



# The Road Home

BUILDING A SAFER,  
STRONGER, SMARTER LOUISIANA

## ***The Road Home*** **Week 35 Situation & Pipeline** **Report**

March 2, 2007





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### **EXECUTIVE SUMMARY**

The Homeowner Assistance Program continued to make progress in the number of applicants seen for the reporting period. During the period, Homeowner Program Advisors completed appointments with 2,645 applicants. The number of benefits calculated increased to 46,403. In addition, 1,775 closings were completed during the period (2,780 total). Homeowners returned 2,954 options letters increasing the number of benefits options selected to a total of 20,688. The option breakdown is shown below.

**Table 1: Homeowner Program Snapshot**

<b>Activity</b>	<b>As of COB February 22</b>	<b>Weekly Activity</b>	<b>As of COB March 1</b>
Number of Applications Recorded	109,671	2,216	111,887
Number of Appointment Letters Mailed	100,712	1,703	102,415
Number of 1 <sup>st</sup> Appointments Scheduled	76,240	1,575	77,815
Number of 1 <sup>st</sup> Appointments Held	80,583	2,757	83,340
Number of 1 <sup>st</sup> Appointments Completed*	78,862	2,645	81,507
Number of Home Evaluations Completed	74,221	2,564	76,785
Number of Benefits Calculated	43,568	2,835	46,403
Number of Benefits Options Letters Sent	38,098	2,688	40,786
<i>Benefit Options Selected:</i>			
➤ <i>Number of Option One</i>	14,904	2,580	17,484
➤ <i>Number of Option Two</i>	2,368	299	2,667
➤ <i>Number of Option Three</i>	462	75	537
Total Benefits Options Selected	17,734	2,954	20,688
Files Transferred for Closing	9,301	2,124	11,425
Closings Scheduled to Occur*		--	345*
Closings Held	1,005	1,775	2,780

\* The number of closings scheduled to occur has been adjusted to reflect the actual number of closings scheduled, but not yet held.

The Rental program continued dissemination and collection of applications (2,347) for Round 1 of the program. The program hosted 4 application workshops throughout the State. Program process, procedures and software continue to be developed and finalized.

The Hazard Mitigation Grant program continues to offer assistance via phone/email (45 cumulative, shadow appointments (168 cumulative), meetings-IMM (3,835 cumulative), and meetings-other (124 cumulative). The program coordinated with Housing Assistance Center staff for integration into Long Term Advisory Sessions and updated printed and electronic collateral materials.



# Weekly Situation & Pipeline Report

## Week 35

February 23 – March 1, 2007

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### State Assistance Required

Small Rental Program: Waiting for Letter of Determination from HUD on duplication of benefit, early start, and incentive program

### Deliverables

**Table 2: Program Deliverables**

Del. ID	Deliverables	Date
00025	Weekly Combined Report	2/27/07
00002	Cash Flow Projection Report	2/27/07
00049	Training program on mitigation measures for Housing Advisors – Initial, periodic, recurring as program policy and implementation determinations are made (Monthly)	2/28/07
00052	Analysis of Facility Use - Closure Schedule (monthly)	2/28/07
00053	Report on Subcontract Activity - OCD Format (monthly)	2/28/07
00054	Report on COI Issues of ICF and Subcontractors (monthly)	2/28/07
00058	Monthly Status Reports on Technical Assistance to Project Sponsors February	2/28/07
00066	IT/IS Security Assessments (Quarterly)	3/1/2007

## HOMEOWNER PROGRAM

Figure 1: Homeowner Assistance Program Pipeline - Applicant Input

	HOMEOWNER PROCESS	CUMULATIVE As of 2/22	CUMULATIVE As of 3/1	INCREASE
APPLICATIONS	ONLINE IN SYSTEM	61,408	62,985	1,577
	MAIL IN SYSTEM	43,766	44,185	419
	PHONE IN SYSTEM	4,497	4,717	220
	<b>APPS IN SYSTEM</b>	<b>109,671</b>	<b>111,887</b>	<b>2,216</b>
APPOINTMENTS	<b>APPS IN SYSTEM</b>	<b>109,671</b>	<b>111,887</b>	<b>2,216</b>
	APPOINTMENT LETTERS SENT	100,712	102,415	1,1703
	APPOINTMENTS SCHEDULED	76,240	77,815	1,575
	APPOINTMENTS COMPLETED	78,862	81,507	2,645

- Figures are cumulative through the period indicated
- 2,216 additional applicants entered the system through applicant online entry, paper transcription, and phone entry

- 2,645 appointments were completed, which allows the applicant to enter into the evaluation/third party verification/calculation process

See the Glossary for explanation of Figure 1 terms



**Figure 2: Homeowner Assistance Program Pipeline - Applicant Processing**

	HOMEOWNER PROCESS	CUMULATIVE As of 2/22	CUMULATIVE As of 3/1	INCREASE
<b>CALCULATIONS</b>	APPLICATIONS IN VERIFICATION	78,862	81,507	2,645
	BENEFITS CALCULATED	43,568	46,403	2,835
	<b>TOTAL</b>	<b>\$3.49 billion</b>	<b>\$3.73 billion</b>	<b>\$.24 b</b>
	<b>AVERAGE</b>	<b>\$81,486</b>	<b>\$81,550</b>	
<b>CLOSINGS</b>	OPTIONS LETTERS SENT	38,098	40,786	2,688
	OPTIONS SELECTED	17,734	20,688	2,954
	FUNDS DISBURSED*	738	1,073	335
	<b>TOTAL</b>	<b>\$49.24 million</b>	<b>\$74.06 million</b>	<b>\$24.82 m</b>
	<b>AVERAGE</b>	<b>\$66,727</b>	<b>\$69,028</b>	

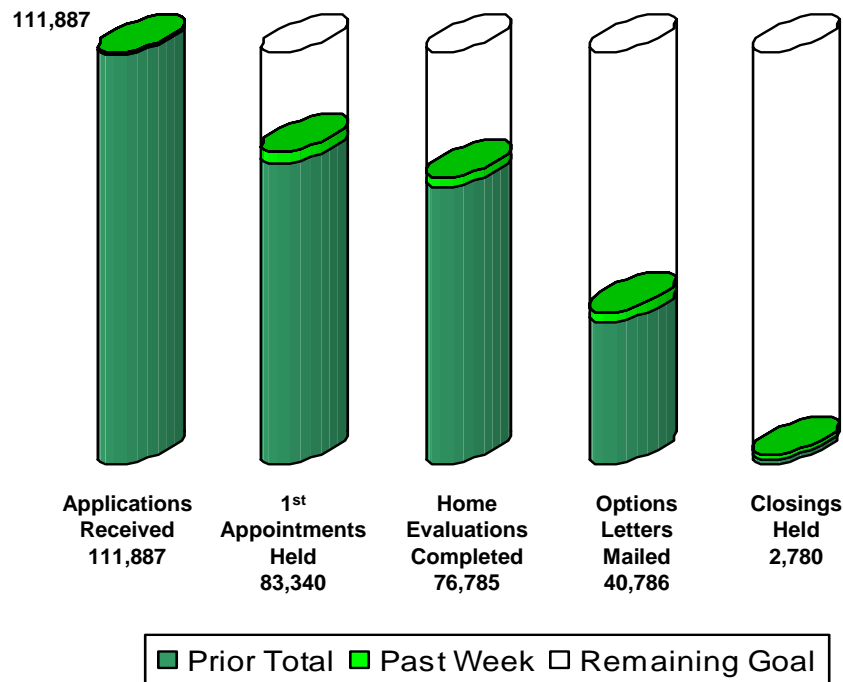
- The \$3.73B total and \$81,550 average award represent maximum benefit if ALL applicants select Option 1 – rebuild in place (the total includes affordable loan calculations, compensation grants, and elevation grants, but does not include ‘zero’ grant awards)

- All closed applicants have selected Option 1

- Applicants’ initial options selection are in Appendix A

- \*Reporting change: Previously reported Closing category has been changed to Funds Disbursed. As of 3/1, 2,780 closings had taken place; with funds disbursed for 1,073 of those closings to the applicants’ lending institutions

