



# The Road Home

BUILDING A SAFER,  
STRONGER, SMARTER LOUISIANA

## ***The Road Home*** **Week 109 Situation & Pipeline** **Report**

August 5, 2008





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## EXECUTIVE SUMMARY

### Homeowner Assistance Program

Homeowner Program Advisors completed 270 RHAS appointments with applicants during the reporting period. The number of benefits calculated increased to 160,222 and the total number of closings held as of July 31 increased to 115,918. Cumulatively, homeowners returned 142,081 benefit options selection letters.

**Table 1: Homeowner Program Snapshot**

Activity	As of COB July 24	Weekly Activity	As of COB July 31	Status Adjustments	
				Inactive	Ineligible
Applications Received	229,409	-	229,409		
Applications Not Valid for Processing			44,303		44,303
Applications Recorded	185,106	-	185,106		
Pre-Appointment Inactives			19,149		19,149
Total Appointments Held	223,478	270	223,748		
<i>Initial Appointments Held</i>	166,093	-	166,093	976	7,419
<i>RHAS Appointments Held</i>	57,385	270	57,655		
Benefits Calculated	160,192	30	160,222		
Benefit Options Letters Sent	152,050	45	152,095	1,099	556
<b>Total Benefit Options Letters Returned</b>			<b>142,081</b>		
<i>Number of Option One Selections</i>	124,111	103	124,214	1,860	2,285
<i>Number of Option Two Selections</i>	10,085	7	10,092	223	105
<i>Number of Option Three Selections</i>	2,843	(3)	2,840	159	26
<i>Decline Benefits</i>	2,175	2	2,177	102	24
<i>Delay Benefits</i>	2,675	(45)	2,630	308	106
<i>Incomplete Benefit Selection Form</i>	130	(2)	128	16	25
<b>Benefit Options Letters Available for Transfer to Closing</b>			<b>132,488</b>		
Files Transferred for Closing	121,907	378	122,285	1,268	38
Total Inactives and Ineligibles				6,011	74,036
Closings Scheduled			260		
Closings Held	115,660	258	115,918		

### Small Rental Property Program

Small Rental continues to process active awardees for Round 1 and 2. Small Rental has begun processing the Round 2.1 (Waitlist) conditional awardees who have returned the signed conditional award acceptance.

**Table 2: Rental Program Snapshot**

Activity	Round 1	Round 2	Round 2 Waitlist (Round 2.1)	Program Total
<b>RENTAL UNIT AWARDS</b>				
Total Conditional Awards Issued	2,702	5,032	1,996	<b>9,730</b>
Manual Conditional Awards Issued/Appeals Approved	0	5	7	<b>12</b>
Conditional Awards Cancelled	1,983	1,349	384	<b>3,716</b>
Conditional Awards Reinstated	54	54	3	<b>111</b>
Total Active Awards *	773	3,742	1,622	<b>6,137</b>
Commitment Letters Mailed	642	2,596	398	<b>3,636</b>
<b>OWNER OCCUPIED UNIT AWARDS</b>				
Active OO Unit Awards	142	139	33	<b>314</b>
OO Unit Award Letters Mailed	146	119	18	<b>283</b>

\* Includes 30 applications reinstated through the Appeals Process.

### Deliverables

Table 3 lists the deliverables provided during the reporting period.

**Table 3: Program Deliverables**

Del. ID	Deliverables	Date
00081-07152008	Property Report July 2008	07/25/2008
00002-07302008	Cash Flow Projection Report	07/30/2008
00052-07312008	Analysis of Facility Use July 2008	07/31/2008
00053-07312008	Report on Subcontractor Activity July 2008	07/31/2008
00086-07312008	Update HR Policy July 2008	07/31/2008



**HOMEOWNER PROGRAM**

**Figure 1: Homeowner Assistance Program Pipeline - Applicant Input and Calculation**

	HOMEOWNER PROCESS	CUMULATIVE As of 7/24	CUMULATIVE As of 7/31	INCREASE
<b>APPLICATIONS &amp; APPOINTMENTS</b>	APPS RECEIVED	229,409	229,409	-
	APPS RECORDED	185,106	185,106	-
	PRE-APPT INACTIVE APPS	19,149	19,149	-
	INITIAL APPTS HELD	166,093	166,093	-
	RHAS APPTS HELD	57,385	57,655	270
<b>CALCULATIONS</b>	BENEFITS CALCULATED	160,192	160,222	30
	<b>TOTAL</b>	<b>\$9.35 billion</b>	<b>\$9.35 billion</b>	<b>\$ - b</b>
	<b>AVERAGE</b>	<b>\$60,644</b>	<b>\$60,594</b>	

