



INDIANAPOLIS HOUSING AGENCY

“Moving Forward” Transition Plan

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Introduction

During the next several months, the Indianapolis Housing Agency will undergo a “Moving Forward” Transition Plan. The Plan is not intended to be a full Strategic Plan. Rather, the results of the Transition Plan will serve as a foundation for a Strategic Plan. While the current planning process will primarily be an internal effort, IHA will proactively work with HUD, residents, and community partners to ensure short-term and long-term success. Further, the Strategic Planning process will incorporate even more significant input from these same groups.

The Plan will tackle three focus areas: Internal Operations, Employee Relations, and Programmatic Success. Focus areas and individual items are not presented in a priority order.

Within each area, an Assessment Stage and an Implementation Stage will be necessary. During the Assessment Stage, IHA leadership will continue to build out and shift priorities for the Implementation Stage. While there will not be a clean line of separation between the two stages, we have broken them out below in order to ensure that the questions in the Assessment Stage are not bypassed and forgotten while jumping straight into the Implementation Stage.

In addition to other activities, each area will begin addressing organizational concerns such as policies and procedures to ensure that these transition activities are embedded into the institution at IHA and will live long beyond the tenure of any individual leadership team.

IHA will report out publicly on progress on each of the below questions and actions individually on a regular basis. We have noted where outside influences such as funding and community partnerships are major factors in the success of individual components of the plan. We appreciate and will rely on your input in identifying opportunities for IHA to continue to improve this plan and our work.

Note from Interim Executive Director Marcia E. Lewis

As a basis for continual improvements here at the Indianapolis Housing Agency, I'm proud to present this "Moving Forward" Transition Plan. It is the culmination of hard work across all levels of the Agency and valuable input and support from across the community.

The sheer size of this plan is telling of all the work we know we have to do. In many cases, it the basis for strategic decisions about where to prioritize work and resources that need to implemented or utilized immediately versus that which we can only flag for future action.

We fully acknowledge that as part of the long-range plan some of this work is necessary for us to move forward but as based on priority and level of criticality, it may mean we need to temporarily reprioritize work which might impact our core day-to-day activities. Never will we fail to prioritize our mission of affording safe, and quality housing; encourage individual and family self-sufficiency, promote fair housing and fight housing discrimination.

I understand the difficulty of change for all, but we will do our best through transition to support the needs of our IHA families internally and externally.

Thank you for your input . . . thank you for your patience and understanding . . . most of all thank you for helping IHA become all that it can be . . .

Thank you for being part of moving forward.

Internal Operations

In order to provide quality service to our clients and have an impact in our community, IHA needs to be sure our house is in order. Ensuring we have resources to do our work and that those resources are allocated in a consistent and fair manner is foundational to all we do.

Finance - No work will get done without money, and IHA needs to do work to present a clear picture of our financial situation, and lay the groundwork for financially stable operations for years to come.

IT - In the 21st century, information technology can change how business gets done in profound ways. Unfortunately, IHA lags behind in several IT basics that should be taken for granted in the modern workplace. IHA will assess our needs and create a plan to update our IT accordingly.

Contracts - IHA relies on various contracts to provide quality service to our client base. As a steward of taxpayer dollars, we have an obligation to ensure that these contracts are executed in alignment with the appropriate policies and regulations, that we are receiving the services according to the contractual agreements, and that we are paying a fair price.

Finance - Assessment Stage

Activities, Progress, and Next Steps

Question: What is the Agency's Financial Situation (including Cash Flow, Budget, Bottom Line, etc.)?
This should include topline figures for IHA and Insight as well as breakouts by program and by property (to include assessments of reserve accounts).
Steps to be Taken to Answer Question:
HUD Technical Assistance provided by Econometrica - IHA Lead: Robert Curtis The Technical Assistance provider has been gathering information remotely and will be onsite in March of 2022. On-Site Peer Organization Assistance - IHA Lead: Marcia Lewis Due to capacity constraints, peer organization assistance will begin following HUD Technical Assistance and completion of IHA audit requirements.
Answers:
TBD