**Figure 3: Homeowner Program Progress**



### Housing Assistance Center Activity

- Increased appointment throughput at the 12 Centers by 41%.
  - 2,757 appointments held (83,340 total to date)
    - 806 appointments were missed for the reporting week due to no shows, cancellations, reschedules and duplications. A plan is in place to call all applicants prior to their scheduled appointment to help minimize the number of no-shows.
- Began a soft launch for the Long Term Advisory Session (LTAS) appointments at the Houston, Calcasieu and New Orleans East Housing Assistance Centers on March 1<sup>st</sup>; Phase II implementation for the remaining Centers is scheduled on March 19<sup>th</sup>
  - Training continued throughout the reporting week on software applications utilized during the LTAS appointment
- Finalized plans to deploy Mobile Teams to the Plaquemines Housing Assistance Center in March.
  - Teams are calling applicants with scheduled appointments March 20 – April 15 to reschedule.
- Began scheduling for February 26<sup>th</sup> Atlanta Mobile Team deployment March 19<sup>th</sup> – 28<sup>th</sup>
  - 580 slots were made available to applicants
  - Location – Holiday Inn Select, Atlanta Capital Conference Center, 450 Capital Avenue SW, Atlanta, GA 30312

### Award Calculation Activity

- Calculated an additional 2,835 grant benefits for the period (averaging \$81,550 per grant) for a total of 46,403 grants; 608 'zero' grant amounts and 45,796 'non-zero' or 'positive' grant amounts calculated
- Received 5,086 options selection letters from elderly applicants (see Table 3 for breakdown information)
- Appendix A lists Benefits Options Selection Detail by Parish
- Appendix B lists Benefits Calculated by Damaged Residence Parish

**Table 3: Cumulative Elderly Benefits Options Selection**

Elderly Benefits Options Selected	
Number of Option One	3,918
Number of Option Two	756
Number of Option Three	412
<b>Total Elderly Benefits Options Selected</b>	<b>5,086</b>

**Table 4: Options Selected Activity Including LMI Detail**

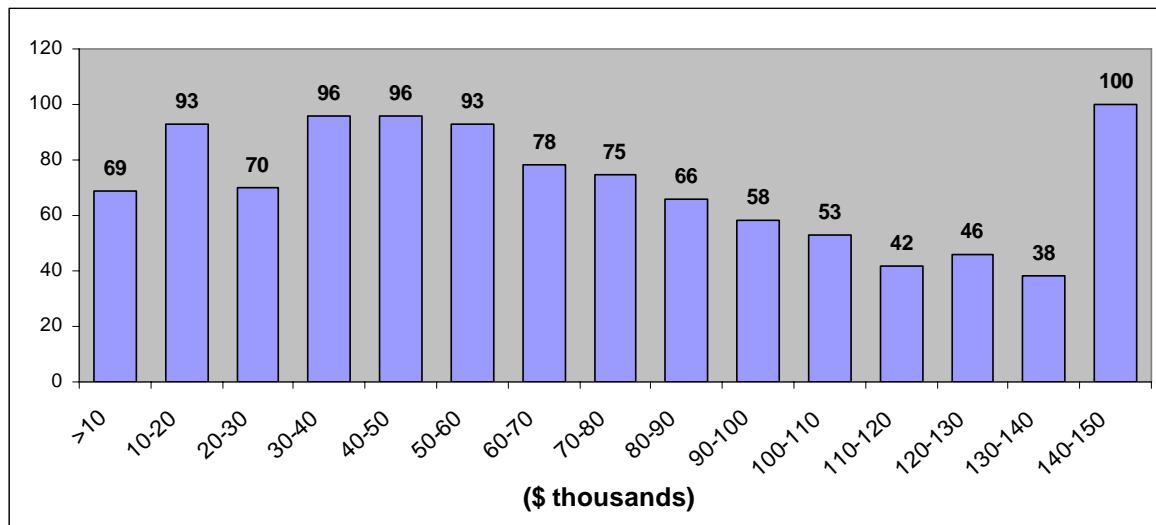
Option Selected	Option 1	Option 2	Option 3	Totals
Number of Options Selected	17,483	2,667	537	20,687
Total \$ in Options Selected	\$1,573,837,090	\$220,615,740	\$ 35,393,110	\$ 1,829,845,940
Comp Grant \$ in Options Selected	\$ 932,737,454	\$158,526,039	\$ 35,393,110	\$ 1,126,656,603
Elev Grant \$ in Options Selected	\$ 360,697,859	\$0	NA	\$360,697,859
ACL \$ in Options Selected	\$ 280,401,777	\$62,089,701	NA	\$342,491,478
Number of Options Selected by LMI	8,397	1,374	257	10,028
Total \$ to LMI	\$ 855,606,484	\$132,504,800	\$ 16,845,639	\$ 1,004,956,923
Comp Grant \$ to LMI	\$ 407,270,975	\$70,415,099	\$ 16,845,639	\$494,531,713
Elev Grant \$ to LMI	\$ 167,933,732	\$0	NA	\$167,933,732
ACL \$ to LMI	\$ 280,401,777	\$62,089,701	NA	\$342,491,478
% of Total Options Selected that are LMI	48%	52%	47%	48%
% of Total \$ to LMI	54%	60%	47%	55%
% of Comp Grant \$ to LMI	44%	44%	NA	44%
% of Elev Grant \$ to LMI	47%	0	NA	47%
% of ACL \$ to LMI	100%	100%	NA	100%

- 29% of LMI applicants with options selected were interviewed at a Housing Assistance Center prior to October 25, 2006, meaning that revised income documentation must be received to verify low-income status
- The income verification process for pre-Oct 25 applicants has so far resulted in a 25% net decrease in the number of applicants considered to be LMI (based on the 1,989 verifications performed to date for this population)
- A total of 1,073 applicants had gone to closing and received their Road Home disbursement as of March 1, 2007. Of these applicants, 249 (23 percent) were documented as LMI
- A total of \$74,067,108 in Homeowner Assistance Program awards were disbursed as of March 1, 2007. Of these disbursements, \$17,193,512 (23 percent) went to applicants documented as LMI

### Data Verification and Closing Activity

- Transferred 2,134 to First American for Closing (See Table 6: Closing Milestones)
- Assisted with the completion of 1,775 closings, (2,780 cumulative, 249 also received affordable compensation loans); race/ethnicity detail given in Table 7: Closings by Race/Ethnicity and Figure 4: Award Size
- Closed 103 Elderly applicants to date for a total of \$7,739,425; all closed applicants have chosen Option 1
- Continued to work with Program participants to accelerate verification processes and increase matches for greater throughput
- Option 1 has been chosen in all closings held
- Appendix C reports Closings by Parish and Zip Code

**Figure 4: Award Size**





# Weekly Situation & Pipeline Report

## Week 35

February 23 – March 1, 2007

**Table 5: Pre-Closing Tracking Report**

<b>ACTIVITY</b>	<b>Fri 2/23</b>	<b>Mon 2/26</b>	<b>Tues 2/27</b>	<b>Wed 2/28</b>	<b>Thurs 3/1</b>	<b>Weekly Total</b>
<b>Benefits Options Letters Received in Pre-Closing</b>	337	775	508	865	273	<b>2,758</b>
<b>Files Transferred to First American for Closing</b>	344	415	451	477	447	<b>2,134</b>
<b>Cumulative Percent of Files on Hold*</b>	55%	53%	49%	49%	52%	

\* Represents the cumulative number of files placed on Hold status, but in process pending additional documents

**Table 6: Closing Milestones**

<b>MILESTONE</b>	<b>Previous Total</b>	<b>1/26- 2/1</b>	<b>2/2- 2/8</b>	<b>2/9- 2/15</b>	<b>2/16- 2/22</b>	<b>2/23- 3/1</b>	<b>Cumulative Total</b>	<b>Five Week Average</b>
<b>File Opened with First American</b>	34,078	4,952	4,285	4,479	3,010	6,040	<b>56,844</b>	<b>4,553</b>
<b>Title Search Completed</b>	15,866	2,526	2,358	2,745	2,181	3,240	<b>28,916</b>	<b>2,610</b>
<b>Title Examination Completed</b>	10,566	1,419	2,097	2,289	1,662	2,467	<b>20,500</b>	<b>1,987</b>
<b>Lender/Lienholder Document Requests Started</b>	973	122	201	605	923	665	<b>3,489</b>	<b>503</b>
<b>File Ready to Schedule for Closing</b>	686	72	123	169	956	1,143	<b>3,149</b>	<b>493</b>