- 166,093 applicants have completed initial appointments

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- The \$9.35 billion total and \$60,594 average award represent maximum benefit if ALL applicants select Option 1 – rebuild in place (the total includes additional compensation grant calculations, compensation grants, and elevation grants, but does not include ‘zero’ grant awards)

**Figure 2: Homeowner Assistance Program Pipeline – Option Selection and Closing Processing**

		HOMEOWNER PROCESS	CUMULATIVE As of 7/24	CUMULATIVE As of 7/31	INCREASE
<b>OPTION SELECTION</b>	OPTIONS LETTERS SENT		152,050	152,095	45
	OPTIONS LETTERS RETURNED		142,001	142,081	80
	BSF AVAIL FOR TRANSFER TO CLOSING		132,370	132,488	118
<b>CLOSINGS</b>	TRANSFERRED TO CLOSING		121,907	122,285	378
	INACTIVE CLOSING FILES		1,135	1,268	133
	CLOSINGS HELD		115,660	115,918	258
	<b>TOTAL</b>		<b>\$6.80 billion</b>	<b>\$6.82 billion</b>	<b>\$.02 b</b>
	<b>AVERAGE*</b>		<b>\$58,782</b>	<b>\$58,806</b>	

- Applicants have returned 142,081 Benefits Selection Forms. After processing and review, 132,488 of these forms are available for transfer to closing agents for further processing.
- Applicants' initial option selections are in Appendix A

- \*Extrapolation of average award for populations where funds have been disbursed

*See the Glossary for explanation of Figure 2 terms*

### Housing Assistance Center Activity

- A total of 270 RHAS appointments were held at the Housing Assistance Centers for the reporting week.
  - Road Home Advisory Services (RHAS) activity increased slightly from the previous reporting period
    - 57,655 total RHAS appointments held to date
    - 262 RHAS appointments were due to walk-ins

### Award Calculation Activity

- The *Road Home* has calculated 160,222 benefits, an increase of 30 for the week
  - The average total benefit calculated was \$60,594 (excluding ‘zero’ awards)
  - 5,919 calculations resulted in ‘zero’ grant amounts
  - 154,303 ‘non-zero’ or ‘positive’ grant amounts were calculated

### Award Selection Activity

- A total of 142,081 homeowners have returned a benefits options letter (Table 1)
- Of the homeowners who have selected their options:
  - 31,578 options selection letters have been returned from elderly applicants (Table 4)
  - The vast majority of all homeowners, including elderly homeowners, have selected Option 1 to keep their homes
  - 132,488 benefits options letters are available for transfer to closing agents
- Appendix A summarizes the option selection of applicants by Parish
- Appendix B lists the benefits calculated by Parish

**Table 4: Cumulative Elderly Benefits Options Selection**

Elderly Benefits Options Selected	
<i>Number of Option One</i>	26,279
<i>Number of Option Two</i>	3,125
<i>Number of Option Three</i>	2,174
<b>Total Elderly Benefits Options Selected</b>	<b>31,578</b>

### Low/Moderate Income Households

- A total of 115,899 applicants had gone to closing and received their Road Home disbursement as of July 31, 2008. Of these applicants, 49,637 (43 percent) were documented as LMI.
- A total of \$6,815,572,327 in Homeowner Assistance Program awards were disbursed as of July 31, 2008. Of these disbursements, \$3,477,219,423 (51 percent) went to applicants documented as LMI.
- Extrapolating to the 115,918 awards that have closed for a total of \$6.82 billion, approximately \$3.47 billion will be documented as LMI.