Question: How can we Reduce Costs or Increase Income?
Steps to be Taken to Answer Question:
Senior Team Facilitated Conversations - IHA Lead: Robert Curtis Complete - February 2022
Answers:
Many: See Following Page

Question: What Compliance and Cash Flow Issues do we have?
Steps to be Taken to Answer Question:
Monthly Property-Level Reports and Meetings to Be Established - IHA Lead: Robert Curtis
Answers:
Short Term: Immediate Need to Pay HUD OIG Audits within 60 days of 1/1/2022 Long Term: Financial Audit Findings Response, TBD Based on Property-Level Reports

Finance - Implementation Stage

Activities, Progress, and Next Steps

Monthly Property-Level Reports and Meetings to Be Established - IHA Lead: Robert Curtis

- Pilot Property Kicking Off (Spring 2022)

Prioritize Opportunities for Cost Savings and Increased Income - IHA Lead: Various

A significant list of cost saving opportunities have been identified with the IHA Senior Team. A number of items have been flagged for immediate action, and others will be prioritized according to staff capacity.

Immediate Priorities:

Assess Contracts for Potential Savings (Including Bringing Work In-House) - IHA Lead: Jacqi Brown

- Creating Contract Inventory (March 2022)
- Identifying Contract Monitors Underway (March 2022)
- Contract by Contract Assessment Underway (March 2022)

Identify Available Volunteer Support - IHA Lead: Francine Jones/Mike Robinson

- Conversations with Goodwill about Community Workers Underway (February 2022)

Increase Rent Collection and Ensure Lease Enforcement - IHA Lead: Chris Walsh

- A portion of the Asset Management Get Healthy Plan (Further detail in Appendix A)

Maximize Occupancy - IHA Lead: Chris Walsh

- A portion of the Asset Management Get Healthy Plan (Further detail in Appendix A)

Negotiate In-Kind HUD Repayments - IHA Lead: Marcia Lewis

- Conversations with HUD underway (February 2022)

Refinance Loans at Lower Interest Rates - IHA Lead: Marcia Lewis

- Data sharing with potential partners underway (February 2022)

Lease Available Commercial Spaces (To Potentially Include Advertising Space) - IHA Lead: Leah Dancer

- (Ongoing)

Reduce Utility Late Fees; Apply for Grant Funding; Establish Preventative Maintenance Plan; Establish Office by Office Budgeting Process; Go Paperless/Reduce Outgoing Mail; Consider Inspections Charges After Multiple Fails; Rent Community Spaces

Identify Solutions for Compliance and Cash Flow Issues - IHA Lead: Various

Immediate Need to Pay HUD OIG Audits within 60 days of 1/1/2022 - IHA Lead: Robert Curtis

- Payment made February 2022

Financial Audit Findings Response - IHA Lead: Chris Walsh

- Kickoff to follow HUD Technical Assistance

Assess Available Funding - IHA Lead: Various

Access Capital Fund - IHA Lead: Molly Morgano

- Finishing required document submission (March 2022)

Implement Annual Adjustment Factor and OCAF Changes - IHA Lead: Marcia Lewis

- Kicking off (March 2022)

Access Replacement Reserves - IHA Lead: Robert Curtis

- Coordinating with investors (March 2022)

IT - Assessment Stage

Activities, Progress, and Next Steps

Question: What IT Needs do we have?
This includes hardware needs, software needs, and training needs.
Steps to be Taken to Answer Question:
Senior Team Input - IHA Lead: Chris Walsh Complete - February 2022 Contractor-Led Assessment of IT Needs - IHA Lead: Molly Morgano Kicked off in February of 2022
Answers:
Many: See Following Page

IT - Implementation Stage

Activities, Progress, and Next Steps

Implement Improvements - IHA Lead: Various

A significant list of opportunities for IT improvements have been identified with the IHA Senior Team. The list will be further built out and prioritized according to findings from the contractor-led assessment underway. A number of items have been flagged for immediate action, and others will be prioritized according to staff capacity.

