


## Operational Models for Workforce Management

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## Operational Structure



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## Organizational Structure

- **Structure** is the reason why we refer to businesses as “organizations.”
- Every organization should operate with a well defined organizational structure.



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## Different Types of Structures

- **Functional:** Activities are organized by functions performed. Common departments such as Human Resources, accounting and purchasing are organized by separating each of these areas and managing them independently of the others.
- **Divisional:** Activities are organized around geographical, market, or product and service groups.
  - A PHA that is a "Department" of a local government entity is part of a larger Divisional Structure.
- **Case Management:** Activities are organized in order to meet multiple needs through a single point of access.
- **Matrix:** Employees have multiple bosses and reporting lines.



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## Steps to Operational Model

1. Identify Major PHA Activities
2. Quantify the Activities/Demands
3. Perform Time Studies on each Activity
4. Identify Staffing Requirements
5. Identify your Target Rate of Influence (a.k.a. Span of Control)
6. Establish Organizational Priorities



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## Step 1: Identify Major Activities



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## Identify Activities

- Housing Choice Voucher Program
  - Annual Reexaminations
  - Interim Reexaminations
  - Change of Dwellings/Moves
  - Terminations
  - Hearings/Reviews
  - Inspections
  - Walk-ins
  - Call-Volume



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## Identify Major PHA Activities

- Public Housing Program
  - All the HCV Activities plus:
    - Work-Orders
    - Unit turn overs
    - Lease Enforcement
    - Rent Collection
    - Evictions
- Special Programs
  - FSS
  - VASH
  - FUP



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## Step 2: Quantify Business Demands

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### Quantify Business Demand

- Annual Success Rate:
  - How many annuals you expect to complete
    - Active Families – Attrition Rate
- Interim Rate
  - How many interims you expect to complete per active family
    - Active families X Avg. Interim Per Family Per Year (PPFY)
- Rent Increase Rate
  - How many Rent Increases you expect to complete per active family
    - Active families X Avg. Rent Increase PFPY




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### Quantify Business Demand

- Change of Dwelling/Move Rate
  - How many families you expect to move each year
    - Active Families X Avg moves PFPY
- Inspection Rate
  - How many Inspection Instances you anticipate per active family
    - Pass Rate
    - Abatement Rate
    - EOP Rate
- Walk-in/Visitor Rate
  - How many walk-ins/visitors do you anticipate PFPY
    - Active families X Avg. Walk-ins PFPY




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### Additional Business Activities

- Call Volume
  - Per Business Activity
- Hearings PFPY
- Fraud Investigations PFPY
- Eligibility/Leasing Rate
- Port/In Port Out Rate
- New Vendor or Change of Ownerships




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**Step 3: Time Studies**


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**Time Study**

- **Time study** is a structured process of directly observing and measuring human work using a **timing** device or process to establish the time required for completion of the work by a **qualified worker** when working at a defined level of performance.
- Time Studies consist of:
  - **analysis** of the work into small, easily-measurable components or elements
  - **measurement** of those components and
  - **synthesis** from those measured components to arrive at a time for the complete job.

<https://www.ims-productivity.com/page.cfm/content/Time-Study/>




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**HUD Admin Fee Study**

Exhibit 4-5. Example of Mean Hours per Voucher Under Lease per Year Translated to FTEs for 1,000-Unit HCV Program

	Hours per Voucher per Year	Total Hours per Year	FTEs
Intake, eligibility, and lease-up	2.3	2,302	1.4
Ongoing occupancy	6.8	6,815	4
Inspections	2.2	2,182	1.3
Monitoring and supervisory	2.2	2,196	1.3
Supportive services	0.3	275	0.2
<b>Total</b>	<b>13.8</b>	<b>13,770</b>	<b>8.1</b>

[https://www.huduser.gov/portal/publications/pdf/AdminFeeStudy\\_2015.pdf](https://www.huduser.gov/portal/publications/pdf/AdminFeeStudy_2015.pdf)




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## Time Study

- Housing Choice Voucher Program
  - Annual Reexaminations – 2hrs
  - Interim Reexaminations – 45 mins
  - Change of Dwellings/Moves – 1hr
  - Terminations – 45 mins
  - Hearings/Reviews – 2hrs
  - Inspections – 30 mins
  - Walk-ins – 20 mins
  - Call-Volume – 10 mins