# Weekly Situation & Pipeline Report

## Week 109

July 25 – July 31, 2008

**Table 5: Options Selected Activity**  
**Total Household and Low/Moderate Income (LMI) Detail**

Option Selected	Option 1	Option 2	Option 3	Totals
Number of Options Selected	124,214	10,092	2,840	137,146
Total \$ in Options Selected	\$6,671,516,161.20	\$791,884,219.45	\$186,670,987.83	\$7,650,071,368.48
Comp Grant \$ in Options Selected	\$4,805,024,503.53	\$592,945,349.31	\$186,670,987.83	\$5,584,640,840.67
Elev Grant \$ in Options Selected *	\$556,345,646.67			\$556,345,646.67
ACG \$ in Options Selected	\$1,310,146,011.00	\$198,938,870.14		\$1,509,084,881.14
Number of Options Selected by LMI	52,807	4,506	1,169	58,482
Total \$ to LMI	\$3,532,709,492.44	\$434,779,287.98	\$76,570,579.67	\$4,044,059,360.09
Comp Grant \$ to LMI	\$1,960,782,736.12	\$235,840,417.84	\$76,570,579.67	\$2,273,193,733.63
Elev Grant \$ to LMI *	\$261,780,745.32			\$261,780,745.32
ACG \$ to LMI	\$1,310,146,011.00	\$198,938,870.14		\$1,509,084,881.14
% of Total Options Selected that are LMI	43%	45%	41%	43%
% of Total \$ to LMI	53%	55%	41%	53%
% of Comp Grant \$ to LMI	41%	40%	41%	41%
% of Elev Grant \$ to LMI	47%	N/A	N/A	47%
% of ACG \$ to LMI	100%	100%	N/A	100%

\* Due to changes in the Elevation program, Elevation grant dollars reported are now based on actual rather than projected dollars.

**Table 6: Closings Held Activity including LMI Detail**  
**Total Household and Low/Moderate Income (LMI) Detail**

Closings Held	Option 1	Option 2	Option 3	Totals
Number of Closings Held	107,364	6,820	1,715	115,899
Total \$ in Closings Held	\$6,093,517,457.95	\$591,812,277.79	\$130,242,591.58	\$6,815,572,327.32
Comp Grant \$ in Closings Held	\$4,629,838,929.54	\$445,786,587.91	\$130,242,591.58	\$5,205,868,109.03
Elev Grant \$ in Closings Held	\$171,236,725.48	\$29,295.00		\$171,266,020.48
ACG \$ in Closings Held	\$1,292,441,802.93	\$145,996,394.88		\$1,438,438,197.81
Number of Closings Held by LMI	45,764	3,158	715	49,637
Total \$ to LMI	\$3,109,610,467.30	\$313,126,720.63	\$54,482,235.36	\$3,477,219,423.29
Comp Grant \$ to LMI	\$1,858,600,162.76	\$177,707,171.03	\$54,482,235.36	\$2,090,789,569.15
Elev Grant \$ to LMI	\$80,297,692.62			\$80,297,692.62
ACG \$ to LMI	\$1,170,712,611.92	\$135,419,549.60		\$1,306,132,161.52
% of Total Closings Held that are LMI	43%	46%	42%	43%
% of Total \$ to LMI	51%	53%	42%	51%
% of Comp Grant \$ to LMI	40%	40%	42%	40%
% of Elev Grant \$ to LMI	47%	N/A	N/A	47%
% of ACG \$ to LMI	91%	93%	N/A	91%

### Elevation Program Activity

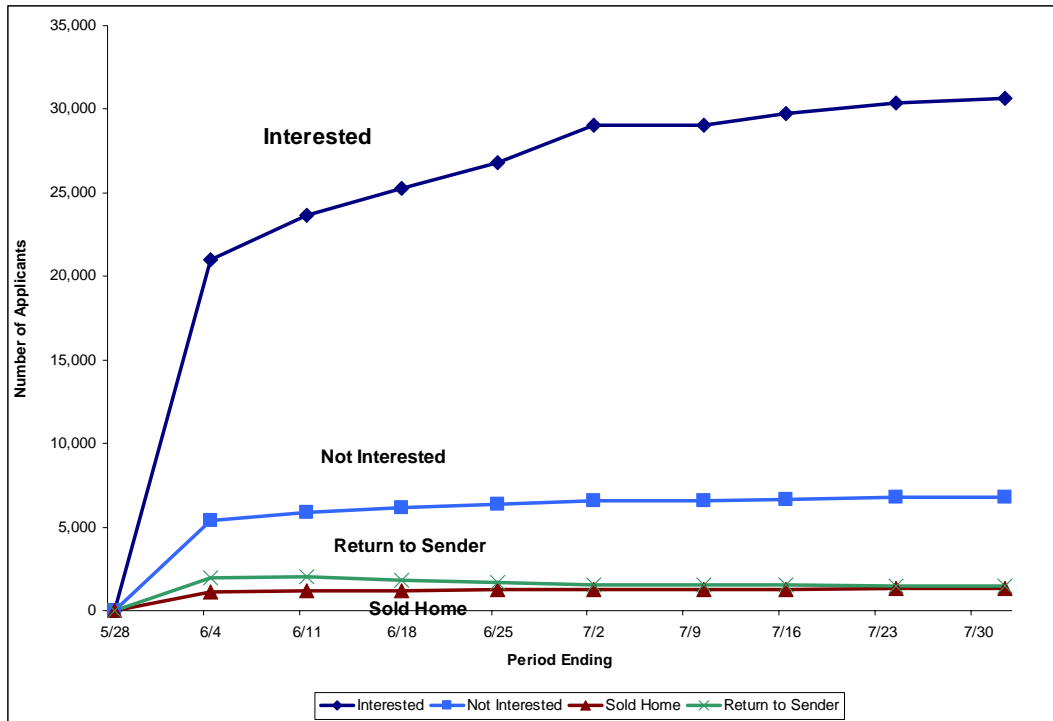
As of July 31, 113,624 Elevation letters have been sent to applicants.