Immediate Priorities:

Purchase Laptops - IHA Lead: Marcia Lewis

- In the final stages of the procurement process for 25 laptops for select staff members (March 2022)

Upgrade Wifi on Properties - IHA Lead: Kathleen Curran

- In the final stages of the procurement process for wifi upgrades (March 2022)

Upgrade Cell Phones - IHA Lead: Kathleen Curran

- In the final stages of the procurement process for upgraded cell phones (March 2022)

Additional Actions:

Network and Server Upgrades; General Computer Upgrades (Including Windows 10); Increased Helpdesk Capacity; IndyHousing.org Access; Video Conferencing Software and Hardware; Laptop Docking Stations; Security Camera Replacements; Public Phone Number Upgrades; Electronic Payment Options for Residents; Electronic Document Submission Options for Clients; Internal Dashboards; Two-Way Radios for Maintenance Staff; Yardi Implementation

Enable Telework - IHA Lead: Marcia Lewis

Telework will be available to employees on a case-by-case basis following issuance of laptops (March 2022)

Telework will be available to greater number of employees on a regular basis following network and server upgrades (Anticipated for Winter 2022)

Telework will be available to employees in remote-capable positions following move to paperless (Anticipated for Winter 2023)

Develop Plan to go Paperless - IHA Lead: TBD

Paperless Plan Development to Coincide with Yardi Implementation Plan (Kickoff Summer/Fall 2022)

Contracts - Assessment Stage

Activities, Progress, and Next Steps

Question: What is our Existing Portfolio of Contracts?
Steps to be Taken to Answer Question:
Examine Existing Master Contract List - IHA Lead: Jacqi Brown In Process - March 2022 Augment with Accounts Payable data - IHA Lead: Ishanthi Perera In Process- March 2022
Answers:
TBD

Question: What Existing Contracts Need Immediate Action?
Renewal; Issuing RFP; Identifying IHA Staff to Monitor/Verify work
Steps to be Taken to Answer Question:
Renew Contracts - IHA Lead: Jacqi Brown Ongoing Assign Contract Monitors - IHA Lead: Chris Walsh Kicked off February 2022 Weigh Contract Changes - IHA Lead: Chris Walsh Kicked off February 2022
Answers:
TBD

Question: Have any Existing Contracts been Executed Improperly?
Lack of Compliance with HUD Regulations or IHA Policy
Steps to be Taken to Answer Question:
Develop Clear Policy on IHA Procurement Requirements (Including HUD Regulatory Requirements) - IHA Lead: Jacqi Brown Kicked off February 2022 Compare Policy with Contract Portfolio - IHA Leads: Jacqi Brown/Ryan Waggoner To Follow Requirements Gathering (April 2022)

Answers:

TBD

Contracts - Implementation Stage

Activities, Progress, and Next Steps

Execute Immediate Contract Needs - IHA Lead: Jacqi Brown

- Renew Expiring Contracts or Issue RFPs (Ongoing)

Assess Contracts for Potential Savings (Including Bringing Work In-House) - IHA Lead: Jacqi Brown

- Creating Contract Inventory (March 2022)
- Identifying Contract Monitors Underway (March 2022)
- Contract by Contract Assessment Underway (March 2022)

Assess Contracts for Compliance Issues - IHA Lead: Jacqi Brown/Ryan Waggoner

- Creating Contract Inventory (March 2022)
- Contract by Contract Assessment Underway (March 2022)

Establish Portfolio Report and Contract Evaluation Process - IHA Lead: Jacqi Brown/Robert Curtis

- Long Term Goal

Internal Operations Organization - Assessment Stage

Activities, Progress, and Next Steps

Question: What New and Updated Policies, SOPs, Forms, Training, etc. do we Need?
IT; Finance; Contracts
Steps to be Taken to Answer Question:
Senior Team Input - IHA Lead: Chris Walsh Complete - February 2022
Answers:
Many: See Following Page

Internal Operations Organization - Implementation Stage

Activities, Progress, and Next Steps

Prioritize, Update, Train - IHA Lead: Various

A significant list of opportunities for internal operations organization improvements have been identified with the IHA Senior Team. A number of items have been flagged for immediate action, and others will be prioritized according to staff capacity.

