



**The Housing Conference**  
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## Effective Wait List Management

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## Section 8 HCV/PBV & Public Housing Wait List Management

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- Wait List Preferences
- The Application Process
- Managing the Wait List
- Innovative Management

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## Wait List Preferences

- Considerations before Applying Preferences
  - Local Need
  - Impacts of Preferences on Admissions
- Examples of Local Preferences
  - Local Residency Preference & PHA Jurisdiction
  - Fair Housing Requirements
- Adopting a Local Preference
  - Updating PHA Policy/Administrative Plan
- Change in Preference Status
  - Denial of a Preference
- Audit Trail – SEMAP Indicator I

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## The Application Process

- **One Step or Two Step Application-Taking Process**
  - HUD Requirements (Admin Plan & ACOP)
  - Pre-Application v. Full-Application
  - Expected Wait Time
- **Type of Wait List**
  - Site-Based v. Community Based List (Public Housing)
  - One/Merged List or Separate Lists
- **Opening the List & Accepting Applications**
  - Advertising & Outreach to Families
  - How and Where to Apply
  - When to Close to the List
  - Re-Opening the List
  - Fair Housing Requirements
- **Placement on the List**
  - Written Notice to Ineligible Families
  - Notice to Families Placed on the List – What to Include
  - System for Placement: Preference – Lottery/Date & Time
  - Occupancy Standards: Unit Type and Size (Public Housing)

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## Managing the Wait List

- **Analyzing the Waiting List**
  - Enough Applicants to ensure Full Utilization/Occupancy
  - Broad Range of Social & Economic Characteristics
  - Are Families Determined 'Least Likely to Apply' Represented
  - Ability to Comply with Income-Targeting Requirements
- **Permanent Record of Actions Taken on an Application – Audit Trail**
  - Change to Application
  - Change of Status on the List
  - Determinations of Eligibility
  - Notes on Contact with an Applicant (date, nature and type of contact, action taken)
- **Selecting From the List**
  - Notification to the Applicant

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## Innovative Wait List Management Practices

- Consolidated/Centralized Wait Lists
- Update/Purging Procedures

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## Consolidated Waiting Lists

- **Benefits of Consolidated Waiting Lists**
  - Simplifies Application Process
  - Reduces Duplication of Efforts
  - Saves Time & Money
  - Sharing Information
  - Increases Housing Opportunities for Applicants
  - Keep PHA Preferences and Local Control
- **Examples of Consolidated Lists (Currently Section 8 Only)**
  - Massachusetts, Maine, Rhode Island
  - Recommended by PHADA & CBPP
- **Create a Consolidated List**
  - Establish Interested Agencies (typically thru an association)
  - Advertise, Create Single Application & Administrative Plan/ Admissions and Continued Occupancy Policy Amendment
  - Opportunity for More Agencies to Join

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## Updating & Wait List Health

- **Why Update the List?**
  - Prevent Delays in Leasing/Admissions
  - Increase Occupancy/Utilization
  - Ensure Applicant's Proper Place on the List
- **When to Send an Update?**
- **Who get's an Update?**
  - Local Decision – Analyze the List
  - Fair Housing Requirements
- **What to Send to Applicants?**
- **How to Send an Update?**
- **Removing Applicants**
  - No Response, Mail Returned, Ineligible
  - PHA Policy/Administrative Plan
  - Applicant Appeals for Reinstatement
  - Fair Housing Requirements

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## Wait List Management Assistance

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- Wait List Management Service  
GoSection8.com
- Administrative Plan Drafting  
Nan McKay & Assoc.

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