- 30,788 (27%) applicants have returned letters expressing their interest in participating in the elevation program. See Figure 3 for a summary of Elevation Letter Response Activity
- 5,033 applicants have received elevation disbursements totaling \$133,454,768 (average elevation award of \$26,516) including:
  - 3,028 initial and 87 additional disbursements of elevation funds in 2008 for a total of \$88,718,284
  - 1,918 disbursements previously distributed for a total of \$44,736,484
- 1,662 elevation requests for a total of \$48,040,650 are currently at the closing companies for processing. See Table 7 and Figure 4 for summary of Elevation Disbursement Activity

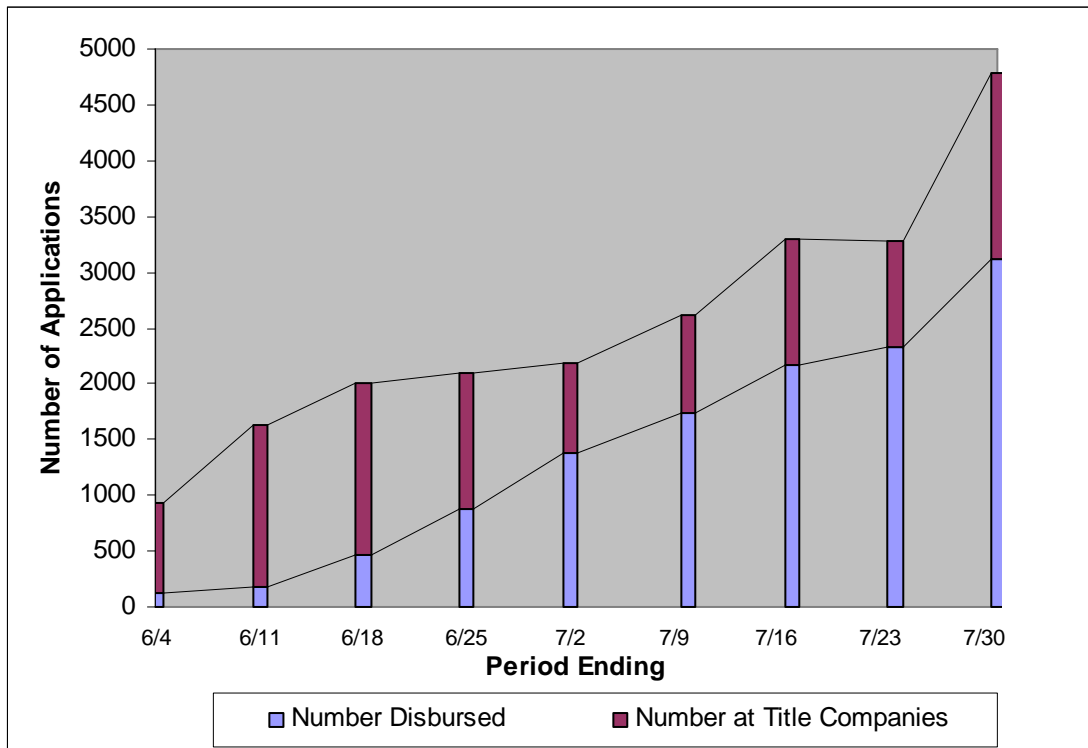
**Table 7: Elevation Disbursement Activity**