Immediate Priorities:

Update Payment Approval Process - IHA Lead: Robert Curtis

- Process Updated (February 2022)
- Training and Continuous Process Improvement Underway (March 2022)

Contract Monitor Training - IHA Lead: Jacqi Brown

- To Follow Designation of Contract Monitors (April 2022)

Financial Delegations of Authority - IHA Lead: Marcia Lewis

- Draft Dollar Thresholds for Delegated Authority Developed and in Review (March 2022)

Payroll/Finance Communication Process - IHA Lead: Marisa Malone

- Process Updated (January 2022)

Additional Actions:

Create IT Equipment Log; Update Credit Card Expense Process

Employee Relations

IHA's employees are the lifeblood of our organization. Without the incredible team we have, IHA would not be able to serve a single household. We have significant work to do to put IHA on a sustainable path so that we have the appropriate number of engaged staff who are equipped to do the work.

Employee Engagement - IHA needs to become a great place to work again. Engaged employees are productive employees and IHA Leadership is committed to demonstrating that we value our team like a family.

Human Resources - HR is another essential service like many in the Internal Operations part of the plan, and it is also one that affects employees on a very personal level. We need to ensure employees are clear on how federal, state, and local laws affect their time and attendance, especially in light of COVID-19.

Staffing - One of the biggest reasons that any organization succeeds or fails is due to staffing. Ensuring that we have the right people in the right place, and especially that we are staffed appropriately for our workload is essential. This not only impacts Agency performance, but it also helps build a sustainable workforce for the future.

Employee Engagement - Assessment Stage

Activities, Progress, and Next Steps

Question: How do Employees Feel?
Steps to be Taken to Answer Question:
Hold Employee Listening Sessions - IHA Leads: Marcia Lewis/Chris Walsh Complete - January/February 2022 Create Regular Employee Survey - IHA Lead: Chris Walsh Draft in Review - March 2022
Answers:
Staff Shortages Create Stressful Environment; Salary Levels Encourage Attrition; Limited Career Advancement Opportunities Decrease Engagement; Lack of HR Policies Creates Confusion

Employee Engagement - Implementation Stage

Activities, Progress, and Next Steps

Address Identified Challenges - IHA Lead: Various

Staff Shortages Create Stressful Environment

- Addressed in Staffing Section (Page 20)

Salary Levels Encourage Attrition - IHA Lead: Chris Walsh

- Weighing Creation of New Career Ladder Steps in Accordance with Financial Capacity

Limited Career Advancement Opportunities Decrease Engagement - IHA Lead: Chris Walsh

- Weighing Creation of New Career Ladder Steps in Accordance with Financial Capacity

Lack of HR Policies Creates Confusion - IHA Lead: Marisa Malone

- Hired a permanent Payroll and Employee Relations Director (February 2022)
- Drafting attendance, COVID, and short term disability policies (March 2022)
- FMLA processing being outsourced (March 2022)

Establish Regular Employee Feedback Mechanisms - IHA Lead: Chris Walsh

- Drafting (March 2022)

Human Resources - Assessment Stage

Activities, Progress, and Next Steps

Question: What Opportunities for Improvement Exist?
Steps to be Taken to Answer Question:
Senior Team Input - IHA Lead: Chris Walsh Complete - February 2022
Answers:
Consider Opportunities for Payroll Process Improvement; Create Employee Offboarding Process; Employee Career Ladder Opportunities; Provide Manager Training on HR Policies

Human Resources - Implementation Stage

Activities, Progress, and Next Steps

Create Clarity for Employees on Key Issues - IHA Lead: Marisa Malone

- Hired a permanent Payroll and Employee Relations Director (February 2022)
- Drafting attendance, COVID, and short term disability policies (March 2022)
- FMLA processing being outsourced (March 2022)

Consider Opportunities for Payroll Process Improvement - IHA Lead: Marisa Malone

- Weighing Options (March 2022)

Create Employee Offboarding Process - IHA Lead: Marisa Malone

- Anticipated Kickoff (Spring/Summer 2022)

Employee Career Ladder Opportunities - IHA Lead: Chris Walsh

- Weighing Creation of New Career Ladder Steps in Accordance with Financial Capacity

