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ADMINISTRATIVE AND REGULATORY COMMITTEE

May 22, 2023

Livestream: <https://www.youtube.com/watch?v=c0pBR7pW0Rw>

HOC's offices are now open to the public. The public is invited to attend HOC's May 22, 2023 monthly Committee meeting in-person. HOC's Board of Commissioners and staff will continue to participate through a hybrid model (a combination of in-person online participation).

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Minutes

HOUSING OPPORTUNITIES COMMISSION OF MONTGOMERY COUNTY

10400 Detrick Avenue
Kensington, Maryland 20895
(240) 627-9425

Administrative and Regulatory Committee Minutes

March 20, 2023

For the official record of the Housing Opportunities Commission of Montgomery County, an open meeting of the Administrative and Regulatory Committee was conducted via a hybrid platform (a combination of in-person and online platform / teleconference) on Monday, March 20, 2023, with moderator functions occurring at 10400 Detrick Avenue, Kensington, Maryland beginning at 4:03 p.m. There was a livestream of the meeting held on YouTube, available for viewing [here](#). Those in attendance were:

Present

Frances Kelleher, Chair – Administrative and Regulatory Committee
Linda Croom – Commissioner

Via Zoom

Pamela Byrd - Commissioner

Also Attending

Chelsea Andrews, Executive Director
Kayrine Brown, Deputy Executive Director
Lucinda Scott
Ken Silverman

Ellen Goff
Michel Ruth
Elliot Rule

Via Zoom

Tim Goetzinger
Aisha Memon, General counsel
Fred Swan

Steven Firth
Lynn Hayes

IT Support

Aries Cruz, IT Support

Commission Support

Jocelyn Koon, Senior Executive Assistant

APPROVAL OF MINUTES

The minutes of November 21, 2022 Administrative and Regulatory Committee meeting was approved upon a motion by Commissioner Croom and seconded by Commissioner Kelleher. Affirmative votes were cast by Commissioners Kelleher and Croom and Byrd.

DISCUSSION/ACTION ITEMS

1. Approval to Amend the HOC Procurement Policy Purchasing Limits for Micro Purchases.

Chelsea Andrews, Executive Director, provided an overview and introduced Michael Ruth, Assistant Procurement Officer and Ellen Goff, Acting Director of Property Management, who provided the presentation.

Staff addressed Commissioners questions. A motion was made by Commissioner Croom and seconded by Commissioner Kelleher, to recommend to the full Commission. Affirmative votes were cast by Commissioners Kelleher, Byrd and Croom.

2. Authorization to Submit HOC's Fiscal Year 2024 Annual Public Housing Agency Plan

Chelsea Andrews, Executive Director, provided an overview and introduced Darcel Cox, Chief Compliance Officer and Elliot Rule, Management and Compliance Analyst, who provided the presentation.

Staff addressed Commissioners questions. A motion was made by Commissioner Croom and seconded by Commissioner Kelleher, to recommend to the full Commission. Affirmative votes were cast by Commissioners Kelleher, Byrd and Croom.

Commissioner Kelleher adjourned the meeting at 4:24pm.

Respectfully submitted,

Chelsea Andrews
Secretary-Treasurer

/pmb

Discussion Items



Overview of the Waitlist and Update on Migration Plans

Administrative & Regulatory Committee

Chelsea Andrews
Executive Director

Darcel Cox
Chief Compliance Officer

May 22, 2023

Richard Congo
Chief Technology Officer

Ken Silverman
Director of Government Affairs

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Executive Summary

- HOC is preparing to migrate our application portal and waitlist management systems from Housing Path to Yardi
- Housing Path was a custom-built solution, which provided HOC an innovative solution to provide a single, always-open portal for application to all of our programs developed when there were no widely available platforms available that provided these features
- Today, Housing Path requires significant, costly maintenance to ensure compliance with changing federal regulations and security best practices, and Yardi has since developed a suite of tools that can meet our needs at a much lower cost

Waiting List Overview

Customer Call-ups

- HOC is required to select customers for housing in an equitable manner. This requires customers to apply to the HOC wait list. Staff selects customers based on the date and time they applied

Site-based Waitlist

- HUD requires HOC to maintain site-based wait-list for properties with project-based vouchers