	# of Disbursements	Total \$ Disbursed
Previous Elevation Disbursements	1,918	\$44,736,484
2008 Elevation Disbursements	3,115	\$88,718,284
<b>Total Elevation Disbursements</b>	<b>5,033</b>	<b>\$133,454,768</b>
Applications at Title Companies		
First American Pending Transactions	1,000	\$28,854,059
HGI Pending Transactions	662	\$19,186,591
<b>Total Pending Transactions</b>	<b>1,662</b>	<b>\$48,040,650</b>

**Figure 3: 2008 Elevation Letter Response Activity**



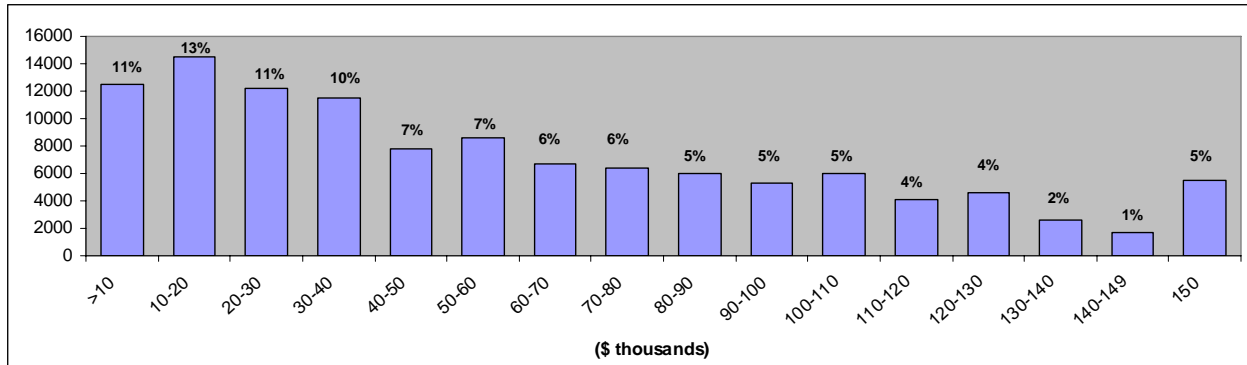
**Figure 4: 2008 Elevation Disbursement Activity**



### Closing Activity

- As of July 31, 2008, a total of 122,285 files were transferred to closing agents, 378 files were transferred during the reporting week. Currently, 1,268 of the files transferred are in inactive status due to situations concerning mortgage or title issues.
- The closing team assisted closing agents with the completion of 258 closings
- Of the total 115,918 cumulative closings:
  - The average award is \$58,806
  - 49,637 also received additional compensation grants. The average additional compensation grant award is \$28,979
  - Closed 26,325 elderly applicants for a total of \$1,841,651,010
  - Appendix C reports Closings by Parish and Zip Code
- To date, the closing agents have completed 5,469 additional disbursements for a total of \$171,164,853
  - The average additional disbursement is \$31,297

**Figure 5: Award Size**



\*Detailed closing data is based on population of 115,899, rather than 115,918 reported in Daily Governor's Report as of July 31, 2008, due to a variance in data feeds.

**Table 8: Pre-Closing Tracking Report**

ACTIVITY	Fri 7/25	Sat 7/26	Sun 7/27	Mon 7/28	Tues 7/29	Wed 7/30	Thurs 7/31	Weekly Total
Files Transferred for Closing	20	-	-	-	358	-	-	<b>378</b>

**Table 9: Applicants and Closings Held By Race/Ethnicity**

Race	Applicants		Closings Held	
	#	%	#	%
American Indian/Alaska Native	666	>1%	15,684	14%
American Indian/Alaska Native and White	530	>1%	461	0%
American Indian/Alaskan Native/Black-African American	379	>1%	334	0%
Asian	2,925	2%	264	0%
Asian and White	300	>1%	1,951	2%
Black/African American	65,837	36%	195	0%
Black/African American and White	1,153	1%	48,263	42%
Native Hawaiian/Other Pacific Islander	183	>1%	821	1%
Other Multi-Racial	3,419	2%	121	0%
White	72,046	39%	2,333	2%
A race was not provided	37,668	20%	45,472	39%
	<b>185,106</b>		<b>115,899</b>	

\*Detailed closing data is based on population of 115,899, rather than 115,918 reported in Daily Governor's Report as of July 31, 2008, due to a variance in data feeds.