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## Sample Time Study

AVAILABLE WORK HOURS	
Variable	Qty/Result
Total Hours Per FTE	2080
Holiday Hours	88
Personal/Vacation Hours	120
Training/Meetings	40
Sick-Time Per Year	40
Total On-Site Hours	1792
Productive Hours Per Day	6.5
Total Productive Hours	1456
Total Productive Mins	87360




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## Sample Time Study

New Admission/Move Transactions	Reception
Review of COD/New Admit File - mins	52723
Prepare Voucher and Packet - mins	2
Briefing (groups of 20, 2hr each session) - mins	105440
General Filing - mins	135743
Eligibility - Mins	121
RR Certification and Negotiate Rent - Mins	24287
Request Inspection	5
Review Inspection Report/Follow-up - Mins	131433
Schedule HAP Signing - Mins	202350
HAP Signing - Mins	139
Total Minutes Required - Mins	14540
	Minutes Per Walk-In
	12
	Minutes Needed
	145490
	Hours Needed
	2424.833333
	FTE Needed
	1.67
	Total FTE
	4.26
	BETA Desk
	4800
	Minutes
	15
	Total Minutes Required
	72000
	Hours Needed
	1200
	FTE Needed
	0.82
	Total FTE Needed
	5.09

ANNUAL REEXAMINATIONS	
Pre-Review and Preparation - Mins	15
Interview - Mins	30
Request Missing Documents/3rd Party - Mins	10
Receive and Review Missing docs	35
Processing Time - Mins	30
Total Clerk Minutes	110
Total HSI Minutes	105
Total FTE Hours	120




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## Step 4: Identify Staffing Requirements


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## Identify Requirements for Front Line Staff

Vouchers:	500						
Mins per FTE	87360						
	Rate	Time	Annual Transactions	Monthly	Mins Required	FTE	
Annuals	97%	120	485	40.4	58200	<b>0.67</b>	1.04
Interims	50%	45	250	20.8	11250	<b>0.13</b>	
COD	40%	106	200	16.7	21200	<b>0.24</b>	
Terminations	3%	45	15	1.3	675	0.01	
Hearings Reviews	3%	120	15	1.3	1800	0.02	
Inspections	175%	30	875	72.9	26250	0.30	
Walk-Ins	200%	20	1000	83.3	20000	0.23	
Call Volume	1200%	5	6000	500.0	30000	0.34	
Front Line Staff						<b>1.94</b>	

Does not include Management, Supervision, and other support function such as: IT, Procurement, Human Resources, ect.




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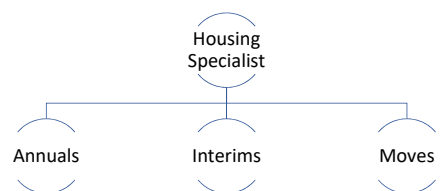
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## 500 Vouchers



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graph TD
    HS((Housing Specialist)) --- A((Annuals))
    HS --- I((Interims))
    HS --- M((Moves))
            
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## 1,500 Vouchers @ 100% Interim Rate

Vouchers:	1500					
Mins per FTE	87360					
	Rate	Time	Annual Transactions	Monthly	Mins Required	FTE
Annuals	97%	120	1455	121.3	174600	2.00
Interims	100%	45	1500	125.0	67500	0.77
COD	40%	106	600	50.0	63600	0.73
Terminations	3%	45	45	3.8	2025	0.02
Hearings/Reviews	3%	120	45	3.8	5400	0.06
Inspections	175%	30	2625	218.8	78750	0.90
Walk-ins	200%	20	3000	250.0	60000	0.69
Call Volume	1200%	5	18000	1500.0	90000	1.03
Front Line Staff						941875 6.20

Does not include Management, Supervision, and other support function such as: IT, Procurement, Human Resources, ect.




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## 5000 Vouchers

Vouchers:	5500					
Mins per FTE	87360					
	Rate	Time	Annual Transactions	Monthly	Mins Required	FTE
Annuals	97%	120	5335	444.6	640200	7.33
Interims	50%	45	2750	229.2	123750	1.42
COD	40%	106	2200	183.3	233200	2.67
Terminations	3%	45	165	13.8	7425	0.08
Hearings/Reviews	3%	120	165	13.8	19800	0.23
Inspections	175%	30	9625	802.1	288750	3.31
Walk-ins	200%	20	11000	916.7	220000	2.52
Call Volume	1200%	5	66000	5500.0	330000	3.78
Front Line Staff						1869125 21.33

Does not include Management, Supervision, and other support function such as: IT, Procurement, Human Resources, ect.




