

Philadelphia Housing Authority 2003-2004 Accomplishments Report



Philadelphia Housing Authority
Building Beyond Expectations

Carl R. Greene, Executive Director

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Building Beyond Expectations

“Building Beyond Expectations” is the motto and strategic goal of the Philadelphia Housing Authority (PHA). Those three words together define the scope and ambition of an organization committed to the fundamental transformation and expansion of the City of Philadelphia’s public and affordable housing programs. Mayor and PHA Board of Commissioners Chairman John Street set a tone and a vision for neighborhood transformation. PHA has moved that vision into action over the past six years. The agency has indeed moved “beyond expectations,” with more than \$1 billion in planned, completed and ongoing development and housing rehabilitation. The



combination of a stable and supportive political structure, an active and involved Board of Commissioners and PHA’s strong management team has created an environment that has led to unprecedented success.

In every corner of the City - from Richard Allen Homes in North Philadelphia to Tasker Homes in South Philadelphia, from Falls Ridge in the East Falls section to Martin Luther King near Center City - PHA is revitalizing Philadelphia’s neighborhoods, improving lives and serving as an economic engine for the region’s economy.

Virtually every PHA development and resident has benefited from PHA’s improvement initiatives. PHA’s affordable housing revitalization activities have also had a multiplier effect, generating new economic activity for local residents and businesses, improving confidence in the City’s real estate markets, supporting families in the transition from welfare to work, and building pride in Philadelphia’s historic and diverse neighborhoods.

Through this 2003-2004 Accomplishments Report, PHA is proud to highlight many of the agency’s recent activities and accomplishments. They reflect PHA’s “Building Beyond Expectations” mentality. Executive Director Carl Greene established the slogan as both an organizational theme and a challenge for the agency and its employees.

For many years, PHA was trapped in a cycle of deteriorating conditions, poor management and low expectations. PHA’s senior management believes the agency’s approximately 79,000 customers and the entire Philadelphia community deserve better. Neighborhood residents can now see tangible evidence of PHA’s ability to deliver quality housing that supports neighborhood transformation and encourages residents to achieve economic self-sufficiency. PHA is leading the way with a new, higher standard of excellence. Never satisfied, our emphasis in the coming months and years will be a renewed focus on improving quality in every aspect of our operations.

This renewed focus on quality improvements will generate positive impacts throughout the PHA organization. In an age of shrinking federal support for affordable housing, it is more important than ever that we work smarter. As we move forward, quality assurance and quality control initiatives will be undertaken at every level, helping us to improve the accuracy of our transactions, the strength of our employee teams, and the effectiveness and courtesy of our customer service.

PHA’s activities are coordinated to enhance and support Philadelphia’s Neighborhood Transformation Initiative. Executive Director Greene works closely with Mayor Street to coordinate the attack against neighborhood blight. PHA believes that working together we can strengthen and rebuild the fabric of our great City.



■ Mayor John Street and Executive Director Carl Greene at PHA Board Meeting

PHA Strategic Goals

Implementing our MTW Demonstration Program Commitment



On April 1, 2001, the Philadelphia Housing Authority (PHA) became one of thirty-two participants nationwide in the Moving To Work Demonstration Program. Congress established the Moving To Work (MTW) Demonstration Program in the Omnibus Consolidated Rescissions and Appropriations Act of 1996. Through designation as an MTW agency, participating Housing Authorities are given substantial budget flexibility and regulatory relief in order to facilitate the accomplishment of national and locally determined MTW goals.

PHA's MTW initiative supports the Strategic Operating Plan goals and objectives. While focusing on the most recent years' activities, the Accomplishments Report makes reference to PHA's major activities and accomplishments during the first three years of the MTW Demonstration Program, the period from April 1, 2001 through March 31, 2004.

The Philadelphia Housing Authority is a complex and multi-faceted operation. Each day, 1,985 employees are engaged in hundreds of projects and activities at 43 conventional public housing developments, 15 scattered site developments and 5 alternatively managed developments, and at administrative offices, maintenance shops and supportive service centers throughout the city. In addition to owning and managing public and affordable housing sites and overseeing more than \$1 billion in construction activity, PHA operates a Housing Choice Voucher Program that serves more than 16,000 households, and provides youth, economic self-sufficiency, and senior programs that assist thousands of city residents.

PHA's Strategic Operating Plan provides a structure for addressing and tracking these interrelated programs of redevelopment, property management, maintenance, supportive services and other activities. To facilitate monitoring and accomplishment of the Strategic Operating Plan, PHA has established a new Office of Strategic Management (OSM). OSM staff provides project management oversight and support to PHA's departments, ensuring that all Strategic Operating Plan goals and tasks are addressed and properly resourced.

- MTW Priority 1:** Reform the existing Housing Choice Voucher program and public housing programs.
 - Goal 1: Achieve excellence in property management.
 - Goal 2: Achieve excellence in the management of the Housing Choice Voucher program and enforce program compliance.
- MTW Priority 2:** Revitalize neighborhoods where MTW and MTW-eligible residents reside.
 - Goal 3: Develop affordable quality housing that supports balanced communities.
- MTW Priority 3:** Develop an MTW family program to furnish comprehensive economic self-sufficiency services to eligible MTW families.
 - Goal 5: Engage other institutions to leverage resources and assist in promoting economic enhancement and supportive services for PHA residents.
 - Goal 9: Expand inter-governmental initiatives to enhance the ability of PHA to deliver sound and effective public service.
- MTW Priority 4:** Establish a quality of life program to promote a living environment that fosters community values, encourages resident participation and positive peer group pressure, and reinforces the responsibilities of public housing residents, voucher and landlord participants and PHA, to one another and the broader community.
 - Goal 4: Implement public safety programs that promote the well-being of our neighborhoods and the accountability of program participants.
- MTW Priority 5:** Establish efficient operating procedures and implement cost-saving strategies.
 - Goal 6: Improve the productivity and cost effectiveness of PHA operations.
 - Goal 7: Improve program compliance, reporting, performance and accountability.
 - Goal 8: Maximize the use of technology to improve the efficiency and accountability of PHA operations.

The evidence of our accomplishments in this report translates to one overriding conclusion: PHA remains a national leader in the provision of public and affordable housing and we intend to build on our success for the benefit of Philadelphia's neighborhoods.

The Accomplishments Report for 2003-2004 highlights and summarizes the accomplishments achieved by PHA under each of the nine Strategic Operating Plan goals during the fiscal year from April 1, 2003 through March 31, 2004.

Major Accomplishments

The past twelve months have been an extraordinarily productive period at the Philadelphia Housing Authority. The following sections of this report provide extensive detail on PHA activities and accomplishments with an emphasis on the fiscal year ending March 31, 2004. Some of the most significant accomplishments include:

- Priming the economic engine of the Philadelphia region, PHA aggressively implemented its \$1 billion building



Tasker Homes Construction– South Philadelphia

program, providing hundreds of jobs and business opportunities for public housing and neighborhood residents and local businesses.

- Private investors and independent financial analysts endorsed PHA's

management and financial capacity, resulting in a total of \$106 million in private equity raised to date to support PHA housing redevelopment. This includes \$22 million raised this past year from private investors to support Cambridge Plaza III and Lucien E. Blackwell off site phases.