Staffing - Assessment Stage

Activities, Progress, and Next Steps

Question: What industry standards exist for staffing levels?
Case Workers; Property Managers; Maintenance Techs; Support Staff
Steps to be Taken to Answer Question:
Request to HUD - IHA Lead: Chris Walsh Request Made - February 2022 Request to CLPHA - IHA Lead: Chris Walsh Request Made - January 2022
Answers:
TBD

Question: What are our desired hires?
Steps to be Taken to Answer Question:
Senior Team Input - IHA Lead: Chris Walsh Complete - February 2022
Answers:
Many: See Following Page

Staffing - Implementation Stage

Activities, Progress, and Next Steps

Shift Internal Staff - IHA Lead: Chris Walsh

- Realigned Over a Dozen Internal Staff to New Roles (February 2022)

Create Desired Hire List - IHA Lead: Chris Walsh

The below list is intended to capture an ideal state, rather than a roadmap for immediate hires. As with the entire Moving Forward Transition Plan, this living list will change over time. Positions are not listed in any particular order.

Vice President of Insight Development	Vice President of Asset Management
IT Director	Payroll Specialist
HR Generalist	Procurement Specialist
Homeless Voucher Case Manager	Landlord Liaison
HCV Finance Specialist	Finance Specialists (4)
Development Manager	Resident Relations Coordinators (2)
Communications Director	Customer Service Manager
Management Analyst	Data Analyst
HCV Administrative Assistant	Customer Service Representatives (2)
HCV Inspectors (2)	HCV Case Managers and Intake Spec. (10)
Property Managers (8)	Assistant Property Managers (12)
Maintenance Staff (32)	Compliance Specialist
Grant Writer	General Counsel
Maintenance Clerk	Security Officers (2)
IT Specialist	Emphasys Elite Specialist

Hire According to Financial Capacity - IHA Lead: Chris Walsh

- Contingent Upon HUD Financial Assessment and Contract Assessment Processes; Determinations Will Also Be Made Based on Sources of Available Funds (Spring/Summer 2022)

Employee Relations Organization - Assessment Stage

Activities, Progress, and Next Steps

Question: What New and Updated Policies, SOPs, Forms, Training, etc. do we Need?
Steps to be Taken to Answer Question:
Senior Team Input - IHA Lead: Chris Walsh Complete - February 2022
Answers:
Org Chart; Manager Training; Update Performance Plans; Key Policy Updates

Question: Where do Job Expectations Need Clarification?
Steps to be Taken to Answer Question:
Employee/Manager Performance Planning Conversations - IHA Lead: Chris Walsh Kickoff Anticipated - March/April 2022
Answers:
TBD

Employee Relations Organization - Implementation Stage

Activities, Progress, and Next Steps

Create Org Chart - IHA Lead: Chris Walsh

- Complete (February 2022)

Provide Manager Training on HR Policies - IHA Lead: Marisa Malone

- Anticipated Kickoff (Spring/Summer 2022)

Ensure all Employees are on Up-to-Date Performance Plans - IHA Lead: Chris Walsh

- Anticipated Kickoff (March/April 2022)

Create Clarity for Employees on Key Issues - IHA Lead: Marisa Malone

- Hired a permanent Payroll and Employee Relations Director (February 2022)
- Drafting attendance, COVID, and short term disability policies (March 2022)
- FMLA processing being outsourced (March 2022)

Additional Actions:

Update Additional Sections of Employee Handbook; Provide Staff-Wide ADP Training; Update Request for Training Form; Update Personnel Action Form

Programmatic Success

IHA's mission is to provide low-income families, seniors, and families with disabilities access to affordable housing either in one of IHA's communities or in private market housing. It is our hope that by helping these families afford safe, quality housing, we will also encourage individual and family self-sufficiency, promote fair housing, fight housing discrimination, and ultimately make Indianapolis a better place for everyone to live.

Program Performance - While our internal operations and employee relations are essential to keeping IHA healthy, our client-facing programs are ultimately what we are here to do. If we are not setting the organization up for long term success by operating performing programs, then all of the other efforts are for naught.