Automatic Compliance Updates

- Yardi provides automatic updates to meet HUD regulations
 - Will be deploying tools that will allow Applicants to **self** Opt-in, Opt-out on specific Property Waitlists
 - Waitlist, Recertification, Communications with Property Management will become holistic throughout HOC's Property portfolio - creating a central repository that can be better managed/secured

Current System

Housing Path

Housing Path

- Housing Path is a custom system created for management of HOC's application process and waiting list management
- Includes backend tools for waitlist management as well as the front-end application experience for applicants
- Launched in 2015 as a single, integrated, always open online portal
- Prior to Housing Path, HOC maintained separate waitlists for each program, only opened them periodically, and utilized a lottery system for selection rather than a date-and-time selection process

Successes

- Current customer information: annual refresh and renew of information
- Innovative: Perpetually open and online access for applicants

Challenges

- Standalone system: Housing Path cannot be integrated with Yardi and other systems HOC uses for other functions
- Cost: Expensive and time-consuming to perform updates for maintenance, security, new regulatory requirements, or new features
- Outdated: Housing Path system is built on older technology which no longer meets best practices for access control and cyber security

Replacement System

Yardi

Yardi Waitlist Management Suite

- Yardi is a large national technology company which provides a broad suite of solutions for property management, including specialized technologies for Public Housing Authorities
- Yardi is used by thousands of affordable housing and real estate management entities

Advantages

- Current customer information: annual refresh and renew of information
- Innovative: Perpetually open and online access for applicants

Challenges

- Integration: HOC currently uses Yardi for a number of functions, including property management, training, and contract management - integration with waitlist management will improve staff efficiency and customer experience
- Security: Yardi has a strong track record of maintaining secure systems and is able to invest in constant upgrades to ensure the latest best practices are included. Yardi's system provides more tools for fine-grained access control and a more user-friendly experience for staff to reduce the possibility for user error
- Pre-validation: Yardi allows more timely and efficient 'pre-validation' of applicants, reducing the necessary staff time to do process applicants once they are selected
- Compliance: Yardi closely monitors federal regulations and takes responsibility for updating their system to ensure compliance, reducing compliance risk for HOC
- User Experience: Yardi has more modern workflow features and an improved user experience for both applicants and staff
- Cost effective: Yardi's fees are predictable and far lower than our current fees for maintaining Housing Path. Regular updates to ensure security and compliance are included without additional cost

Migration Process

- HOC staff has been testing and evaluating Yardi's waitlist management suite is finalizing the process and schedule to migrate all waitlists to Yardi
- Staff anticipates completing migration this summer, paired with a robust communications effort to ensure applicants understand what this change means for them
- Applicants will be migrated seamlessly with their date/time placement on each list preserved
- Individual property-based waitlists will be established for all HOC Properties, ensuring compliance with federal regulations
- Applicants will have the opportunity to review their current waitlist selections and update them, including newly-created waitlists for all properties
- Prior to a public rollout, HOC plans an intensive testing phase, including focus groups and beta testing using HOC employees

Enhancing Customer Experience

Staff plans to maintain current HOC protocols across the migration process to ensure all applicants maintain their current place on all waiting lists. However, in consideration of the client experience, staff are considering several operational modifications and efficiency improvements:

- Customer call-ups: HOC staff is exploring how automated options and new channels such as robocalls and text messages could ease the staff time burden in contacting selected applicants and reduce the time it takes to fill vacancies
- Annual renewals: We will continue to require applicants to refresh and renew their applications annually to ensure up-to-date information
- New opportunities: Currently, applicants are notified of new properties or vouchers and required to update their application to be added to those wait lists. Should they have the option to be automatically added to these waitlists if they are eligible

Summary/Conclusion

No action required

- This briefing is to provide information to the Committee as HOC staff makes operational improvements to our waitlist management in coming months

The migration will better serve HOC staff, customers, and applicants

- The new system will provide an easier to use, more reliable system for all stakeholders without altering the priority or placement of existing applicants
- As we explore the full functionality of an integrated Yardi system, there are opportunities for future improvements and efficiencies
- Once fully transitioned, HOC will save hundreds of thousands of dollars in annual maintenance, compliance and security upgrades that would have been necessary for our current custom-built system

Adjourn