- PHA continued its leadership in the awarding of contracts to Minority and Women-owned Enterprises in the past year, awarding nearly \$37 million in contracts - 32% of all PHA contracts – to MBE/WBE firms. PHA was also able for the first time to capture construction management contracts in this calculation.
- PHA's ambitious efforts to revitalize public housing bore fruit in the form of hundreds of households moving into new apartments at Cambridge Plaza, Richard Allen Homes, Martin Luther King Plaza, Falls Ridge and other PHA sites. This year, PHA completed and leased 178 units at Richard Allen Phase 3; completed and leased 44 units at Cambridge Plaza Phase 1; completed 135 units at Falls Ridge as part of Phase 1; and completed and leased 45 units at Martin Luther King Phase 1. When completed, the combined impact of HOPE VI funded activities at Richard Allen, Falls Ridge, Martin Luther King and Mill Creek will house 3,990 people in 1,582 new or substantially rehabilitated units.
- PHA's Annual Audit for Fiscal Year 2003 resulted in no new audit findings. Further, PHA sustained its A+ credit rating from Standard and Poors.
- The transformation of the entire Tasker Homes community proceeded at a rapid pace including resident relocation and demolition of 337 units. Construction started on 245 rental units, with 48 units completed by year's end.
- At Wilson Park, PHA completed modernization of 153 townhouse units, installed three new streets, and planned a major expansion of the existing community center to accommodate enhanced senior and youth activities.
- Comprehensive modernization of 58 townhouse units was completed at Blumberg, along with upgrades to the security system.
- As part of the Mill Creek Master Plan, PHA commenced construction of 80 rental and 40 homeownership units at Lucien E. Blackwell Homes, renamed for an esteemed and committed community activist, who served as a city councilmember and Congressman.
- In support of citywide neighborhood revitalization, PHA completed redevelopment and reoccupancy of 137 units at historic Suffolk Manor, and completed and reoccupied the first 85 of 161 units at Mt. Olivet. The Suffolk Manor project received an award from the Preservation Alliance.
- As part of PHA efforts to upgrade every public housing site, modernization activities took place at Whitehall, West Park, Liddonfield, Harrison, Spring Garden and other PHA sites.
- To address the critical need for affordable housing in Philadelphia, PHA increased the number of families supported through the Housing Choice Voucher (HCV) Program by 1,261 to bring our total households served to 16,539.
- Emphasizing its commitment to efficiency and quality customer services, PHA commenced implementation of a new HCV

Quality Initiative that will provide training, technology and other resources to HCV staff. New staff was hired to provide quality control review and support for the program. Quality control staff is currently working at all HCV Community-Based Management Offices.

- PHA continued to maximize the flexibility granted the agency under the Moving To Work (MTW) Demonstration program to make major changes in the HCV Program. Among the most significant changes, PHA implemented a new program designed to support residents in achieving economic self-sufficiency through development of individual Family Economic Development Action Plans. As part of this initiative, PHA established a seven-year time limit on Housing Choice Voucher program participation (except for seniors and persons with disabilities who are unable to work). Between August 2003 and March 31, 2004, 2,657 residents signed Action Plans.
- As part of continuing efforts to use HCV vouchers to support neighborhood revitalization and economic mobility, PHA partnered with a range of organizations to commit over 700 vouchers under its new Unit-Based Subsidy RFP program.
- To streamline program administration and achieve efficiencies, PHA obtained Board approval for a new simplified rent system, including revised ceiling rents and new minimum rents. These changes apply to the Public Housing and Housing Choice Voucher programs.
- PHA's effective and sound administration of federal funds was demonstrated by a recently completed federal audit of PHA's construction contract administration. After an extensive review, the HUD Office of Inspector General found that PHA construction contracts are being administered in accordance with federal procurement requirements and guidelines. No findings of misappropriation or non-compliance were made.
- PHA accelerated the pace of its Housing Choice Voucher Homeownership program, with 39 sales this past year and plans to sell another 100 homes this year.

- PHA issued a new RFP for the Local Unit-Based Program. The RFP uses MTW flexibility and allows qualified partners to request Housing Choice Vouchers, ACC, or other available PHA funds for the repair, rehabilitation, or construction of new units for neighborhood revitalization efforts. To date PHA has awarded 743 vouchers to qualified partners to support this initiative.
- PHA's operations showed improvement at virtually every level of the agency, allowing PHA to provide higher quality services to more low-income households. PHA expanded its commitment to staff training including implementing Low-Income Housing Tax Credit (LIHTC) compliance training for management staff, expanding training on the PeopleSoft Customer Response Management (CRM) and other applications, and ongoing management training in coordination with the Institute of Real Estate Management. Last year's LIHTC training was clearly effective in that PHA was able to achieve all of its LIHTC benchmarks.
- Technology improvements were implemented including new CRM knowledge database modules; integration of legacy HCV systems with PeopleSoft AP in order to make payments and track financials; extensive work on design and testing of new MTW client tracking and compliance system; and, a number of network server, infrastructure and desktop upgrades.
- PHA's government and agency partners exhibited extensive, direct support for PHA's Strategic Operating Plan objectives. These partnerships are in evidence in every aspect of PHA operations from redevelopment activity, to public safety, to supportive services. MTW Designation, receipt of Low-Income Housing Tax Credit commitments and approval of the Tasker Homes innovative bond financing approach in recent years all indicate a high level of confidence in PHA by its agency partners.



LIHTC Training Seminar

- PHA continued to operate and enhance its Family Self-Sufficiency (FSS) Center North at the Blumberg Apartments. The FSS Center includes ten PHA partners along with a computer center, offices, testing and training facilities. Residents from any PHA site or program can use the center for career counseling, computer training, GED preparation, childcare referrals and other needed services. An extensive new program of computer training for residents began this January, with 29 residents participating in the first four-month cycle and 110 more signing up for the second cycle, which began on April 1.



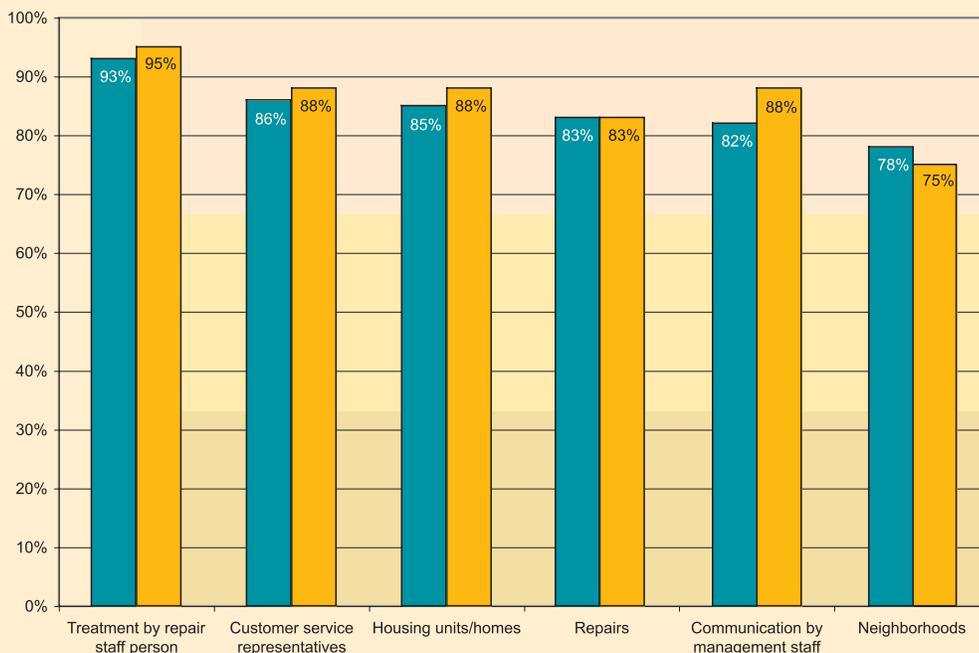
Blumberg Self-Sufficiency Center

- Residents actively participated in various social service, literacy and economic self-sufficiency programs operated at Blumberg.

Since opening the first Self-Sufficiency Center at Blumberg, PHA MTW Family Service staff and partners have served 2,589 residents. In the first 24 months of MTW, 156 households have increased their incomes so that they no longer need HCV subsidies.

- PHA continued to operate the Pre-Apprenticeship Training Program initiative in partnership with building trade unions. 62 residents graduated in the past year. During the ten (10) cycles PHA has sponsored and placed over 172 graduates into the Building trades: 86 carpenters, 16 painters, 15 electricians, 5 drywall finishers, 6 cement finishers, 5 plasterers, 2 plumbers, 3 sheet metal workers, 2 glazers and 32 union laborers.
- Last year, the PHA sponsored Certified Nursing Assistant Program graduated 90 residents from Professional Healthcare Institute (PHI). To date, 736 residents have graduated, of which over 95% obtained employment.