**Table 7: Closings By Race/Ethnicity**

<b>Race</b>	<b># of Closings</b>
Race Not Provided	62
American Indian/Alaska Native	3
American Indian/Alaska Native and White	1
American Indian/Alaskan Native/Black-African American	3
Asian	23
Black/African American	433
Black/African American and White	11
Native Hawaiian/Other Pacific Islander	4
Other Multi-Racial	19
White	514
	<b>1,073</b>

### Home Evaluations (Home Inspection) Activity

**Table 8: Home Evaluation Team Metrics**

<b>ACTIVITY</b>	<b>Prior Total</b>	<b>1/26-2/1</b>	<b>2/2-2/8</b>	<b>2/9-2/15</b>	<b>2/16-2/22</b>	<b>2/23-3/1</b>	<b>Current Total</b>	<b>Five Week Average</b>
<b>Work Orders Submitted by Housing Advisors</b>	67,388*	4,134	2,947*	2,386*	1,466	3,167	81,488	<b>2,820</b>
<b>Work Orders Dispatched</b>	65,960	4,243	3,130*	1,925	2,036	2,946	80,240 <sup>1</sup>	<b>2,856</b>
<b>Evaluations Completed in the Field</b>	60,087	3,462	5,446	2,975	2,251	2,564	76,785	<b>3,340</b>

\* Numbers adjusted from prior week report due to updated reports from contractors

<sup>1</sup> – Difference between work orders received from HACs and dispatched to subcontractors is due to a number awaiting resolution at HACs, awaiting priority code assignment, properties that are condominiums, or were received on 03/01 but are not yet processed.

- Dashboard in WorlTrac software has been tested
- Implemented additional enhancements to WorlTrac QC tool
- Working to address homeowner issues in Issues Tracker
- For evaluation-specific fraud investigations (spec 142), initiated 6, referred 0 to KPMG, and closed 0 (cumulatively 195, 31, and 30, respectively)
- Working to get appropriate holds on mobile homes, condominium, and other non single family homes in JIRA
- Worked with Small Rental Program team to develop draft minimum standards specs for rental units to receive awards
- 5,333 CADs approved and sent to data warehouse

### Call Center Activity

**Table 9: Call Center Metrics**

ACTIVITY	Prior Total	1/26-2/1	2/2-2/8	2/9-2/15	2/16-2/22	2/23-3/1	Current Total	Five Week Average
<b>Calls</b>	404,922	23,955	23,823	22,629	19,592	29,527	<b>524,448</b>	<b>23,905</b>
<b>Calls Abandoned</b>	N/A	1,481	1,307	247	1,304	6,997	<b>N/A</b>	
<b>Average Speed of Answer (minutes)*</b>	-	1.74	1.20	0.25	0.81	3.89	-	-
<b>Applications Requested</b>	31,682	2,221	1,065	932	650	839	<b>37,389</b>	<b>1,141</b>
<b>Online Application Assists</b>	4,021	238	194	167	141	191	<b>4,952</b>	<b>186</b>
<b>Hardcopy Application Assists</b>	1,597	53	58	64	50	60	<b>1,882</b>	<b>57</b>
<b>Phone Applications</b>	3,683	228	223	194	116	220	<b>4,664</b>	<b>196</b>
<b>Spanish Calls</b>	1,140	81	93	84	92	183	<b>1,673</b>	<b>107</b>
<b>Vietnamese Calls</b>	379	67	50	88	92	156	<b>832</b>	<b>91</b>
<b>Appointments Scheduled by Phone</b>	69,050	2,131	1,660	1,526	1,281	1,578	<b>77,226</b>	<b>1,635</b>

\* Data not collected before 1/19

The Call Center has proactively added extra hours throughout the next week to handle the expected call volume due to new letters and the new Rental program. The percentage of abandoned calls was 19%. All agents have been trained to handle benefits options calls so that they can be reassigned to handle temporary surges in call volume.

### Call Center Benefits Option Assistance

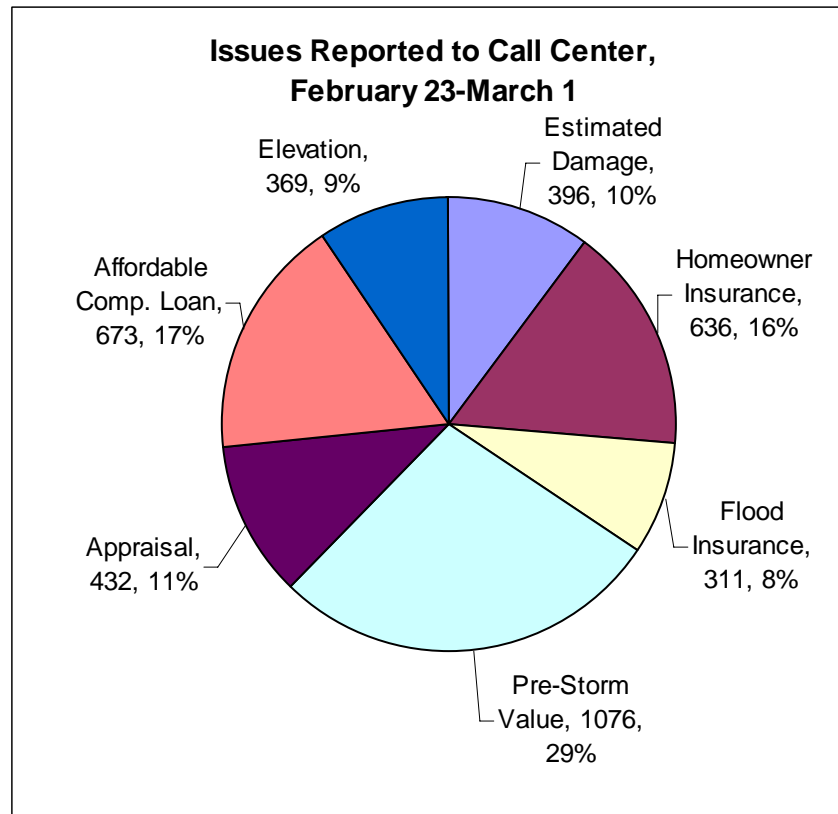
**Table 10: Benefits Options Metrics**

ACTIVITY	Prior Total	1/26-2/1	2/2-2/8	2/9-2/15	2/16-2/22	2/23-3/1	Current Total	Five Week Average
<b>Benefits Options Assistance</b>	32,537	249	368	208	342	440	<b>34,144</b>	<b>352</b>
<b>Benefits Options* Transfer</b>	8,506	3,760	4,276	4,323	3,308	5,234	<b>29,407</b>	<b>4,180</b>

\* Data not collected before 1/12

The Call Center completed 440 Benefits Options Assisted calls (Tier 1) during the reporting period and transferred 5,234 Benefits Options calls to Tier 2. Sixty percent of the issues were resolved; the remaining 40% were entered into the JIRA Issue Tracking Software and referred to Resolution (not all are new resolution cases). Figure 5 provides further information on issues being reported.

