enough staff
- Not enough pay for workload
- Timeline
- Bureaucracy
- Overload/excess workload
- YARDI
- Not enough voucher holders
- Not enough communication between departments
- Payment delays
- There aren't cross training measures in place with adequate/multiple staff having knowledge, training, and access to run reports
- Timely processing and approval can often delay processing needed to meet HUD and other deadlines
- Data discrepancies exists between VMS reporting and YARDI analytics and other YARDI reporting

The opportunities and threats will be documented when the KPIs are completed. However, the weaknesses speak to many of the observations during our initial analysis. Clearly, engaging staff further solidified the need to take further actions to support the HCVP staff.

CONCLUSION

The initial steps in the HCVP organizational change process have enhanced staff involvement in problem solving, leadership's awareness of the difficulties staff face and helped established baseline goals for performance improvements. The reluctance noted stems from some staff's failure to submit their KPIs. The However, the HACA leadership and Compliance and Internal



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Audit Specialist will reconvene and place an emphasis on the importance of collaboration, continuous learning and aligning our practices with strategic objectives.

Next Major Milestone

The next major milestone is the implementation of 30-60-90-day follow-up discussions starting approximately May 6, 2024 with each group to assess utilization of training concepts and their impact on organizational effectiveness. The anticipated end date should fall around Q2 of 2025.

RECOMMENDATIONS

It is the recommendation of the HACA President and CEO with advisement from the Compliance and Internal Audit Specialist to continue with the Organizational Change activities including completion of the KPI exercise. Additionally, we will continue to work with staff to tackle the following areas:

- Hiring additional staff to lessen the caseloads to more manageable levels
- Train FSS staff to begin conducting some of the documentation and recertification work for the residents they work with
- Look for creative ways to reapportion case loads based on the expertise of individual Housing Specialists
- Provide additional training for less experienced staff and refreshers for all staff
- Provide leadership and management training for staff
- Create a management level within the department to allow for more efficient decision making
- Plan for better facilities for staff to have the ability to meet face to face with their clients
- Ensure that staff suggestions for process improvement are more readily implemented