Customer Satisfaction Survey



For the past two years, PHA has utilized an independent company to conduct a citywide survey to evaluate resident satisfaction. The survey shows an already high score on housing satisfaction of 85% last year growing even higher this year to 88%. The data also show that an area that remains a challenge is neighborhood transformation – a long-term endeavor.

Goal 1: Achieve Excellence in Property Management

PHA's core business focuses on providing high quality management and maintenance services to approximately 30,456 residents. PHA owns and manages a total of 12,696 occupied units in 43 conventional public housing, developments 15 scattered site developments and 5 alternatively managed developments. Achieving continuous improvements and excellence in the provision of property management services remained a primary focus of PHA operations during this past year. PHA's professional management continued to be endorsed by Standard & Poor's rating service, which gave PHA a "strong" rating, the highest rating awarded to any Public Housing Authority in the country.



- Over the past twelve months, PHA's ambitious efforts to revitalize public housing bore fruit in the form of hundreds of families moving into new apartments. This year, PHA completed and leased 178 units at Richard Allen Phase III; completed and leased 44 units at Cambridge Plaza Phase 1; completed 135 units at Falls Ridge as part of Phase 1; and completed and leased 45 units at Martin Luther King Phase 1. When completed, the combined impact of HOPE VI funded activities at Richard Allen, Falls Ridge, Martin Luther King and Mill Creek will house 3,990 people in 1,582 new or substantially rehabilitated units.
- PHA's neighborhood revitalization initiatives also resulted in new households moving into rehabilitated units at Mt. Olivet and historic Suffolk Manor. In tandem, PHA undertook an extensive relocation effort at Tasker to pave the way for a complete rebuilding of this distressed community. By the end of the fiscal year, 48 housing units at Tasker were finished and available for re-leasing. PHA's activities under this Strategic Operating Plan goal include re-occupancy related initiatives including screening, resident orientation, move-ins and related tasks.
- Through vacancy reduction and revitalization efforts, PHA rehabilitated 296 previously vacant scattered site public housing units and 833 Conventional units. Through its model Home Selection Day initiative, approximately 1,100 families and individuals were able to select and move in to new affordable apartments. To help ensure successful tenancies, many of these families receive case management, employment training, and other support services from PHA's partner agencies.
- PHA continued to implement the Sparkle Plus program, which was established in 2000 to focus intensive resources on improving "curb appeal" of its properties. Through Sparkle Plus, staff and volunteer resources have been deployed to PHA developments throughout the City to help put a new "sparkle" on public housing communities. To date, \$3.78 million in Sparkle Plus resources have been utilized to upgrade lighting, maintain existing landscaping, install new bollards and decorative fencing, install new exterior doors and mailboxes, and complete a wide range of other upgrades designed to create more attractive, livable communities.
- PHA has met all of its benchmarks under the Low-Income Housing Tax Credit (LIHTC) program. PHA conducted extensive staff training with the assistance of an independent LIHTC compliance specialist. The firm provides training, monitoring and supervision related to all aspects of Tax Credit compliance and reporting.
- In the area of maintenance work order response, PHA continued to improve its performance relative to prior fiscal years by achieving further reductions in long-standing scattered site work order backlogs. PHA corrected or abated 100% of emergency work orders



within 24 hours of receipt. Emergency work orders totalled 1,765.

- PHA completed more than 71,000 routine work orders.
- PHA completed inspections on 100% of all conventional, scattered site and alternatively managed entity units in the past year.
- PHA continued to implement a comprehensive program of building inspections, infrastructure upgrades and routine building maintenance.
- PHA obtained Board approval and began implementation of a new, simplified rent collection and rent certification system.

The first phases of the new system involving new ceiling rents and minimum rents will be fully implemented in the summer of 2004.

- PHA continued its commitment to building the highest quality management staff through continued technical training and implementation of new streamlined procedures including quality control reviews. Extensive staff training efforts included training in Low-Income Housing Tax Credit Compliance, use of PeopleSoft applications, and Niku Project Management training.

Accomplishments Summary

Accomplishment 1: Leased up 178 new units at Richard Allen Homes

Accomplishment 2: Leased up 44 new units at Cambridge Plaza

Accomplishment 3: Completed rehabilitation of 296 previously vacant scattered site units and 833 Conventional site units

Accomplishment 4: Leased up 45 new units at Martin Luther King Plaza

Accomplishment 5: Leased up 135 new units at Falls Ridge

Accomplishment 6: Leased up 137 units at Suffolk Manor

Accomplishment 7: Leased up 85 new units at Mt. Olivet

Accomplishment 8: Completed relocation and began leasing of first 48 new units at Tasker Homes

Accomplishment 9: Completed 100% of all emergency maintenance work orders within 24 hours of receipt

Accomplishment 10: Achieved all Low-Income Housing Tax Credit benchmarks

Other Results

- Awarded Supervisory Asset Management Training contract to provide PHA Asset Managers a sound foundation in core competencies relating to Public Housing Eligibility, Housing Quality Standards, Project-Based Vouchering and Family Self Sufficiency, etc.
- Awarded multiple landscaping contracts to ensure a clean, crisp appearance of PHA facilities. Each contract awardee has partnered with a Section 3 firm.
- Undertook lead abatement activities at 431 housing units and asbestos remediation efforts. Awarded multiple contracts for the sampling, testing, removal and remediation of lead paint, asbestos and other hazardous materials.

Goal 2: Achieve Excellence in the Management of the Housing Choice Voucher Program and Enforce Program Compliance



PHA's Housing Choice Voucher (HCV) program provides affordable housing throughout the City of Philadelphia to 16,672 households. Improving coordination and responsiveness to community concerns about the HCV program is a key objective under PHA's Strategic Operating Plan. Towards this end, PHA currently has five community site-based offices, which provide neighborhood residents with convenient access to conduct business and contact with their assigned Service Representatives. During this fiscal year additional staff – including quality control staff - was added to each satellite office to accommodate the MTW economic self-sufficiency growth of our residents. In the last fiscal year, PHA served 1,261 new households through the HCV program.

- PHA continued to implement a number of fundamental changes to the HCV program in response to community concerns and needs. These initiatives were made possible by the regulatory flexibility allowed PHA under its Moving To Work Demonstration Program. For example, PHA has established a seven-year time limit for HCV program that applies to all households except for seniors, persons with disabilities who are unable to work, and households where the head of household is the sole caregiver for a disabled dependent. PHA has also implemented a two-year recertification program to reduce administrative burdens and promote economic self-sufficiency.
- HCV participants who are subject to the seven-year time limit now work with PHA to develop a Family Economic Development Action Plan. This Plan helps establish self-sufficiency goals for the entire family in order to assist them in improving their overall economic status. PHA staff is collaborating with a wide range of local partners to provide employment training, and other supportive services to HCV program participants. During the past year, PHA contracted with several new training partners.
- The PHA Board approved a new rent simplification system that will impact all HCV participants in the coming months. Part of this initiative involves establishment of a \$50 minimum rent payment for all program participants.
- PHA accelerated the pace of its Housing Choice Voucher homeownership program. PHA closed 39 HCV homeownership sales in the past year, with the goal of completing at least 100 more by March 31, 2005. All of the homeownership families are participants in PHA's MTW economic self-sufficiency programs. Participating families receive assistance in developing self-sufficiency plans, obtaining needed employment, training and other support services, and working towards family-determined goals.
- During Year 3, PHA issued a new RFP for the Local Unit Based Voucher Program. The RFP uses MTW flexibility and allows qualified partners to request Housing Choice Vouchers, ACC, or other available PHA funds for the repair, rehabilitation, or construction of new units for neighborhood revitalization efforts. To date PHA has awarded 743 vouchers to qualified partners to support this initiative. As part of the award process, PHA requires that any projects targeted for vouchers meet the MTW site and neighborhood standards and other MTW requirements. PHA believes that the new Unit-Based program will serve as a catalyst for small and mid-scale neighborhood revitalization efforts.
- PHA has introduced a new Quality Initiative for the HCV program. To date, eight full-time staff have been trained and assigned to conduct quality control activities including file review and one-on-one staff follow up and training. The new Quality Initiative will unfold over the



coming months, focusing training, technology and other resources to improve the quality of program transactions and customer service. PHA's customer service improvement efforts in the past year also included establishment of a new help desk system to route and track inquiries and complaints.