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## Functional vs Case Management




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## Case Management

<p>■ <b>Pros:</b></p> <ul style="list-style-type: none"> <li>■ Families have a consistent “case worker”</li> <li>■ Minimal to no handoffs</li> <li>■ Builds skilled staff</li> <li>■ Reporting is easier</li> </ul>	<p>■ <b>Cons:</b></p> <ul style="list-style-type: none"> <li>■ Backlogs can create fast</li> <li>■ Takes longer to train and specialize staff</li> <li>■ Working priorities in the hands of the specialist.</li> </ul>
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## Functional

<p>■ <b>Pros:</b></p> <ul style="list-style-type: none"> <li>■ Faster to train and onboard staff</li> <li>■ Better ability to create a “career path” for staff</li> <li>■ Errors are isolated and easier to identify.</li> <li>■ Rapid response to changing business needs.</li> </ul>	<p>■ <b>Cons:</b></p> <ul style="list-style-type: none"> <li>■ Families do not have a consistent “case worker”</li> <li>■ Tracking and handoffs can be difficult to manage</li> <li>■ Can create working “silos”</li> </ul>
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## Functional

<p>■ <b>Pros:</b></p> <ul style="list-style-type: none"> <li>■ Faster to train and onboard staff</li> <li>■ Better ability to create a “career path” for staff</li> <li>■ Errors are isolated and easier to identify.</li> <li>■ Rapid response to changing business needs.</li> </ul>	<p>■ <b>Cons:</b></p> <ul style="list-style-type: none"> <li>■ Families do not have a consistent “case worker”</li> <li>■ Tracking and handoffs can be difficult to manage</li> <li>■ Can create working “silos”</li> </ul>
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## Functional or Case

- 1. Which approach permits the maximum use of technical knowledge?
- 2. Which provides the most efficient utilization of space and equipment?
- 3. Which provides the best hope of obtaining the required control and coordination?



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## Target Rate of Influence



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## Span of Influence

- The commonly accepted definition of span of control is: "the number of subordinates directly reporting to a leader/manager."
  - Outdated and Destructive
- Span of Influence or Constituency Management:
  - more inclusive.
  - Moves from rigid structures to loose collaborative networks,
  - Thinking "open source" and not "proprietary".



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## Span of Influence

- Regardless of the level of intelligence, experience, or energy, one person cannot possibly know the ramifications of every decision to be made; therefore, instead of authority, which comes from the span of control, leaders need to look at **accountability**. The span of accountability gives the leader a sphere of influence.
- In sum, leaders can lead without authority through strong relationships, shared accountability, and ability to collaborate effectively.




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## Direct Reports

- When a manager supervises a large number of employees, s/he often has little time to **align** activities, **influence** staff (coach and train), and **monitor** the quality of how activities are executed.
- When a manager supervises a small number of employees, s/he may be underutilized which may be used as an opportunity. Less can be more.
- Deloitte Survey from 2016 reflects a **9.7 average** direct reports for US companies.




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## Organizational Priorities




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## Organizational Priorities

- Example of organizational priorities:
  - SEMAP High Performer
  - Zero Audit Findings
  - Decrease Interim Processing Times
  - Timely Annuals
  - Increase Customer Service
  - Increase Leasing




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## Workforce Management




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## Workforce Management



Workforce management (WFM) is an integrated set of processes that an organization uses to optimize the productivity of its employees.

WFM involves effectively forecasting labor requirements and creating and managing staff schedules to accomplish a particular task on a day-to-day and hour-to-hour basis.




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## Workforce Management

- The process includes all the activities needed to maintain a productive workforce, such as:
  - human resource management,
  - performance and training management,
  - data collection,
  - recruiting,
  - budgeting,
  - forecasting,
  - scheduling and analytics.