Compliance - In everything we do, IHA is committed to remaining compliant with federal, state, and local laws and regulations. We view these oversight bodies as true partners who are trying to tackle the same systemic issues that we are to improve the community. IHA will work proactively to ensure compliance with our regulators.

Community Engagement - IHA doesn't operate in a bubble, and we know that we can't improve our community alone. We need help from partners across the community if we are to truly have a far-reaching and positive effect on Indianapolis.

Program Performance - Assessment Stage

Activities, Progress, and Next Steps

Question: What Immediate Program Concerns do we Have?
Asset Management; Section 8; Resident Relations
Steps to be Taken to Answer Question:
Operations Team Input - IHA Lead: Chris Walsh Complete - February 2022
Answers:
Many: See Appendices

Program Performance - Implementation Stage

Activities, Progress, and Next Steps

Address Concerns - IHA Lead: Various

In diving into all of the challenges in our program area, we realize that there is much more to do than can be concisely conveyed in this plan. IHA has therefore created living drafts of an Asset Management Get Health Plan (Appendix A - IHA Lead: Chris Walsh) and a Section 8 Improvement Plan (Appendix B - IHA Lead: Shante Taylor). A Resident Relations Improvement Plan is also in development (March 2022 - IHA Lead: Karen Washington).

Compliance - Assessment Stage

Activities, Progress, and Next Steps

Question: What Compliance Work Needs to be Completed Now?
Investors; HUD; IHCDA
Steps to be Taken to Answer Question:
Conversations with Investors, HUD, IHCDA - IHA Lead: Marcia Lewis Complete - February 2022
Answers:
IHCDA LIHTC Report (1/31); Past Due HUD Reports; Past Due Investor Reports

Question: What are our Regular Compliance Needs?
Investors; HUD; IHCDA
Steps to be Taken to Answer Question:
Conversations with Investors, HUD, IHCDA - IHA Lead: Crystal Coleman In Progress - March 2022
Answers:
Need for Expanded Compliance Function to Include Training

Compliance - Implementation Stage

Activities, Progress, and Next Steps

Build Out Compliance Function - IHA Lead: Crystal Coleman

Clearly Delineate Compliance Division Work from Core Programmatic Work

- Complete (February 2022)

Expand Number of Employees in Compliance Division by Shifting Internal Resources

- Created New VP of Compliance, and two Compliance and Training Specialist Positions (February 2022)

Develop Compliance Calendar

- In process in coordination with Partners (March 2022)

Execute Immediate Compliance Needs - IHA Lead: Crystal Coleman

LIHTC Report

- Initial Submission Complete (January 2022)
- Corrections Underway (March 2022)

Community Engagement - Assessment Stage

Activities, Progress, and Next Steps

Question: What Feedback are Residents Providing?
Steps to be Taken to Answer Question:
Resident Listening Sessions - IHA Lead: Marcia Lewis Scheduling - March 2022 Property Manager Input - IHA Lead: Chris Walsh Complete - January/February 2022
Answers:
TBD

Question: What Partner Organizations Does IHA Need to Reestablish or Strengthen?
Resident Services; Continuum of Care; Landlords; Community Development Corporations; Investors; Government Partners; Volunteer Organizations; Contractors
Steps to be Taken to Answer Question:
Senior Team Input - IHA Lead: Marcia Lewis/Chris Walsh Initial Assessment Complete - February 2022
Answers:
Initial List in Appendix C

Community Engagement - Implementation Stage

Activities, Progress, and Next Steps

Establish Regular Two-Way Communication Channels with Residents - IHA Lead: Karen Washington

Re-establish Resident Relations Function

- New Director of Resident Relations Hired (February 2022)
- Landlord and Resident Relations Coordinator Hired (February 2022)
- Resident Relations Plan in Development (Target Date: March 2022)

Client-by-Client Status Update Process - IHA Lead: Jennifer Chrzanowski

- Process in Pilot (March 2022)

Lay Groundwork for Long-Term Strategic Plan - IHA Lead: Chris Walsh

- Share Monthly Updates to “Moving Forward” Transition Plan with Stakeholders (Ongoing)