- HCV landlords continued to participate in a mandatory orientation program offered by the Institute of Real Estate Management. This initiative is designed to help landlords fully understand their roles and responsibilities. In the process, PHA believes that the result will be better service to HCV participants and more responsiveness to neighborhood resident concerns. To date, more than 450 landlords have taken the full-day course.
- Efforts to improve the quality and expand the geographic distribution of housing units available to HCV participants expanded during the past year. These efforts included conducting Housing Fairs and contracting

with a non-profit firm to provide mobility counseling to program participants including people with disabilities and relocated public housing residents.

- Extensive staff training efforts were implemented during the past year including file review, rent calculation and related subjects.
- To improve program operations and responsiveness to community concerns, PHA continued to support the Tenant/Landlord Advisory Board, which provides input to the agency on HCV policies and procedures. PHA also hired a second Community Liaison (Ombudsman) to assist in resolving community complaints and provide ongoing informational services.
- PHA continued to provide timely payments to owners through Direct Deposit. HCV financial payment processing was moved to the PeopleSoft system during this past fiscal year.
- Staff also inspected 100% of all units for HQS compliance.

Accomplishments Summary

Accomplishment 1: Provided rent subsidies to 16,672 households, an increase of 1,261 over the prior year

Accomplishment 2: Partnered with qualified local groups to issue 743 unit-based vouchers

Accomplishment 3: Accelerated pace of HCV Homeownership program, completing 39 additional sales with plan for 100 more by March 31, 2004

Accomplishment 4: Inspected 100% of all units for Housing Quality Standard compliance

Accomplishment 5: Implemented new quality control procedures including hiring of QC staff and kick-off of HCV Quality Initiative

Accomplishment 6: Conducted landlord training and orientation programs to improve service and program compliance

Accomplishment 7: Conducted housing fairs attended by over 800 voucher holders and 250 property owners, resulting in approximately 200 housing placements

Accomplishment 8: Continued to support the Tenant/Landlord Advisory Board as a forum for ongoing community input to PHA HCV program policies and procedures and hired second community liaison

Accomplishment 9: Implemented new Help Desk system to route and track inquiries and complaints

Other Results

- Prepared updated revisions to Administrative Plan and Desk Manuals.
- Provided ongoing program integrity, fraud detection and compliance investigation services through the Program Compliance Investigator staff, which resulted in over 1,200 terminations.
- Continued operations of Supportive Housing programs that combine rent subsidies with the provision of social services for special needs populations.
- Provided intensive case management to formerly homeless families moving into HCV units through a contract with Philadelphia Health Management Corporation.
- Established EPA Health-based standards tracking and monitoring system for children with elevated lead levels.

Goal 3: Develop Affordable Quality Housing that Supports Balanced Communities



Falls Ridge

Over the past six years, PHA worked diligently to reverse decades of neglect and underfunding that manifested itself in the highly distressed conditions of many PHA developments. Therefore, one of PHA's primary areas of focus has been to obtain the resources needed to fully revitalize existing public housing communities and to move construction activities forward at a rapid pace. In addition, new development activities are also a priority for PHA as they can offset the loss of units resulting from density reduction at HOPE VI sites and contribute greatly to the City's neighborhood revitalization efforts. The results of these efforts have been tangible and dramatic. Highlights of the past year include:

- PHA continued its effective and sound administration of more than \$1 billion in construction activities. PHA staff members are proud to report that a recently completed federal review of PHA construction administration resulted in no findings of non-compliance or misappropriation in the area of construction contract administration.
- PHA has expanded its role as developer by adding two new transactions (Cambridge Plaza III and Lucien E. Blackwell, off site) to the eight deals it currently has in its portfolio, creating another 120 rental units and successfully securing an additional \$22 million in private equity from investors for a total of \$106 million raised to date.
- PHA added two new equity investors, Wachovia and PNC, to its current list of investors, which includes John Hancock, MMA/Lend Lease and Related. The increased competition resulted in higher equity pay-in.
- PHA completed and leased 178 units at Richard Allen Phase 3; completed 135 units at Falls Ridge as part of Phase 1; and, completed and leased 49 units at Martin Luther King Phase I. When completed, the combined impact of HOPE VI funded activities at Richard Allen, Falls Ridge, Martin Luther King and Mill Creek will house 3,990 people in 1,582 new or substantially rehabilitated units.
- The transformation of the entire Tasker Homes community proceeded including resident relocation and demolition of 337 units. Construction started on 245 rental units, with 48 units completed by year's end. PHA is the developer at Tasker Homes, a project involving demolition of 1,000 units and development of 554 new homeownership and rental units. Tasker involves over \$168 million in LIHTC, General Obligation Bonds, Private Activity Bonds, PHFA Homebuyer Loans and other funds.
- PHA completed modernization of 153 townhouse units at Wilson Park, installed three new streets, and planned a major expansion of the existing community center to accommodate enhanced senior and youth activities.
- Comprehensive modernization of 58 townhouse units was completed at Blumberg, along with upgrades to the security system.
- Construction of 117 scattered site units was completed, of which 69 units are equipped for the mobility impaired.
- In total (including the above 69 scattered site units), PHA completed modifications to 149 units for mobility-impaired residents, as part of an overall agreement to create 248 accessible units.
- Modernization and other capital improvement initiatives were undertaken at Whitehall, West Park, Liddonfield, Harrison, Spring Garden, Hill Creek and other sites.
- As part of the Mill Creek Master Plan, PHA commenced construction of 80 on-site rental and 40 homeownership units at Lucien E. Blackwell Homes.
- PHA provided \$362,000 in permanent financing and rental subsidy for 67 rental units in a \$ 10 million, newly constructed elderly assisted living development completed by the St Ignatius Nursing Home in the Mill Creek community. St. Ignatius raised \$6.4 million in private equity for this project.

- PHA completed redevelopment and reoccupancy of 137 units at Historic Suffolk Manor, and completed and reoccupied the first 85 of 161 units at Mt. Olivet. The Suffolk Manor project received an award from the Preservation Alliance.
- PHA awarded \$2 million in construction and permanent financing and rental subsidy for a \$9.7 million, 67-unit elderly project with supportive services in the Port Richmond community. The Developer has raised \$5.4 million in private equity.

Accomplishments Summary

Accomplishment 1: Continued effective management and oversight of more than \$1 billion in ongoing redevelopment activity

Accomplishment 2: Secured \$22 in new private equity funding, bringing the total in the current redevelopment effort to \$106 million

Accomplishment 3: Completed Cambridge Plaza I consisting of 44 rental units, and began construction on 40 Phase II units

Accomplishment 4: Completed construction of 178 Richard Allen Phase 3 units, and started construction on new community center

Accomplishment 5: Completed construction of 135 Falls Ridge (formerly Schuylkill Falls) Phase 1 units

Accomplishment 6: Completed construction of 48 (of 245) Phase 1 Tasker Homes rental units

Accomplishment 7: Began construction of 80 on-site rentals and 40 on-site homeownership units at Lucien E. Blackwell Homes (formerly Mill Creek)

Accomplishment 8: Completed final phase at Wilson Park consisting of complete rehabilitation of 153 townhouse units

Accomplishment 9: Completed rehabilitation and reoccupancy of 137 units at Suffolk Manor

Accomplishment 10: Completed rehabilitation and reoccupancy of initial 85 (of 161) units at Mt. Olivet

Other Results

- Developed financial plan and submitted a LIHTC application for substantial rehabilitation of Germantown House
- Conducted master planning in various sites including: Passyunk Homes; the neighborhood adjacent to Richard Allen Homes and Cambridge Plaza; the Mantua neighborhood; the Queen Lane/Morton Homes neighborhood; the Diamond Street area; the Croydon apartment complex and adjacent parcels; and, others.