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## Monitoring Productivity

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## Monitoring Productivity

- **Learning how employees work best.** Organizations can improve the organizational structure, identify what tools employees need, and find out how employees work best.
- **Serving as a training tool.** Leverage your “High Performers” to document and create training material on “best practices”.
- **Evaluating performance.** Promotes data driven employment decisions.




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## Sample Productivity Reports




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## Monitoring Productivity

Employee	Team	Walk-ins	Call Tickets	Animals	Inquiries	Inquiries Solved	New Adoptions	Voucher Issuances	Voucher Expirations	Other Change of Units	Part In	Part Out	QC Corrections	Revert - Into Year	Rent Increase Denial	RTA - Renewal	Eligibility Review	Voucher Extension	Appointments / Meetings
Amada Utra	C	2	11	94	8	2	0	0	0	0	0	0	2	0	0	0	0	0	0.00
Jacqueline Kexus	Intake/Movers	64	92	0	0	0	32	133	0	0	0	0	0	0	0	0	0	0	0.00
Alexa Valente	B	51	4	0	0	0	0	0	0	0	0	0	0	0	92	0	0	0	0.00
Terril Johnson	Eligibility	11	17	0	0	0	0	0	0	0	0	0	0	0	0	53	0	0	0.00
Betina Frederic	A	2	14	55	1	0	0	0	0	0	0	32	0	0	0	0	0	0	0.00
Kevin Mann	Eligibility	7	104	0	0	19	35	34	15	0	0	0	0	0	0	0	0	37	41, 35.35




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### Monitoring Productivity

Employee	Team	Total Productive Hours	Total Work Hours from ADP	ADP Training/Meeting	Supervisor Credits	Total Work Hours - Training/Meeting Supervisor Credits	Expected Hours of Productivity	Percentage of Productivity
Amado Urra	C	205	153.00	0.00	0.00	153.00	124.31	165.04%
Jacqueline Exceus	Intake/Moves	133	102.50	0.00	0.00	102.50	83.28	159.70%
Ana Vicente	B	87	111.25	39.75	0.00	71.50	58.09	149.18%
Terri Johnson	Eligibility	98	122.25	40.25	0.00	82.00	66.63	147.64%
Betina Frederic	A	119	112.50	0.00	0.00	112.50	91.41	130.55%
Kervin Muniz	Eligibility	143	168.25	9.00	0.00	159.25	129.39	110.79%




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### Monitoring Productivity

Employee Name	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18
B						
Ana Vicente	~	~	~	~	~	~
Elizabeth Penalver	166.71%	177.39%	157.25%	142.42%	130.80%	137.52%
Emma Mena	154.36%	165.22%	154.10%	132.10%	112.28%	144.22%
Jennifer Odom	151.61%	147.11%	152.61%	135.52%	122.31%	126.48%
Jessicka Vejega	~	~	74.77%	70.42%	52.75%	113.94%
Nataki Cooper	147.68%	156.28%	160.76%	143.27%	142.44%	251.32%
<b>Average</b>	<b>155.09%</b>	<b>161.50%</b>	<b>139.90%</b>	<b>124.74%</b>	<b>112.12%</b>	<b>154.70%</b>

Employee Name	Jul-18	Aug-18	Sep-18	Oct-18	Nov-18	Dec-18
B						
Ana Vicente	*	45.15%	90.03%	102.71%	94.51%	149.18%
Elizabeth Penalver	139.75%	130.47%	87.97%	115.91%	118.58%	108.47%
Emma Mena	139.39%	124.38%	90.59%	118.50%	97.64%	94.51%
Jennifer Odom	134.82%	134.81%	101.51%	112.77%	119.95%	97.24%
Jessicka Vejega	130.23%	119.63%	121.29%	120.62%	114.50%	75.99%
Nataki Cooper	149.36%	122.53%	100.30%	109.82%	112.69%	110.16%
<b>Average</b>	<b>138.71%</b>	<b>112.83%</b>	<b>98.62%</b>	<b>113.39%</b>	<b>109.65%</b>	<b>105.92%</b>




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### Please take a moment to give us your feedback on this session

- Open The Housing Conference app on your phone and click on the "Schedule" icon
- Choose a day, then scroll down to find the title of this session
- Or search for the session title in the search box
- Click on the title and scroll down to "Surveys"
- Click on "Please take a moment after this session to give us your feedback"
- Thank you!




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