**Figure 5: Issues Reported**



### Mailroom/Data Entry Activity

**Table 11: Mailroom/Data Entry Metrics**

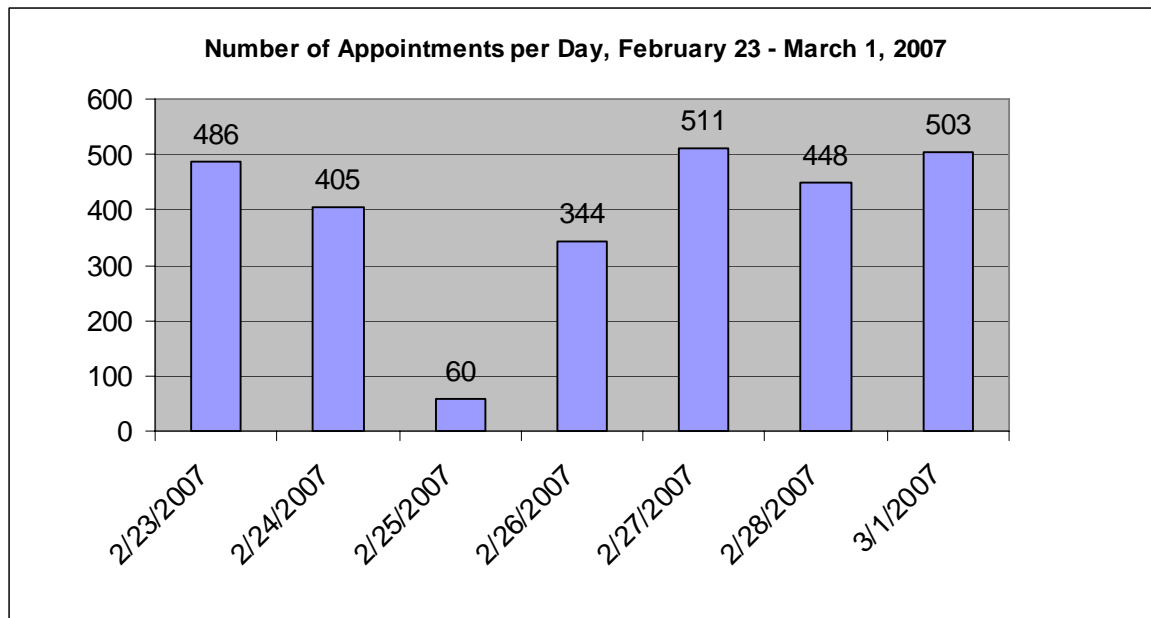
ACTIVITY	Prior Total	1/26-2/1	2/2-2/8	2/9-2/15	2/16-2/22	2/23-3/1	Total	Five Week Average
New paper applications received through mailroom	48,524	517	528	374	452	550	<b>50,945</b>	<b>484</b>
New paper applications entered into batch files for entry into eGrantsPlus	48,118	651	474	459	290	459	<b>50,451</b>	<b>467</b>
New paper applications remaining to be entered into eGrantsPlus	3,315	272	326	241	403	494	<b>494</b>	<b>N/A</b>

- Processed 550 pieces of mail this period (total 50,945 to date; averaging 484 per week); total mail processed for entry into eGrantsPlus is 50,451
- Continued processing current week mail (within a day or two of receipt)

### Housing Assistance Center Appointment Activity

There were 2,757 appointments held for the week, a 41% increase from the prior reporting period. There were 861 appointments missed by applicants for the reporting week.

**Figure 6: Housing Assistance Center Appointments by Day**

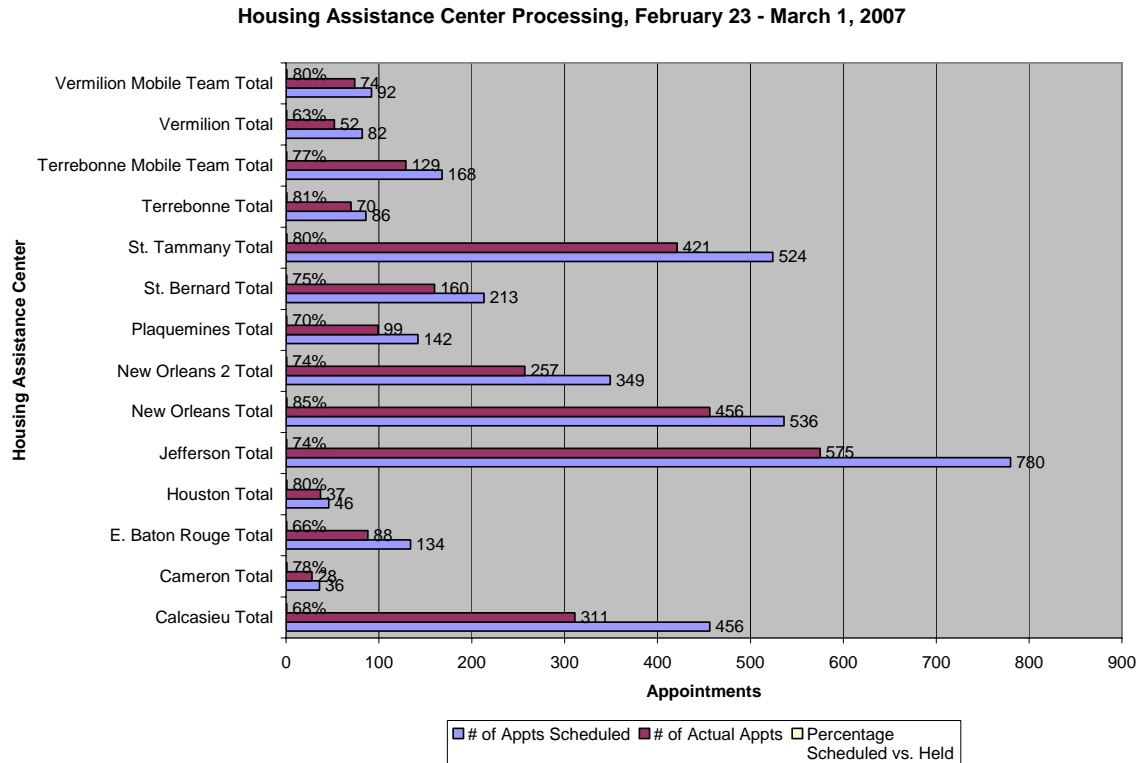


**Table 12: Housing Assistance Center Appointments by Week**

ACTIVITY	Prior Total	1/26-2/1	2/2-2/8	2/9-2/15	2/16-2/22	2/23-3/1	Current Total	Five Week Average
Appointments Held	68,753	4,258	3,155	2,466	1,951	2,757	<b>83,340</b>	<b>2,918</b>
Average Daily Appointments Held		608	455	352	279	393		

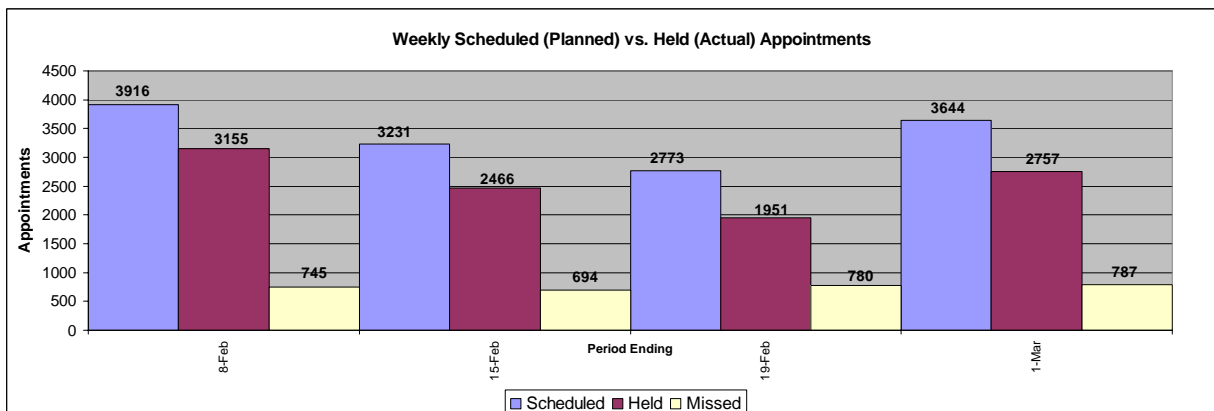
Figure 7 shows the number of appointments scheduled and actual appointments held by Center. The percentage for each Center represents the number of scheduled appointments that were actually held.

**Figure 7: Appointments Scheduled and Held by Center**



Figures 8 and 9 show trends of scheduled versus held appointments and the average number of appointments per day over the current and previous periods. Figure 8 also includes the number of appointments missed.

**Figure 8: Weekly Scheduled and Held Appointments**



**Figure 9: Average Daily Appointments by Period**

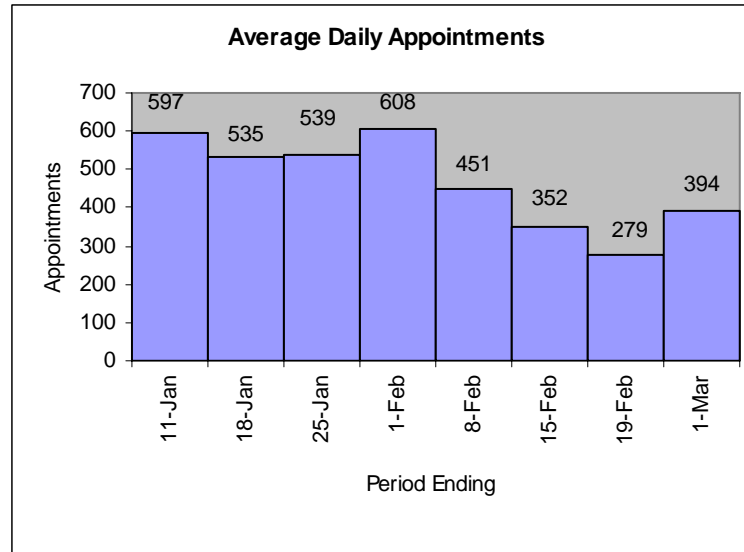


Table 13 shows the next available appointment date by Center, and indicates immediate availability in the St. Bernard, Terrebonne, and Vermillion Centers.