Goal 4: Implement Public Safety Programs that Promote the Well Being of Our Neighborhoods and the Accountability of Program Participants



PHAPD Officer with family

PHA is committed to a comprehensive approach of improving community security at PHA developments and supporting the Housing Choice Voucher Program initiatives. PHA developments have become safer communities as a result of an extensive site-based, community-policing program undertaken by the PHA Police Department. PHAPD utilizes a comprehensive approach to crime reduction that emphasizes crime prevention, conflict resolution, resident involvement and community partnerships.

PHAPD has established a patrol strategy putting emphasis on community based policing and continued partnerships with PHA Housing Operations, the Housing Choice Voucher Program and the Philadelphia Police

Department (PPD). Philadelphia Housing Authority Command Staff is in attendance at all Conventional and Scattered Site meetings on a monthly basis to facilitate communication and collaboration with the Asset Managers responsible for each site.

PHAPD attends the Philadelphia Police Department's COMPSTAT meeting on a weekly basis. It also maintains a direct link to information via CityNet (which is the City of Philadelphia Wide Area Network) regarding crime statistics, calls for services and arrests of public housing residents. Yearly mandatory re-certification training is provided to the PHAPD from the City of Philadelphia Advanced Training Unit. PHAPD has also procured 800mhz radios that allow PHAPD Officers to have emergency communications with the Philadelphia Police Department and to monitor their system for incidents within PHA Developments.

The PHAPD has implemented an internal "Quality of Life Status Meeting" format. These meetings include all stakeholders of the community; including the resident leadership, site management and support staff at each development and provide a forum to discuss quality of life issues.

The Chief of Police has implemented a program of systematic checks of all high-rise facilities. This program allows officers to systematically check buildings and report their findings, if any, to the manager. Officers are instructed to observe and record any situation that can impact the quality of life in a development and to develop partnerships with the site managers. Additionally, The Command Staff of the PHAPD are assigned a high-rise development and are required to conduct a weekly inspection.

PHAPD and PPD are in the process of establishing a data link between the two departments. This link will provide the PHAPD the most accurate crime and incident information in its history. This data will enhance enforcement both in HCVP and conventional sites. This is a significant step in improving the quality of life for all of our clients.

PHA joined the Citizens Crime Commission anonymous tip line reward program. The PHA Police have also entered into a contract with the City of Philadelphia Managing Director's Office of Town Watch to implement Town Watch programs in several PHA developments.

PHAPD, in partnership with Tenant Support Services Incorporated, has established a Police Advisory Board. The mission statement of this board has been established within the following measurable goals:

- Provide professional responses and strategic initiatives to the challenges and concerns of all Philadelphia Housing Authority residents.
- Recommend to the PHA Police Department appropriate policies, programs and initiatives.
- Coordinate programs and projects, which contribute to the betterment of our community.
- Promote and facilitate partnerships between PHA Police Services and the PHA Community.
- Provide advice and assistance to the PHA Community in administering public safety issues and endeavors in particular methods and ideas in crime prevention.
- Provide a forum for the exchange of ideas pertaining to crime prevention.

The PHA Police Department Detective Division continued to provide support to the Housing Choice Voucher Program (HCVP) and Compliance Unit. PHA has assigned police officers to the Lease Enforcement and Compliance Unit (LECU). Furthermore, the Internal Affairs Bureau continues to investigate complaints received against agency employees:

- PHAPD Investigation Unit conducted 340 investigations both internal and confidential.
- The Lease Enforcement and Compliance Unit received 174 complaints resulting in 45 evictions with another 52 pending.
- During the fiscal year, the PHAPD conducted 16,773 criminal history checks for both HCVP and Conventional Sites. As a result of these check 141 individuals were denied admittance because of their criminal history.
- The Housing Choice Voucher Investigations unit investigated 881 cases during FY-2003 which resulted in 262 terminations

During the past year, PHAPD worked extensively with neighborhood youth through the DARE, GREAT and Explorers programs. The DARE/GREAT Program focused on the following schools PHA children attend. The participating schools are; Creighton Elementary, Austin Meehan Middle School, GAMP Junior/ Senior High School, St. Ignatius Elementary, Smedley Elementary, Alcorn Elementary, Daroff Elementary, Dunbar Elementary, Harding Jr. High School, Harrison Elementary, Holmes Elementary, Locke Elementary, Overbrook Elementary, Reynolds Elementary, Susltzberger Middle School and Martha Washington Elementary

Additionally, the DARE/GREAT and Explorers program served children residing at PHA developments during the summer months of year 2003 at the following locations: Temple Health Community Connection, Salvation Army Community Center, West Park Day Care, Smith Memorial Day Care, Wilson Park Apartments, Johnson Homes, Liddonfield Homes, Whitehall Apartments, Happy Hollow Summer Camp, Stinger Square Neighborhood Association, Liddonfield Day Camp. Help Family Center, HOPE VI Family Centers and Beacon Education sites.

Additionally, the PHA Police Department has outfitted two Mobile computer labs with wireless Internet access. These mobile labs travel to different Housing developments to train and familiarize residents with the latest computer technology.

The PHA Police Explorer program has received funding through the Juvenile Accountability Incentive Block Grant (JAIBG). This program is managed by the Philadelphia Department of Human Resources and District Attorney's Office. The program is funded through the Pennsylvania Commission of Crime and Delinquency (PCCD).

In addition to the activities of the PHAPD, PHA also uses capital resources to improve security and public safety. In 2002 the security system at West Park Apartment was activated with a state of the art video and card access systems using digital imaging technology. The security program at West Park has helped the development set security standards that will be adopted by the Authority in all of its modernization projects. In 2003 Norman Blumberg Apartments also went online with state of the art digital video, card access and electronic door systems.



West Park Apartments security

Accomplishments Summary

Accomplishment 1: Implemented Quality of Life meetings to involve all stakeholders in developing crime response and prevention strategies at PHA sites

Accomplishment 2: Continued partnerships with Philadelphia Police Department, Narcotics Task Force, DEA and HUD-OIG to ensure coordination of resources and effort

Accomplishment 3: Established and supported Police Advisory Board in partnership with Tenant Support Services, Inc.

Accomplishment 4: Conducted 164 community outreach unit site visits

Accomplishment 5: Removed 238 abandoned cars from PHA properties

Accomplishment 6: Implemented DARE/GREAT and Explorers youth program activities at elementary schools attended by PHA youth

Accomplishment 7: Provided response to over 62,000 non-emergency calls, 170 emergency calls and 80 medical calls referred to PHAPD by the Philadelphia Fire rescue Squad

Goal 5: Engage Other Institutions to Leverage Resources and Assist in Promoting Economic Enhancement and Supportive Services for PHA Residents



PHA made substantial progress this past year toward fully implementing MTW family support services, including development of new training partnerships, hiring of Economic Self-Sufficiency Coordinators, and continuation and expansion of efforts to enhance resident economic self-sufficiency. Through a wide range of creative partnerships, PHA sponsors and/or directly operates numerous economic self-sufficiency and social service programs. The goals of these program focus on assisting residents to maximize their individual potential, build self-sufficiency skills and become involved in positive, uplifting activities. Residents of all groups are serviced through these initiatives including early childhood development, youth after school, adult employment and training, and senior service programs.

Central to PHA's approach is leveraging resources, collaborating with resident leadership, and partnering with qualified agencies and institutions to bring the best available program services to PHA residents. Over the past six years, PHA has secured over \$55 million in funding to enhance resident-oriented programs. Key partnerships were implemented or continued with local banks, Temple University, Penn State, the Philadelphia Health Institute, Department of Human Services, PCOA, PWDC, and others.

PHA also works aggressively to provide employment opportunities for residents. PHA's Human Resources Department has successfully worked to recruit, train and place residents in jobs in Housing Operations, Head Start, Senior Services, the Summer Food Program and other areas. Job postings are forwarded to resident leaders and on the PHA website. In addition, as noted below, the Pre-Apprenticeship and Certified Nurse Assistant programs have been very successful in placing residents in career-oriented jobs.