Programmatic Success Organization - Assessment Stage

Activities, Progress, and Next Steps

Question: What New and Updated Policies, SOPs, Forms, Training, etc. do we Need?
Steps to be Taken to Answer Question:
Operations Team Input - IHA Lead: Chris Walsh Complete - February 2022
Answers:
Many: See Following Page

Programmatic Success Organization - Implementation Stage

Activities, Progress, and Next Steps

Prioritize, Update, Train - IHA Lead: Various

A significant list of opportunities for programmatic organizational improvements have been identified with the IHA Senior Team. A number of items have been flagged for immediate action, and others will be prioritized according to staff capacity.

Immediate Priorities:

Maintenance Work Order Assignment Process - IHA Lead: Molly Morgano

- Process in Pilot (March 2022)

Board of Health Citation Work Plan - IHA Lead: Jennifer Chrzanowski

- Process in Pilot (February 2022)

Client-by-Client Status Update Process - IHA Lead: Jennifer Chrzanowski

- Process in Pilot (March 2022)

Lease Violation Process - IHA Lead: Chris Walsh

- Kickoff (March 2022)

Rent Collection Follow Up - IHA Lead: Francine Jones

- Kickoff (March 2022)

Additional Actions:

Create IT Equipment Log; Update Credit Card Expense Process; PBRA Reporting Processes; Preventative Maintenance Plan; Vehicle Use Policy; Zero Income Form Update; HCV Mailboxes and Phone Line Clarity

Appendices

Appendix A

Asset Management Get Healthy Plan

To varying degrees, IHA properties have had a history of challenges that have collectively led to poor compliance, lackluster financial performance, disappointing resident experience, and correspondingly low scores on HUD assessments.

The below plan is intended to address these issues. IHA will provide an update on progress against this plan on a monthly basis.

Short-Term Push

IHA will identify select areas necessary to make short-term pushes in order to enable the rest of this Get Healthy Plan.

Finance

Financial Assessment

IHA is utilizing HUD Technical Assistance to better understand the financial situation overall and at each property. A few explicit goals of this assessment are to establish more transparent budget development and budget execution processes and to identify where funding is available to hire more property management staff.

Property Budget Review

Each IHA Property will review budget versus actuals on a monthly basis to identify unexpected variances and areas for improvement. Initially, reviews will be focused on refining forecasts.

Contract Assessment

IHA is creating a master list of our contracts and assessing potential cost-saving benefits of other strategies including group purchasing, shared services, in-house work, etc.

Staffing

Staffing Level Assessment

In order to understand industry standards for the number of property managers and maintenance staff that are required for our properties, IHA is conducting a survey of peer organizations to determine appropriate staffing level goals. This information combined with available funding will determine hiring.

Regular On-Site Presence

IHA will assign at least one property manager and one maintenance person and one security officer to each property. While they may need to leave to address issues at other properties, they will meet each week on-site to discuss priorities. During this time, maintenance and security staff will alert property management to any suspected vacant units to avoid long-term abandoned units.

Resident Relations

IHA is establishing a new Resident Relation team to connect tenants with community resources, maintain a physical presence on each property, and create tenant education programming.

Compliance and Training

IHA is increasing the number of staff working on compliance and creating a new training function for this division.

Performance Plans

Every IHA employee will be on a performance plan to clearly outline their work.

Third Party Management

Where necessary, IHA is considering temporary third-party management for select properties. Such contracts will be based on performance incentives and will utilize IHA staff where possible.

Monthly Team Meetings

IHA will hold a monthly meeting with all property managers, maintenance staff, security personnel, and the new resident relations team to identify global issues across the properties. Among other items, a monthly report will be shared at this team meeting.

Process

Monthly Reporting

IHA will develop a monthly report to display key data points by property. The report will mature over time, but at the very least it will always contain basic information on occupancy, outstanding maintenance requests, rent collection, and annual recertifications.

Appropriate sections of the report will be shared monthly with community stakeholders.

Community Partner Engagement

In order to provide more timely responses to stakeholders who assist large number of IHA clients in ensuring the availability of quality housing, we will establish a process to ensure timely responses to these stakeholders.