**Table 13: Center Appointment Availability**

#	Center Name	Next Available Appointment	Average # of Days Wait until Appointment <sup>1</sup>
1	East Baton Rouge	March 6, 2007	5
2	New Orleans	March 6, 2007	5
3	Calcasieu	March 6, 2007	5
4	Jefferson	March 16, 2007	15
5	St. Bernard	March 4, 2007	3
6	St. Tammany	March 7, 2007	6
7	Cameron	March 6, 2007	5
8	Plaquemines	March 28, 2007	27
9	Terrebonne	March 3, 2007	2
10	Vermilion	March 3, 2007	2
11	Houston	March 6, 2007	5
12	New Orleans East	March 8, 2007	7

<sup>1</sup>The average number of days wait until appointment is the number of days between the last day of the reporting period (March 1, 2007) and the next available appointment.

### Supporting Function Activity

**General:** In support of Program initiatives, applicants are requested to provide demographic, income, and household data voluntarily. Table 14 shows the breakdown of applicants by race as reported by the applicant. Thirty-three percent designated race as Black, 33% as White. Twenty-nine percent of the applicants available to provide race data chose not to designate race.

**Table 14: Applicant Race and Ethnicity as Reported by Applicant**

Race	Total Applications
American Indian/Alaska Native	398
American Indian/Alaska Native and White	291
American Indian/Alaskan Native/Black-African American	247
Asian	1,476
Asian and White	174
Black/African American	37,033
Black/African American and White	704
Native Hawaiian/Other Pacific Islander	108
Other Multi-Racial	1,701
White	37,210
Race Not Provided	32,545
<b>Total</b>	<b>111,887</b>

## RENTAL PROPERTY PROGRAM

- Received 1,269 Rental program inquiries through the Call Center
- Received 2,347 general pool and 4 nonprofit applications via mail
- Received a total of 59 emails during the reporting period originating from the “Contact Us” email on the Small Rental page of the Road Home website
  - Responded to 49 of these emails, 10 are pending clarifications from rental staff
  - Resolved 11 pending calls from the previous week
- 54,931 general pool and 1,371 nonprofit applications downloaded from the website
- Implemented policy changes including:
  - 80/20 Rule- New Policy: Awards are lesser of 100% of cost to repair/reconstruct the property or the incentive award
  - Vacancy Requirement: Round 1, all units on the property must be vacant for at least 90 days before launch date of Round 1 or November 1, 2006
  - Owner Occupant of 3 and 4 unit properties: To be eligible and first priority, only property owners who meet the following 3 items are eligible to move to front of funding line receive the Owner Occupant Bonus: (1) Lived in a unit on property prior to storm; (2) Property was 3 or 4 unit prior to storm; and (3) Will live in unit on property after repair
- Tested and troubleshot Blue Streak to prepare for data entry
- Continued work on process flow and procedures
- Continued application scanning of all applications received
- Continued review of all paper applications received for completeness
- Continued contacting applicants to advise and documenting information for incomplete applications received
- Met with Blue Streak regarding demonstration and training of Round 1 tool
- Drafted process for staff contact of Owner Occupant transfers



# Weekly Situation & Pipeline Report

## Week 35

February 23 – March 1, 2007

- Conducted 1st Team Building training for Small Rental staff that will recur on a weekly basis

**Table 15: Rental Outreach**

ACTIVITY	1/30- 2/8	2/9- 2/15	2/16- 2/22	2/23- 3/1	Current Total
# of Workshops	8	10	4	4	26

**Table 16: Program Timeline for Round 1**

Program Timeline for Round 1	
January 29 <sup>th</sup>	Program Launched Round 1, Monday, January 29 <sup>th</sup>
January 29 <sup>th</sup>	Application and handbooks are available on <a href="http://www.road2LA.com/rental">www.road2LA.com/rental</a> for download, Call center accepting requests to direct-mail hardcopy application and handbook.
January 30 <sup>th</sup>	Hardcopy applications available in Housing Assistance Centers
January 29-30 <sup>th</sup>	Program Launch of round 1, Monday, January 29 <sup>th</sup> in Lake Charles and Tuesday, January 30 <sup>th</sup> in New Orleans
Week of January 29 <sup>th</sup>	Public launch press and media events (tentatively Jan. 29 <sup>th</sup> and 30 <sup>th</sup> ) and program overview presentations to parish and municipal governments of eligible parishes (tentatively Jan. 31 <sup>st</sup> – Feb 2 <sup>nd</sup> )
February	Workshops conducted at several locations providing application assistance and submittal with trained Advisors, Housing Counselors, Nonprofits, Lenders and other Real Estate Professionals
February 12 <sup>th</sup>	Non-profit Round 1 launched
Week of February 12 <sup>th</sup>	Nonprofit set aside application available for 20-year affordability
**March 15 <sup>th</sup>	General pool round 1 closes
**March 22 <sup>nd</sup>	Non-Profit round 1 closes
Mid March	Begin mailing Conditional Award letters to Property Owners as they meet eligibility and scoring thresholds.
Mid March	Initiate Federal Environmental Review Requirements with Property Owners that receive Conditional Award letters

\*\*Extended length of round openings based upon Joint Legislative Committee request for an additional 15 days

### HAZARD MITIGATION GRANT PROGRAM (HMGP)

- Began coordination with Homeowner program to revise field operations for Mitigation Counselors to integrate with the new long-term advisory concept in the Housing Assistance Centers
- Continued progress on support and integration of mitigation public outreach and education in conjunction with the LSU Agricultural Extension Service – particularly as regards information on the LSU portal
- Designed content for the new Mitigation Home Page
- Revised and updated portal content for the mitigation pages to reflect current FAQs and other knowledge base information
- Completed new policy options for implementation of the IMM HMGP program; Selection of the final policy process awaits approval of the IMM Application by FEMA
- Filled the final position in the Mitigation staff with a Grants Administrator who will direct, supervise, and monitor the process implementation, financial reporting, and disbursement actions required by GOHSEP and FEMA for HMGP management and project delivery
- Completed all Road Home required training by the Mitigation team
- Planned for providing mitigation expertise to Community Outreach
- Established and defined metrics to report on advice and assistance given to applicants (See Table 17)
- Appendix E provides detail of assistance at each center and a glossary of types of Assistance for Table 17

**Table 17: Mitigation Assistance Provided (Cumulative ending 2/23/07)**

Type of Assistance	
Phone Email	45
Meetings –Shadow Appt	168
Meetings IMM	3,835
Meetings Other	124
Training	78
Other Tasks	125

### PROGRAM SUPPORT STATUS

#### LOGISTICS, FACILITIES, & SECURITY

- Initiated Mobile Team deployments to both Erath and Houma; both deployments executed without problem resulting in applicant throughput increase at both locations
- Located and contracted Atlanta Mobile Team deployment site
- Submitted monthly Facility Usage and Closure Report via posting to portal
- Continued planning for subsequent Mobile Team deployments
- Completed draft plan for conduct of ADA compliance training for all Center facility management staff



### **HUMAN RESOURCES**

- Supported Mobile Team deployment with housing advisors
- Continued recruiting and hiring in support of closing, Customer Assistance Center, Rental, and resolutions
- Met with Homeowner program to identify the process to record and report the demand, capacity and usage of Housing Advisors to be produced biweekly and provided to OCD on a Workforce Management Plan