The MTW Customer Support Services staff sponsored several successful Job Fairs to provide employment opportunities and referrals to residents. PHA's Human Resources Department as well as a wide range of public and private employers participated in these events.

Housing Choice Voucher participants who are subject to the new seven-year time limit (excluding seniors, people with disabilities and others who are unable to work) must now work with PHA to develop a Family Economic Development Action Plan. This Plan helps establish self-sufficiency goals for the entire family in order to assist them in improving their overall economic status. PHA staff is collaborating with a wide range of local partners to provide employment training, and other supportive services to HCV program participants. During the past year, PHA contracted with several new training partners as discussed in goal 5.

To date, 2,657 Action Plans were signed from August 2003 to March 31, 2004. The Action Plan helps establish self-sufficiency goals for the entire family. In addition to the Action Plan, families are required to sign an MTW agreement, which describes participant responsibilities. To date, 8,549 households have signed MTW agreements since April 2003.

PHA continued to operate and enhance its Family Self-Sufficiency North Center at Blumberg Apartments. The FSS Center houses ten PHA partners and includes a computer lab, training rooms, and private offices. Residents from any PHA site or program can use the center for career counseling, computer training, GED preparation, childcare referrals and other needed services. An extensive new program of computer training for residents began this year.

Residents actively participated in various social service, literacy and economic self-sufficiency programs operated at Blumberg. Since opening the first Self-Sufficiency Center at Blumberg, PHA MTW Family Service staff and partners have served 2,589 residents. In the past 24 months of MTW, 156 households have increased their incomes so that they no longer need HCV subsidies.

New computer classes were officially kicked off in January 2004 at the Family Self Sufficiency Computer Lab. Computer Training Classes are divided into two levels, Beginning and Advanced. The beginning class is a 10-week class and the advanced class is a 12-week class. During the



Certified Nurse Assistant Program graduates

period of January 5th and March 31st, the Computer Training Classes served a total of Twenty-nine (29) people. Among them, twenty (20) people were in the Beginning Computer Class, and nine (9) people were in the Advanced Computer Class. In this coming year we expect to double our number. There are 110 residents that have signed up for the second set of classes, which began in April 2004.

Homeownership development activities continued at a rapid pace. In addition to 39 homes sold in the Housing Choice Voucher program, nine (9) were sold under the Turnkey III Program and eight (8) others were sold in the Section (5H) Scattered Sites Program. PHA plans to sell an additional 100 homes in the HCV program this year.

Many other PHA residents received homeownership counseling in preparation for their entry into homeownership. The Homeownership Division provided homebuyer's club workshops to over 500 clients last year. PHA also established partnerships with major banks including Fleet Mortgage, Citizens Bank, Wells Fargo and Wachovia Bank, and various mortgage companies who have committed in writing to provide in-kind services totaling \$657,000. The services include free credit reports, budgeting/money management, counseling, and credit repair.



Pre-Apprenticeship Program Class

PHA continued to operate the Pre-Apprenticeship Training Program initiative in partnership with building trade unions. 62 residents graduated in the past year. Some graduates are employed in career opportunities with the Philadelphia Housing Authority. The program has four curriculums, General Education Diploma, Adult Basic Education, Life Skills and Shop. The instructors from Community College of Philadelphia coordinate the General Education Diploma program. The programs offer two advanced and one intermediate class. During the ten (10) cycles since the program's origin, PHA has sponsored and placed over 172 graduates

into the Building trades.

Last year the PHA sponsored Certified Nursing Assistant Program graduated 90 residents from Professional Healthcare Institute (PHI). To date, 736 residents have graduated, of which over 95% obtained employment.

PHA implemented, through two sub-contractors, the PA State Department of Public Welfare's funded Job Retention, Advancement and Rapid Re-employment (JRARRE) program. PHA's program mission was approved by the State and is dedicated to providing public and assisted housing residents with maximum opportunities to become economically and personally self-sufficient. Because it is recognized that moving from assistance to employment can be difficult and that sometimes the barriers to success can be discouraging, PHA provides services, counseling, and incentives to assist residents to achieve their employment and personal goals. To date, PHA has enrolled 79 participants in this program.

Programs to involve PHA youth in positive, career oriented activities served 170 youth at seven Skills for Life sites. All of PHA's youth activities now adhere to the City's Core Standards for Philadelphia's Youth Programs.

In working to bridge the "digital divide", PHA continued to support on-site computer technology labs available to residents as well as continued its mobile computer lab program. PHA opened its newest center at Johnson Homes and also operates labs at Community Centers at Tasker Homes, Harrison Plaza, Norris Homes, and Whitehall, Katie B. Jackson, Spring Garden, West Park, Fairhill, Tasker Older Adult Center, and Blumberg, and planning has begun at Holmecrest and Bartram. PHA also established computer laboratories at Germantown Settlement House, Crusaders for Christ, Cunningham Community Center, and the Lighthouse to serve youth participating in the Skills for Life Program.

Through the non-profit TSSI, PHA expanded efforts to involve public housing and other community residents in improving PHA communities. TSSI is an integral partner in all of PHA's service planning and implementation initiatives.

In an effort to help nursing home eligible seniors continue residing at PHA sites PHA partnered with St. Agnes Medical Center to establish a Living Independently For Elders (LIFE) program. The program serves frail and/or at risk PHA elderly residents. LIFE offers primary and specialty medical care, nursing care, adult day health services, prescribed modifications, meals, homemaker services and other services.

To better encourage a sense of community and esprit de corps for all PHA residents and staff, PHA this year began publishing a PHA residents' newsletter.



Accomplishments Summary

- Accomplishment 1:** Expanded operations at the Family Self-Sufficiency Center at Blumberg Apartments serving 2,589 public housing, HCV and neighborhood residents
- Accomplishment 2:** Assisted 56 new PHA families in becoming homeowners, 39 through the Housing Choice Voucher program, nine (9) from Turnkey III and eight (8) from the 5(h) Homeownership program
- Accomplishment 3:** Opened new Computer Lab and related computer training at the Blumberg Family Self-Sufficiency Center
- Accomplishment 4:** Graduated 62 residents from the Pre-Apprenticeship Training Program
- Accomplishment 5:** Graduated 90 residents from Philadelphia Health Institute Certified Nursing Assistant training programs
- Accomplishment 6:** Provided services to over 3,000 seniors at PHA Senior Centers
- Accomplishment 7:** Assisted 2,657 households to develop economic self-sufficiency action plans
- Accomplishment 8:** Served 232 pre-school youth in the Headstart and child care programs
- Accomplishment 9:** Provided homeownership counseling services to over 500 households
- Accomplishment 10:** Implemented a series of MTW Job Fairs to link residents with available employment, training and support service opportunities

Goal 6: Improve the Productivity and Cost Effectiveness of PHA's Operations.

PHA continued to undertake efforts to improve productivity, fully utilize available resources, and identify opportunities for cost savings. The effectiveness of PHA's efforts is underscored by the A+ credit rating awarded the agency by Standard and Poors. Productivity and cost effectiveness initiatives took many forms during the past year:



PHA Finance Department

- PHA established a new Quality Initiative including creation of a Quality Department and Quality Control staff at each Community Based Management Office. This new initiative will expand in the coming months to provide training, technology and other resources to improve the accuracy of PHA transactions, the quality of customer service and the capacity of staff to work effectively as a team.
- PHA implemented new CRM Help Desk and project management applications to improve staff efficiency and ability to monitor key tasks.
- PHA upgraded PeopleSoft HRMS to greater enhance ability to accurately process and track payroll, timekeeping and records management.
- Through its ongoing energy management system, PHA reduced operating costs by approximately \$90,000 by switching to heating oil instead of gas in certain situations.
- A new program of monitoring water usage has generated \$108,000 in savings by timely termination of Water Department services.
- Through new Quality Control staff combined with continuous staff training efforts, PHA is working to reduce errors associated with the rent calculation and recertification processes. In addition, PHA has contracted with a Low-Income Housing Tax Credit specialist to provide ongoing monitoring, training and oversight of Tax Credit reporting and compliance. These initiatives represent an important component of PHA's proactive efforts to improve productivity and efficiency. As previously noted, PHA was able to meet all of its LIHTC benchmarks during the past year.
- PHA conducted Business Conferences to encourage local and minority businesses to participate in PHA bidding opportunities. The conferences provided information related to Section 3 and Affirmative Action requirements, PHA bid procedures, etc.
- PHA's Contracts and Procurement staff established uniform contract file formats to facilitate audit and inspection.
- PHA began a project to install inventory and warranty tracking software and bar codes. The expectation is that this will save significant funds through warranty coverage of broken or damaged parts and equipment.
- PHA submitted a revised procurement policy to HUD for review and approval using its Moving To Work program regulatory flexibility. Upon implementation, this new system will simplify the procurement process, while ensuring an appropriate level of internal control and external competition. PHA is awaiting HUD approval.
- Utilization of the new PeopleSoft inventory system has resulted in an increase in inventory accuracy to 96%. Also, Cycle counts were performed at all PHA stock locations during the year, thus eliminating the need for a complete year-end physical count. This initiative saved an estimated \$10,000 in overtime costs.
- As part of the Moving To Work Demonstration Program, PHA began implementation of a new initiative to reduce the frequency of income recertifications to every two years (from the current annual system). In addition, PHA is commencing implementation of a recently approved rent simplification system.



Cost Efficiencies

- Approved simplified procurement process
- Approved rent simplification system
- Changed to a two-year income recertification

Accomplishments Summary

Accomplishment 1: Achieved A+ Credit Rating from Standard and Poors

Accomplishment 2: Established new Quality Department and Quality Control staff to assist in improving staff accuracy and productivity

Accomplishment 3: Implemented staff training initiatives for a wide range of positions including Housing Management, Housing Choice Voucher and Inspection staff

Accomplishment 4: Identified over \$108,000 in annual water savings

Accomplishment 5: Prepare revised procurement policy under MTW program

Accomplishment 6: Achieved 96% accuracy rate on inventory cycle counts using enhanced software technology

Accomplishment 7: Established new two-year recertification program using MTW regulatory flexibility

Accomplishment 8: Undertook planning for simplified rent calculation system using MTW flexibility

Accomplishment 10: Reduced energy costs by approximately \$90,000

Goal 7: Improve Program Compliance, Reporting, Performance and Accountability.

PHA's Annual Audit for Fiscal Year 2003 was successfully concluded with no audit findings in terms of compliance testing of internal controls or financial data integrity. In addition, as mentioned under Goal 3, the HUD Office of Inspector General concluded an audit of PHA construction contract administration with no findings of non-compliance or misappropriation.

- PHA remains committed to continuous improvement in all areas in order to improve accountability and compliance. The Authority has enhanced initiatives to improve program compliance and quality including establishment of a new Quality Initiative and the hiring of Quality Control staff.
- PHA implemented new MBE/WBE monthly tracking systems and subcontractor pre-qualification systems.
- PHA was successful in awarding \$36,944,863, or 32% of its contract dollars to minority and female owned businesses. The agency for the first time was able to incorporate Construction Management contracts into a single overall calculation.
- PHA's management initiatives and strategies are incorporated into a comprehensive Strategic Operating Plan developed by senior management staff and monitored monthly by PHA's Quality Department staff. The Strategic Operating Plan incorporates goals, tasks, deliverables and schedules for every operational and policy area of the agency. During the past year, PHA conducted regular meetings of staff focusing on each goal area. Reporting on the Plan is an automated process
- In order to address the increased need for Low-Income Housing Tax Credit (LIHTC) reporting and compliance requirements, PHA implemented new staff training and staff specialists to provide monitoring, training and oversight of agency efforts.
- PHA's Finance Department implemented a series of initiatives to improve the accuracy and timeliness of financial reporting and systems. These include: a new monthly close process to ensure closing by the seventh business day of each month; a comprehensive package of reports produced by the tenth day of each month; and, new quality control procedures for monthly financial reports.
- Intensive staff training was also conducted in Finance and throughout the agency to ensure conformance with policies and procedures, especially in the areas of rent calculations, recertifications, and inspections.

Legal Victories



James A. Byrne U.S. Courthouse

PHA's aggressive legal strategy resulted in numerous major court victories over the past year, saving the Authority millions of dollars, now and in the future.

Eviction Procedures

Brown vs. PHA – In November 2003 PHA won a case where the court vacated a thirty-year old decree regarding eviction proceedings. The practical result is that PHA will be able to move more quickly to evict drug dealers, drug abusers and violent criminals.

Utility Allowances

McDowell vs. PHA – In March 2004 PHA avoided \$5 million in damages by winning a case regarding gas utility allowances. This case alleged that PHA had not followed a 1997 ruling that requires the Authority to adjust gas utility allowances whenever the rate changed by ten percent. PHA was found in compliance.

Lead-Based Paint in Housing Choice Voucher Units

Paige vs. PHA – In late 2003 PHA successfully defeated this Section 1983 civil rights case that sought to require PHA to: (1) comply with federal regulations governing a landlord’s obligations to test for lead-based paint in Housing Choice Voucher units; and (2) provide lifetime medical monitoring to Housing Choice residents’ children who had been exposed to lead. Such obligations would have cost PHA millions of dollars.

Breach of Lease

Ford vs. PHA – In February 2004 PHA successfully persuaded the court that no action exists for a tenant in their claim that PHA failed to properly maintain units. This case sets a precedent for tenants facing eviction for non-payment of rent who- in an attempt to delay their eviction – frequently claim that PHA failed to maintain their units.

Rent Calculations

Phillips vs. PHA – Settlement was reached regarding current and former tenants who believe that PHA failed to disregard their income in calculating their rent. This “income disregard” was a component of the Welfare To Work legislation. PHA avoided a multi-million dollar payout and agreed instead to evaluate claims on a case-by-case basis. This settlement awaits HUD and court approval.

Picketing Restraining Order

PHA vs. Hands On Coalition – PHA secured a permanent order prohibiting Hands On Coalition from picketing PHA construction sites saving valuable time and costs in construction delays.

Whistleblower

Cavicchia vs. PHA – In summer 2003, PHA succeeded in having this whistleblower case dismissed on summary judgment. The plaintiff alleged retaliation by PHA but after a quick but thorough review on all related files and documents the court found no merit to the allegations. An identical allegation was made in the case of Collins vs. PHA, with the same result – dismissal on summary judgment.



Accomplishments Summary

Accomplishment 1: Established, updated and monitored agency-wide Strategic Operating Plan including goals, objectives and performance standards for all elements of agency operations

Accomplishment 2: Met all LIHTC benchmarks

Accomplishment 3: Achieved an A+ Credit Rating based on Standard & Poor’s review of PHA operations

Accomplishment 4: Established new Quality Department to monitor and facilitate achievement of the Strategic Operating Plan

Accomplishment 5: Completed the Annual PHA Audit with no new audit findings

Accomplishment 6: Implemented new monthly close processes to ensure timely closing for financial reports

Accomplishment 7: Established new comprehensive monthly financial reporting system

Accomplishment 8: Awarded 32% of contract dollars to minority and female owned businesses

Accomplishment 9: Implemented new MBE/WBE tracking and reporting systems

Accomplishment 10: Implemented new subcontractor pre-qualification systems

Goal 8: Maximize the use of Technology to Improve the Efficiency and Accountability of PHA Operations.



PHA's Information Systems Management department

Over the past six years, PHA has dramatically upgraded the use of computer technology to expedite and streamline customer service, management reporting and processing of daily transactions. The Information Systems Management (ISM) department includes highly qualified programmers, technical support, networking and other staff whose job is to develop and implement new initiatives, while maintaining and supporting existing applications and systems. ISM also works to ensure that PHA employees are fully equipped with technologies and tools necessary to accomplish their jobs. In the past year alone, hundreds of PHA employees have participated in training sessions designed to improve their computer competency and proficiency.