### Condominium Project

Following the approval of policies for condominium evaluations, a special project was begun to identify and move condominium properties to closing. To date the project has yielded the following progress summarized in Table 10.



# Weekly Situation & Pipeline Report

Week 109

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**Table 10: Condominium Pipeline Progress**

Activity	Prior Total	6/27-7/03	7/04-7/10	7/11-7/17	7/18-7/24	7/25-7/31	Current Total
Total number of Condo Applications	1,065	-	-	-	-	-	1,065
Total CSIR forms mailed	1,097	-	-	-	-	-	1,097
Total CSIR forms received	1,113	-	-	-	-	-	1,113
Total Evaluations Requested	1,097	-	-	1	-	-	1,098
Total Evaluations Completed	1,023	-	-	-	1	-	1,024
Total Option Calculations Completed	848	6	-	-	4	-	858
Option Letters Created	817	6	-	-	4	-	827
Option Letters Mailed*	817	6	-	-	4	-	827
Option Letters Received	529	2	-	-	1	-	532
Transmitted for Closing	267	4	8	13	2	1	295
Closings Held	200	20	3	2	2	20	247
Elevation Only Awards	188	-	-	-	-	-	188
Inactive Applications	397	(151)	-	-	(27)	3	222
Ineligible Applications	137	22	-	-	(32)	5	132

\*This count is also included in the overall Road Home option letter count.

## Manufactured Home Project

Following the approval of the policies for manufactured home evaluations and Pre-Storm Values for manufactured homes without land, a special manufactured home project was begun utilizing staff from the Calcasieu Housing Assistance Center. Efforts have resulted in 87% manufactured home applications being released into the letter generation process. To date the project has yielded the following progress summarized in Table 11:

- Have identified 16,268 manufactured home applicants to date
- Well into process of updating/ensuring valid HEs are in data warehouse
- Working through PSV process
  - For nearly all cases, we have established whether or not land is owned – used application data or called homeowner
  - Where land is owned, have determined whether or not the existing BPO is based on manufactured home comparables; if not ordered new BPO
  - Received special set of NADA data for values as of August 2005 on 3/9/07
  - Confirmed 14,237 loaded PSVs (*BPOs, N.A.D.A, Road Home Appraisals, and Applicant-provided Appraisals*) meet MH policy
- Letter generation underway



# Weekly Situation & Pipeline Report

## Week 109

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**Table 11: Manufactured Home Pipeline Progress**

Activity	Prior Total	6/27-7/03	7/04-7/10	7/11-7/17	7/18-7/24	7/25-7/31	Cumulative Total
Total number of Manufactured Home Applications	16,232	1	3	27	1	4	<b>16,268</b>
Total Manufactured Home Evaluations verified	15,986	(3)	3	12	1	22	<b>16,021</b>
Total Pre-Storm values verified	14,076	61	23	23	32	22	<b>14,237</b>
Total Applications released into letter generation process	14,065	61	31	25	32	22	<b>14,236</b>

### Home Evaluations (Home Inspection) Activity

**Table 12: Home Evaluation Team Metrics**

ACTIVITY	Prior Total	6/27-7/03	7/04-7/10	7/11-7/17	7/18-7/24	7/25-7/31	Current Total	Five Week Average
Work Orders Submitted by Housing Advisors	165,088	2	3	3	2	5	165,103 <sup>a</sup>	<b>3</b>
Work Orders Dispatched	162,879	4	2	4	2	5	162,896	<b>6</b>
Evaluations Completed in the Field	160,760	-	214	12	6	12	161,004 <sup>b</sup>	<b>49</b>

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

<sup>b</sup> Totals include original and re-evaluations.

- Addressed 15 Strike and Stealth Team issues
- Addressed 53 appeals
- Addressed 40 CAD disputes
- Addressed 8 State Appeals
- Addressed 10 Critical issues
- Completed 25 Option Selection calls
- Addressed 20 FEMA eligibility appeals
- Conducted 575 grant reviews
- Addressed 44 Structure type issues
- Completed 44 Elevation Grants
- Addressed 20 Pre-Closing Issues
- Addressed 14 Elevation appeals



# Weekly Situation & Pipeline Report

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- Reviewed 12 post-Accepted evaluation edit cases and identified 2 cases for additional review

### Appeals

As of July 31, 2008, 11,843 cases have been processed through the Appeals department, 9,484 have been resolved and 2,359 are active. Table 13 shows the status of these cases.