### **POLICY & PLANS**

- Provided FEMA and Insurance Override Guidance and updated Pre-storm Value Guidance to Resolution team, pre-Closing team, and Housing Staff
- Finalized Instructions for Filing an Appeal and distributed to applicants going to Closing. Continued work to finalize Appeals policies and procedures for delivery to the State
- Updated legal documents for closings of Option 1 applicants
- Completed writing eGrants requirements for automating pre-storm value policies
- Released NIMBY tool providing information on the social services available in each of the affected parishes
- Provided on-site support to First American staff at group closings in New Orleans
- Launched Task Force to coordinate Policies and Procedures between Homeowner Program and Small Rental for owner-occupied properties that are eligible for Small Rental
- Streamlined process by which temporary holds are placed on properties that require further investigation to determine property type (necessary to ensure placement in correct Program within Road Home and to ensure application of appropriate evaluation protocol)

### **TRAINING**

- Drafted post-closing action item list for Homeowners – to be included in closing packets

**Table 18: Training Summary**

Training Type	Training Name	Target Audience	Location	Date	Attendees
External	Homeowner Construction Representative Online Training Course	HCRs	Online	As of March 1, 2007	89
Internal	RH Online Core Staff Training	Homeowner Program Staff	Online	As of March 1, 2007	203
Internal	RH Online Advanced Homeowner Assistance Program Training	Homeowner Program Staff	Online	As of March 1, 2007	176
Internal	RH Information Security and Management online training	All Road Home Staff	Online	As of March 1, 2007	498
Internal	HDP Training	Road Home Employees (Rental Program)	New Orleans, LA	February 28 - March 2, 2007	43
Internal	Blue Streak Data Entry Training	Road Home Employees (Call Center and Mail Room)	Customer Assistance Center Baton Rouge, LA	February 28 - March 2, 2008	16

\* Prior reports listed the total number of students registered for the RH Online training to date. This report lists the number of students who have actually passed all of the module exams for each course

## EXTERNAL AFFAIRS

### Outreach

- Participated in Urban Recovery Resource Fair in Houston, Texas
- Planned outreach efforts for the Dallas Texas mobile unit engagement
- Presented homeowner information at YWCA Homeowners Meeting in Atlanta, Georgia
- Met with Journey Home organization representatives in Houston, Texas to further facilitate information dissemination to evacuees
- Presented updated program information at FDIC/Neighborworks training in Baton Rouge
- Held Katrina Aid Today case manager training in Atlanta, Georgia
- Held Georgia Advocacy Center case manager training in Atlanta, Georgia
- Continue to respond to inquiries from outreach events
- Presented updated program information at FDIC/Neighborworks training in Dallas
- Coordinated outreach efforts with ACORN/CAPC
- Entire outreach team deployed to ensure smooth interactions with homeowners during mass closings



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- Sent E-Outreach to legislators and staffers informing them of the program details and details on the affordable compensation loan (ACL)
- Met with FDIC leaders in Atlanta, Georgia to further facilitate Road Home presence
- Enhanced outreach efforts via media interviews in the following venues:
  - APEX Broadcasting, Lafayette-Radio interview
  - KATC TV 3 Lafayette-TV interview
  - Andre Trevigne show on hot 99.5 FM, New Orleans-Radio interview
- Held Small Rental Property Program information and application sessions at
  - Javaology, Atlanta, Georgia
  - United Way, Atlanta, Georgia
  - YWCA, Atlanta, Georgia
  - Iberia Parish Courthouse, New Iberia, Louisiana

## Communications

### **In support of Homeowner program:**

- Shipped Direct Mail Postcard for Registrants/Applicants for Dallas Mobile Team Deployment
- Issued news release for Dallas Mobile Team Deployment Open House and Center Opening to Dallas/Ft. Worth and Louisiana statewide media
- Distributed radio PSAs for Dallas Mobile Team deployment to Dallas/Ft. Worth media
- Scheduled and conducted media appearances for Dallas Mobile Team deployment with Dallas/Ft. Worth media
- Completed long-term advisory services communications plan
- Finalized planning for Dallas Mobile Center open house
- Drafted and issued press release on *Road Home* assignment policy
- Scheduled training for realtor education workshop on assignment policy

### **In support of Rental program:**

- Drafted 100% policy revision news release and sent to OCD for approval
- Revised the marketing outreach strategy for locations outside of Louisiana
- Drafted and issued media advisories for rental outreach workshops in southwest and southeast and Shreveport, LA.
- Promoted radio PSAs for rental outreach workshops in southwest and southeast and Shreveport, LA.
- Scheduled media appearances for rental outreach workshops in southwest and southeast and Shreveport, LA.

## Public Information

- Met and contacted several media outlets in Louisiana to disseminate Program information, correct errant information, and respond to questions regarding the Program, including: The Associated Press, The (Houma) Times, The Louisiana Network, The New Orleans Times-Picayune, Baton Rouge Advocate, WIST-AM,



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- New Orleans, WDSU-TV “Hot Seat,” New Orleans City Business, Gumbo Media, Channel 33, Baton Rouge, WWL-TV-4, and the Daily Iberian
- Attended First American closings in New Orleans, Baton Rouge and Lake Charles for media and community outreach support
  - Served as interpreter as needed
  - Translated and printed Rental, Homeowner and Dallas Mobile fliers
  - Contacted LA media regarding closings and assistance available
  - Contacted DFW media regarding mobile center open house and days of operation
  - Continued researching local Hispanic outlets
  - Contacted and made appointment to visit Catholic Hispanic Apostolate in New Orleans. Will meet with emergency service representative on 3/6
  - Attended Dallas outreach meeting at HQ

## MIS

- Tested Blue Streak data entry module for Small Rental Program
- Tested HDS data entry module for Small Rental Program
- Began regression testing eGrants 4.3 release
- Created and configured a server for Audit tool; Microsoft developers will be loading the application
- Created and configured a server and database the What’s in My Backyard? Tool; the developers of the application have loaded the application and continue internal testing
- Implemented WIMBY application in production

## FRAUD PREVENTION

- Progressed with File Review Plan phases 1 and 3
- Progressed with File Review of identified Applicant outliers
- Met with ICF to discuss the re-evaluation process pertaining to 142 evaluations
- Reported applicant data analytics to ICF on 2/27/07
- Met with the Home Evaluation Team on 2/28/07 to discuss the evaluator data analytics
- Performed investigative background work regarding both evaluator and applicant issues
- Attended QA-QC meeting with State
- Attended meeting with ICF regarding State request for post-closing audit of closing amounts
- Attended Small Rental program anti-fraud measures meeting with others from Road Home and the State
- Held several process walkthroughs with ICF personnel to gain additional understanding of the different process segments
- Prepared control matrices and process discussion documents to build a testing program for interface, database, and segregation of duties processes
- Performed risk assessment and control identification for all portions of the application process

**Table 20: Fraud Prevention Metrics**

ACTIVITY	Prior Totals	1/26-2/1	2/2-2/8	2/9-2/15	2/16-2/22	2/23-3/1	Current Total
Applicant Issues Reported to Anti-Fraud	27	14	3	3	2	1	50
Evaluator Issues Reported to Anti-Fraud	2	-	-	1	-	-	3
Third-Party Issues Reported to Anti-Fraud	7	1	4	1	1	-	14

### QUALITY ASSURANCE AND CONTROL

- Reviewed closing files and made recommendations regarding file handling
- Reviewed 2,669 PDF files of option letters (5% sample) and recommended holding 70 for further review, others were recommended for mailing
- Assisted Rental Program by designing process flow for Round 1 and indicating points for quality checks within the process
- Collected and reviewed Quality Assurance Templates from process owners and began analyzing for quality assurance monitoring

### COMPLIANCE

- Received two subpoenas from HUD OIG for applicant information; continued to work with HUD OIG on several issues
- Attended QAQC and Anti-Fraud meeting with state
- Chaired Attorney General Task Force Meeting on February 28, 2007
- Worked with HUD Review Team on new requests for information
- Continued working with KMPG to develop Anti-Fraud and internal controls to prevent and detect Fraud, Waste, and Abuse within the program
- Continued to develop lines of positive communication with Federal, state, and local law enforcement and administrative officials

### SPECIAL NEEDS ADVISORY TEAM

- Incorporated revisions from executive staff into final draft policy for Policy & Procedures: Referring *Road Home Applicants to Outside Agencies*
- Continued providing support at Housing Assistance Centers through Louisiana Spirit; to date, 460 Road Home staff have received stress management training from Louisiana Spirit
- Met with Louisiana Spirit to finalize implementation plan for regular presence of LA Spirit counselors in the Housing Centers, Call Center, and Headquarters to begin the weeks of the 3/12 and 3/19
- Met with the call Center to discuss training, referral reporting and establishing a Special Needs Liaison with the Resolutions Team