PHA continues to build upon the activities cited in last year's Standard & Poor's review of PHA operations which noted the agency's "...highly sophisticated technological capabilities" which exceed those of any other PHA's that S&P has evaluated. Key activities from the past year included:

- Implementation occurred over the past several months of the PeopleSoft Customer Resource Management (CRM) application's Helpdesk module for the Housing Choice and Public Housing Program. This software is an industry standard in the private sector; however, PHA is the first Housing Authority to implement this software to manage these activities within a public agency. Employees now have a central automated application to provide instant access to policy and procedures and FAQ's. If an employee's question cannot be answered within the vast knowledge base a ticket can be opened and routed through workflow to management for the proper solution to the problem or question. The solution can then be added to the knowledge base for future lookups.
- The ISM Department completed integration of ECS Housing Choice Voucher HAP and UAP payment system to PeopleSoft AP module in order for all financial processes to reside in Peoplesoft financial modules.
- ISM staff completed implementation of Computer-Based Training for Housing Choice Voucher's Eligibility Department.
- Network upgrades were implemented including replacing existing network cabling to improve network speed. ISM also added management functionality to battery backup systems, completed modifications to cabling infrastructure for main Nortel Passport 8600 switch, and connected all SNMP components to management hubs. To improve efficiency of network management, ISM implemented LANDesk 7.0 Desktop Management System to improve overall support and management of PHA's desktop PCs and installed LANDesk core server and LANDesk client setup and operation 1000+ desktops.
- A series of software upgrades were effectively implemented to enhance end-user tools including: upgraded Windows NT 4.0 Domain to Windows 2000 Active Directory; created new PC Desktop software images; designed functionality of current PHA desktops with proposed Domain/Group Policies enabled.



In addition to the above-completed projects, PHA's ISM staff began work during the past year on a series of additional initiatives which will carry over into the coming months:

- Implementation of PeopleSoft's (CRM) Customer Resource Management application's Support, Correspondence, Field Service, MTW client tracking and

independent customer database tracking systems such as incident, investigations, quality of life, risk management and environmental tracking systems. Initial implementation of these systems started in Nov 2003. Go live for the various modules will take place throughout 2004 and early 2005:

- The CRM Field Service Module will replace PHA's aged legacy work order system. The field service system will be integrated with the PeopleSoft ERP applications such as HRMS/Payroll, Requisitions, Purchase Orders and Inventory Modules.
- The CRM MTW system will allow for specific and accurate tracking of all PHA Clients, to make sure they have positive progression into their 7-year self-sufficiency goals.
- The CRM Risk tracking system is to support activities for PHA Clients and Employees (i.e. case and incident information, capture and filter potential property damage claims, and record confidential claim records).
- The CRM Incident tracking system will enable PHAPD to track unit status, incidents, incident findings and produce summary reports designed to facilitate incident analysis.
- The CRM Quality of Life system will track the entire Public Housing Quality of Life process (i.e. eviction fact sheets, court dates, court dispositions, physical evictions, appeal tracking, etc.)
- The CRM Investigations system will track Housing Choice Voucher programs complaints and issues.
- Upgrading of PeopleSoft 7.5 Financial and Supply Chain Applications to version 8.8 including the redesign of the inventory module, projects module and implementation of the accounts receivable, budgets and treasury modules. Implementation of the accounts receivable module includes the conversion of our public housing rent billing and collections system from the ECS application to PeopleSoft.
- Replacement and upgrade of PHA's 1000+ desktops with a standard image and new security policies.
- Upgrade of PeopleSoft Enterprise Portal 8.4 to 8.8
- Upgrade of Lotus Notes 5 to Version 6.5 inotes Web Based version.
- Implementation of NIKU project management application.
- Implementation of Computer Based Training for Housing Choice Voucher's Leasing Department
- Implementation of PeopleSoft HRMS commitment accounting module for departmental budgets.
- Upgrade of Housing Voucher Choices Handheld Inspection Application to Windows 2000.

Accomplishments Summary

Accomplishment 1: Implementation of PeopleSoft CRM modules

Accomplishment 2: Creation of CRM knowledge databases for HCV, public housing and procurement

Accomplishment 3: Integrated ECS Housing Choice Voucher HAP and UAP payment and financial systems to PeopleSoft AP module

Accomplishment 4: Ongoing support and roll out for new Enterprise Portal application

Accomplishment 5: Implementation of Computer Based Training modules for HCV program

Accomplishment 6: Implementation of various network management upgrades

Accomplishment 7: Completion of software upgrades including Windows NT 4.0

Accomplishment 8: Conducted design work for CRM Support, Correspondence, Field Service and other modules

Accomplishment 9: Developed design and beta versions of MTW tracking software to support effective tracking of MTW self sufficiency goals, referral services, and compliance requirements

Accomplishment 10: Implementation of extensive staff training to support full utilization of new and upgraded applications

respective work areas. Floor captains attended training sessions on CPR and fire safety with presentations by PHA's insurance carrier and the Philadelphia Fire Department. Each floor captain drafted an evacuation plan for their department and distributed them to staff members. Floor captains make regular inspections of egress routes in their buildings to ensure clear passage in case of emergency evacuation.

- PHA's Fire Safety for Residents Initiative continued with new literature and evacuation plans for residents. PHA employees who are retired Philadelphia Fire Fighters attend evening resident meetings where they give presentations about fire safety, distribute literature and answer questions. The literature is also distributed to residents at lease up and annual re-certifications.
- PHA continued its close working relationship with various State of Pennsylvania agencies to support the Pre-Apprenticeship Training Program, provide meals at adult day care and child care centers, and other efforts to promote resident economic self-sufficiency.
- In the area of public safety, PHA's Police Department collaborated with the Attorney General, the Philadelphia Police

Department and other law enforcement agencies to fight drug trafficking and reduce criminal activity in and around PHA developments. Support the Pre-Apprenticeship Training Program, provide meals at adult day care and child care.

- PHA worked with the School District of Philadelphia to ensure that existing school buildings are upgraded in the Mill Creek area.
- PHA worked with the Philadelphia Water Department on Mill Creek Watershed project.
- PHA worked with the Fairmount Park Commission on trees and landscaping at various PHA sites.
- PHA worked with the PA Secretary of Public Welfare to establish a Living Independently For Elders (LIFE) pilot program.
- PHA entered into an agreement with St. Agnes Medical Center to jointly offer this program, which includes senior assisted living and enhanced supportive services. The program is designed to enable nursing home-eligible residents to remain in their homes.



Philadelphia School District CEO Paul Vallas



Accomplishments Summary

Accomplishment 1: Partnered with Revenue Department to check landlord tax and utility delinquency status, resulting in over \$132,000 in delinquent payments made to the City Treasury

Accomplishment 2: Served 500 formerly homeless households in partnership with the City through the "Good Neighbors Make Good Neighborhoods" program

Accomplishment 3: Collaborated with law enforcement agencies to implement the Narcotics Task Force

Accomplishment 4: Obtained \$22 million in new tax credit funding to support PHA development projects from Pennsylvania Housing Finance Agency, bringing total to \$106 million

Accomplishment 5: Obtained continued state funding to support Pre-Apprenticeship Training Program

Accomplishment 6: Obtained state funding for adult day care and childcare meals

Accomplishment 7: Collaborated with City departments to prevent and respond to childhood lead poisoning

Accomplishment 8: Conducted basic systems repairs on 100 properties referred to PHA by the City's Managing Director's office as part of the lead abatement process

Accomplishment 9: Enrolled 79 residents in PA Department of Revenue's funded JRARRE program which provides self-sufficiency counseling and assistance

Accomplishment 10: Improved fire safety awareness and knowledge by staff and residents in partnership with the Philadelphia Fire Department

A Leadership Team that Works



Mayor John F. Street, Chair



Carl R. Greene, Executive Director



Jannie L. Blackwell



Patrick J. Eiding



Nellie W. Reynolds



Debra L. Brady



Philadelphia Housing Authority
Building Beyond Expectations

Carl R. Greene, Executive Director

Board of Commissioners

Mayor John F. Street, Chair
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ACR 06.04