Work Order Tracking

IHA will ensure that all requested work orders are submitted into the official system and closed when complete.

Preventative Maintenance

IHA will develop a preventative maintenance plan to identify high-cost issues that can be avoided.

Standard Operating Procedures

IHA will prioritize and implement standard operating procedures for property management. Top priorities include items such as Rent Collection and Lease Enforcement.

Contract Monitoring

IHA's finance team is establishing standardized protocols around contract monitoring to include authorization that work was completed satisfactorily and that payment should be made. IHA is creating a new position to monitor maintenance, capital improvement, and other facility-related contract work specifically.

Appendix B

Section 8 Improvement Plan

The Section 8 programs run by IHA have room for improvement in the areas of timely processing, customer responsiveness, and consistency by individual staff members.

The below plan is intended to address these issues. IHA will provide an update on progress against this plan on a monthly basis.

Staffing

Staffing Level Assessment

In order to understand industry standards for the number of caseworkers that are required for our program, IHA is conducting a survey of peer organizations to determine appropriate staffing level goals. This information combined with available funding will determine hiring.

Compliance and Training

IHA is increasing the number of staff working on compliance and creating a new training function for this division. Top priorities will include training on the IT systems and program requirements.

Performance Plans

Every IHA employee will be on a performance plan to clearly outline their work.

Regular Team Meetings

IHA will hold a meeting with all Section 8 staff to identify global issues across the programs. Among other items, the monthly reports will be shared at this team meeting which will be held at least quarterly.

Process

Monthly Reporting

IHA will develop a monthly report to display key data points by program. The report will mature over time, but will likely contain information such as utilization, waitlist, stages in the voucher/lease up process, annual recertifications, attrition rate, and customer service data. Appropriate sections of the report will be shared monthly with HUD.

Community Partner Engagement

In order to provide more timely responses to stakeholders who assist large number of IHA clients in navigating IHA's processes, we will establish a process to ensure timely responses to these stakeholders. IHA will also consider opportunities to partner with community organizations to create new efficiencies in IHA processes.

Policy Updates

Due to a large number of requests for expedited processing, voucher extensions, and hardship exemptions, IHA will work collaboratively with community partners and oversight bodies to update our Section 8 Admin Plan to provide clear and consistent guidance to clients and community stakeholders.

Appendix C

Community Partner List

Adult and Child Health	Freedom Foundation of Indiana	Indy Chamber of Commerce
Allegiant Preparatory Academy	Gennesaret Free Clinic	INHP
Bayview Loans	Hayes Gibson	Intempus
Bloom Project	HealthNet Homeless Initiative Program	John Boner Neighborhood Centers
CAFÉ	Holy Family Shelter	Just Serve
Central Indiana Community Foundation	Horizon House	La Plaza
CHIP	Housing Resource Hub	Lilly Endowment Inc.
CICOA	HVAF	LISC
City of Indianapolis	ICESAHT	Marion County Public Health Department
CLPHA	IHCDA	Marion County Reentry Coalition
Community Solutions	IMPD	Merchants Affordable Housing
Damien Center	Indiana Apartment Association	NAHRO
Eastern Star Church	Indiana Community Action Association	NeighborCare
Econometrica	Indiana Legal Services	PACE
EmployIndy	Indiana Pacers	Partners in Housing
Englewood Permanent Supportive Housing	Indiana University	PHADA
Eskenazi Health	Indianapolis Urban League	Pourhouse
Flanner House		

Purdue University	Smith Solutions	United Healthcare
Purpose of Life Ministries	State of Indiana	United Way of Central Indiana
Quadel	Stifel	University of Indianapolis
Renew Indianapolis	Trinity Financial	West Indianapolis Development Corporation
Salvation Army	U.S. Department of Housing and Urban Development	Wheeler Mission Ministry
Sandra Eskenazi Mental Health Center	U.S. Department of Veterans Affairs	
Second Helpings		

We sincerely apologize if we've mistakenly missed your organization on this initial list. If you have additional organizations that belong here, please reach out to Chris Walsh (cwalsh@indyhousing.org)