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- Finalizing curriculum and logistics for ADA training for facility managers on March 15
- Provided additional guidance to Communications regarding the Road Home Coloring Book
- Distributed weekly email to Special Needs Liaisons; Coordinated with Liaisons during the week to address issues arising in the Centers such as referrals and interpreters
- Continued developing criteria for Rental program regarding visitability and universal design requirements
- Began developing resources/strategies for staff to ensure applicants with low literacy levels are able to successfully participate in the program

## **APPENDIX A**

**Option Selections of Applicants, by Parish of Damaged Residence** *Note: All Damaged Residence information is as provided by the applicant during the application process. Actual damaged residence information may differ from what the applicant provided. Eligibility information is properly is confirmed during the verification process*

PARISH	Option 1. Keep Your Home	Option 2. Sell, but Stay in Louisiana	Option 3. Sell, and Move out of Louisiana	Total
ACADIA	11	3	-	14
ALLEN	12	4	-	16
ASCENSION	10	1	-	11
ASSUMPTION	4	1	-	5
BEAUREGARD	45	9	-	54
CALCASIEU	796	83	2	881
CAMERON	175	55	2	232
CATAHOULA	1	-	-	1
DE SOTO	-	-	-	0
EAST BATON ROUGE	50	3	-	53
EAST FELICIANA	4	2	-	6
IBERIA	114	10	-	124
IBERVILLE	6	2	-	8
JACKSON	1	-	-	1
JEFFERSON	3145	58	6	3209
JEFFERSON DAVIS	48	4	-	52
LAFAYETTE	7	2	-	9
LAFOURCHE	22	1	1	24



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PARISH	Option 1. Keep Your Home	Option 2. Sell, but Stay in Louisiana	Option 3. Sell, and Move out of Louisiana	Total
LIVINGSTON	19	3	1	23
NATCHITOCHE	1	-	-	1
ORLEANS	8,487	977	310	9774
PLAQUEMINES	290	144	11	445
POINTE COUPEE	1	-	-	1
RAPIDES	1	-	-	1
SABINE	-	1	-	1
SAINT BERNARD	1,509	1,146	183	2838
SAINT CHARLES	38	1	-	39
SAINT HELENA	7	-	-	7
SAINT JAMES	6	-	-	6
SAINT LANDRY	9	3	-	12
SAINT MARTIN	9	2	-	11
SAINT MARY	26	5	-	31
SAINT TAMMANY	1,998	72	17	2087
ST JOHN THE BAPTIST	59	-	-	59
TANGIPAHOA	44	9	-	53
TERREBONNE	197	25	1	223
VERMILION	277	34	2	313
VERNON	2	-	-	2
WASHINGTON	52	7	1	60
WEST BATON ROUGE	1	-	-	1
<b>Totals by Option</b>	<b>17,484</b>	<b>2,667</b>	<b>537</b>	<b>20,688</b>



**APPENDIX B**

**Benefits Calculated by Damaged Residence Parish**

Parish	Number of Calculations
ACADIA	22
ALLEN	30
ASCENSION	17
ASSUMPTION	12
BEAUREGARD	92
CALCASIEU	1,808
CAMERON	813
CATAHOULA	1
DE SOTO	1
EAST BATON ROUGE	74
EAST FELICIANA	8
IBERIA	227
IBERVILLE	18
JACKSON	1
JEFFERSON	6,011
JEFFERSON DAVIS	101
LAFAYETTE	13
LAFOURCHE	42
LIVINGSTON	41
NATCHITOCHE	1
ORLEANS	23,815
OTHER	1
OUACHITA	2
PLAQUEMINES	891
POINTE COUPEE	1
RAPIDES	1
SABINE	2

Parish	Number of Calculations
SAINT BERNARD	6,963
SAINT CHARLES	70
SAINT HELENA	20
SAINT JAMES	13
SAINT LANDRY	14
SAINT MARTIN	18
SAINT MARY	43
SAINT TAMMANY	4,002
ST JOHN THE BAPTIST	89
TANGIPAHOA	82
TERREBONNE	384
VERMILION	539
VERNON	3
WASHINGTON	114
WEST BATON ROUGE	3
<b>Total</b>	<b>46,403</b>



**APPENDIX C**

**Closings by Parish and Zip Code –  
Applicants have received funds**

Parish	Number of Closings
A parish was not provided	1
Allen	2
Calcasieu	89
Cameron	5
East Baton Rouge	1
Iberia	12
Jefferson	293
Jefferson Davis	4
Lafayette	2
Orleans	359
Plaquemines	4
Saint Bernard	79
Saint Charles	5
Saint Mary	1
Saint Tammany	174
St John the Baptist	5
Tangipahoa	1
Terrebonne	9
Vermilion	23
Washington	4
<b>Total</b>	<b>1,073</b>



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### Closings by Zip Code

Zip Code	Number of Closings
70001	20
70002	18
70003	32
70005	13
70006	27
70032	15
70036	2
70037	4
70043	20
70047	1
70053	5
70056	22
70057	1
70058	37
70059	1
70062	4
70065	51
70067	3
70068	5
70070	2
70072	39
70075	8
70084	1
70085	14
70087	1
70092	21

Zip Code	Number of Closings
70094	14
70095	1
70112	1
70113	4
70114	5
70115	14
70117	23
70118	18
70119	21
70121	2
70122	59
70123	4
70124	49
70125	15
70126	38
70127	38
70128	33
70129	19
70130	2
70131	18
70344	3
70363	4
70397	2
70403	1
70427	3
70433	3

Zip Code	Number of Closings
70435	2
70438	1
70445	5
70447	1
70448	5
70458	43
70460	17
70461	97
70471	2
70503	1
70510	10
70528	3
70529	1
70533	11
70538	1
70546	2
70548	1
70560	10
70601	33
70605	13
70607	14
70611	5
70615	6
70630	2
70632	1
70633	2



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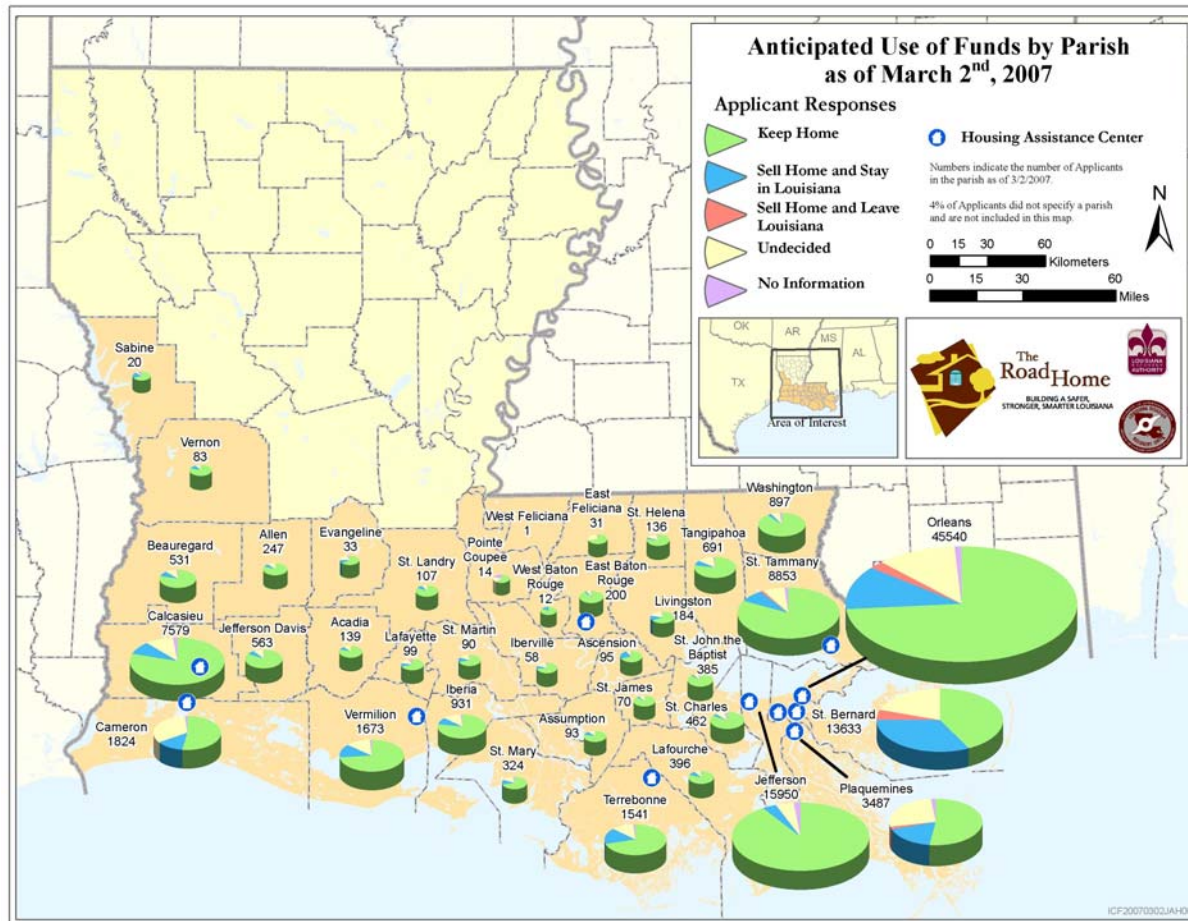
## Week 35

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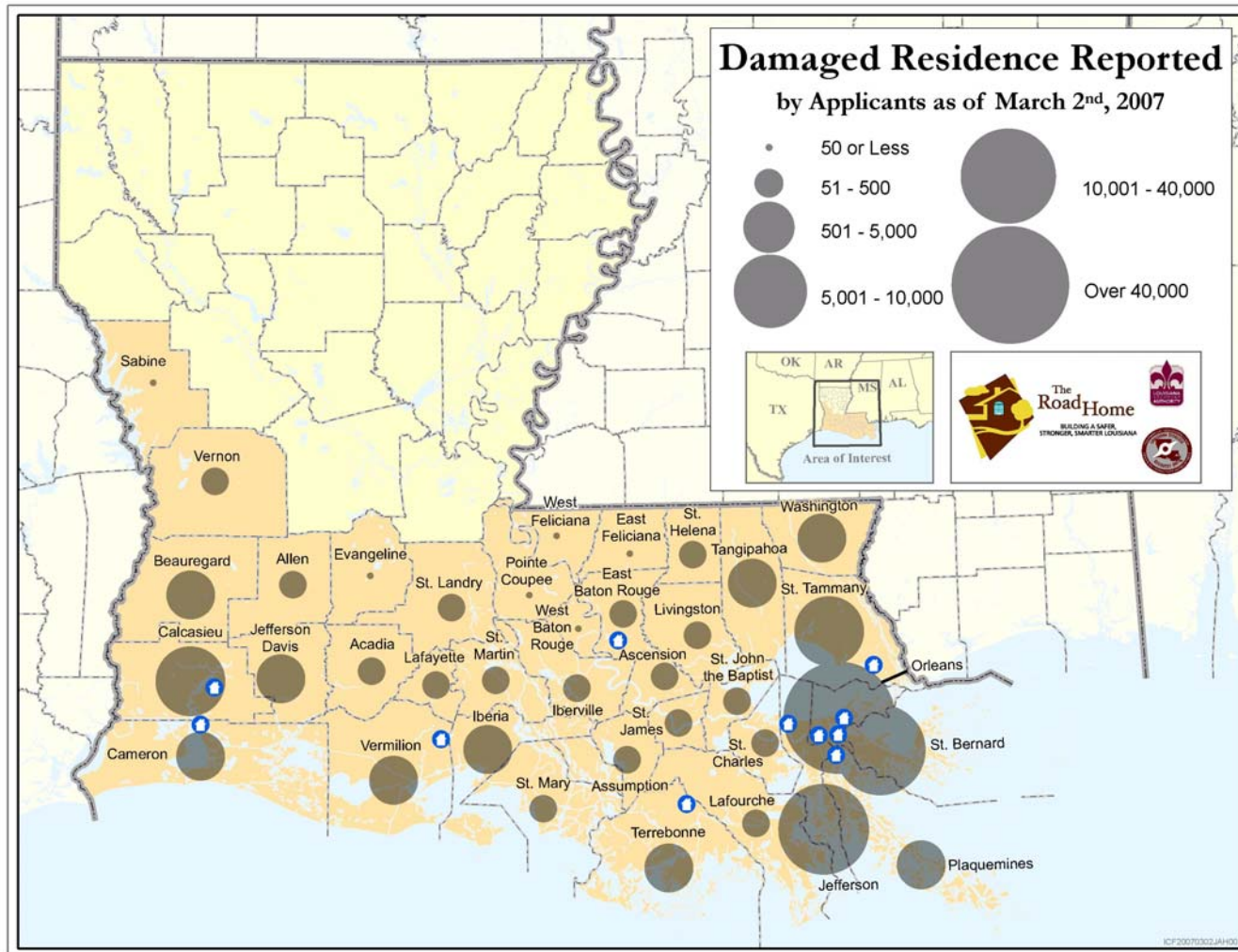
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Zip Code	Number of Closings
70645	1
70647	3
70648	1
70655	1
70663	5
70665	6
70669	4
70814	1
Zip Code not provided	1
<b>Total</b>	<b>1,073</b>

### APPENDIX D



### APPENDIX E





**APPENDIX F**

**Mitigation Assistance by Housing Assistance Center**

Housing Assistance Center	Phone/Email	Meetings-Shadow Appt.	Meetings-IMM	Meetings-Other	Training	Other Tasks
Cameron	-	15	71	15	14	29
Calcasieu	-	5	25	10	-	5
East Baton Rouge	2	83	87	24	9	64
Jefferson	13	12	1,293	18	14	5
New Orleans East	17	-	104	-	-	-
Orleans	2	10	673	31	29	10
Plaquemines	-	-	-	-	-	-
St. Bernard	4	1	112	10	4	1
St. Tammany	7	42	1,422	3	8	2
Vermilion	-	-	48	13	-	9
<b>Total</b>	<b>45</b>	<b>168</b>	<b>3,835</b>	<b>124</b>	<b>78</b>	<b>125</b>

**Phone/Email** Responding to questions from applicants or advisors over the phone or email regarding mitigation.

**Meetings-Shadow Appts** Participating with Housing Advisor's Meetings with applicants.

**Meetings-IMM** Conversation applicants or housing advisors specifically related to Mitigation Measures. This includes presentations to applicants in the waiting rooms, in Mitigation offices, or other settings.

**Meetings-Other** Road Home related meetings not specifically for discussing mitigation (i.e., center staff meetings, training/orientations, and Housing Advisor Team integration of Mitigation staff into center functions).

**Training** Attending required training including Road Home training online.

**Other Tasks** Working on tasks (i.e., Power Point presentations for community outreach) or for support tasks not fitting into the other categories.

## **GLOSSARY**

### **Pipeline Diagram Terms (Figures 1 and 2)**

#### **APPLICATIONS**

**Online in System** represents the cumulative number of applications in the system for applications submitted online.

**Mail in System** represents the cumulative number of applications in the system for hard copy applications submitted via mail.

**Phone in System** represents the cumulative number of applications in the system for applications taken over the phone.

**Total in System** represents the cumulative number of applications in the system for applications submitted online, via mail, and over the phone.

#### **APPOINTMENTS**

**Appointment Letters Sent** represents the cumulative number of letters sent to applicants asking them to call and schedule an appointment. Not all applicants will receive appointment letters because they may be ineligible or may have already scheduled their appointment over the phone. Appointment letters are sent in batches twice a week.

**Appointments Scheduled** represents the cumulative number of appointments scheduled to date.

**Appointments Completed** represents the cumulative number of appointments completed at Housing Assistance Centers where advisors submitted the applicants' completed applications.

#### **CALCULATIONS**

**Applications in Verification** represents the cumulative number of applicants whose application data is being verified to determine eligibility and basis for calculation of benefits.

**Benefits Calculated** represents the cumulative number of applications for which eligibility has been determined and benefits have been calculated for the various possible options.

#### **CLOSINGS**

**Options Letters Sent** represents the cumulative number of applicants who have been sent a benefit options letter noting their respective benefit options.

**Options Selected** represents the cumulative number of applicants who have replied to the options letter and selected their benefit option.

**Closed** represents the cumulative number of applicants who have gone through the closing process and whose funds have been disbursed.