**Table 13: Status of Appeals**

ACTIVITY	As of COB 7/03	As of COB 7/10	As of COB 7/17	As of COB 7/24	As of COB 7/31
<b>Total Cases Processed in Appeals</b>	10,891	11,114	11,281	11,613	11,843
<b>Appeal Cases Pending Decision/Research</b>	1,772	1,887	1,896	2,074	2,119
<b>Ineligible Status Appeal</b>	402	374	309	256	240
<b>Total Active Cases</b>	2,174	2,261	2,205	2,330	2,359
<b>Total Cases Resolved</b>	<b>8,717</b>	<b>8,853</b>	<b>9,076</b>	<b>9,283</b>	<b>9,484</b>

Further analysis of the resolved appeals cases (9,484) shows that:

- 3,315 (35%) have resulted in additional funds being awarded to applicants for a total of \$82,396,708. The average additional disbursement is \$24,856
- 342 (4%) resulted in a reduction of award for a total of \$4,937,430. The average reduction is \$14,437
- 2,764 (29%) resulted in no change to the award amount
- 3,063 (32%) were reviewed for an eligibility determination, 1,262 were approved and 1,801 were denied

As of July 31, 2008 there were 795 appeal cases transferred to the State appeals process and of the 795 cases, 505 are closed, and 290 are in progress.

**Table 14: Status of State Panel Review Appeals**

ACTIVITY	As of COB 7/24	As of COB 7/31
<b>Total Cases Requested for State Panel Review</b>	795	795
<b>State Appeal Cases in Progress</b>	326	290
<b>State Appeal Cases Resolved</b>	<b>471</b>	<b>505</b>

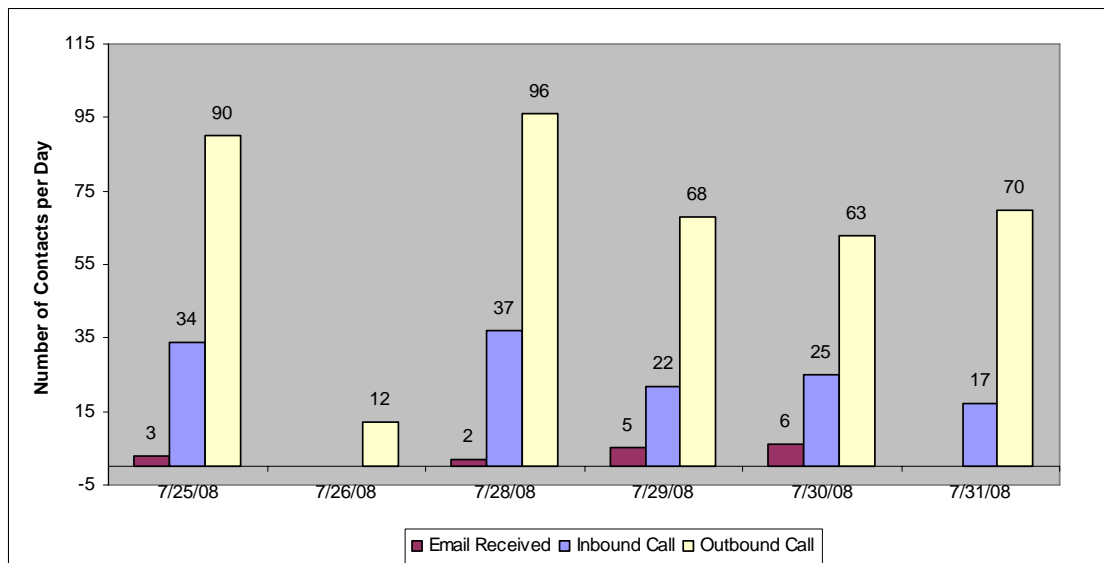
### Personal Application Liaisons (PAL)

During the reporting week, 550 contacts were made through the PAL initiative. Table 15 and Figure 6 detail these contacts by type and day.

**Table 15: PAL Metrics**

ACTIVITY	Prior Total	6/27-7/03	7/04-7/10	7/11-7/17	7/18-7/24	7/25-7/31	Current Total
Email Received	927	30	13	17	31	16	1,034
Inbound Calls	14,422	66	57	133	126	135	14,939
Outbound Calls	52,179	354	276	653	489	399	54,350
<b>Total Contacts</b>	<b>67,528</b>	<b>450</b>	<b>346</b>	<b>803</b>	<b>646</b>	<b>550</b>	<b>70,323</b>

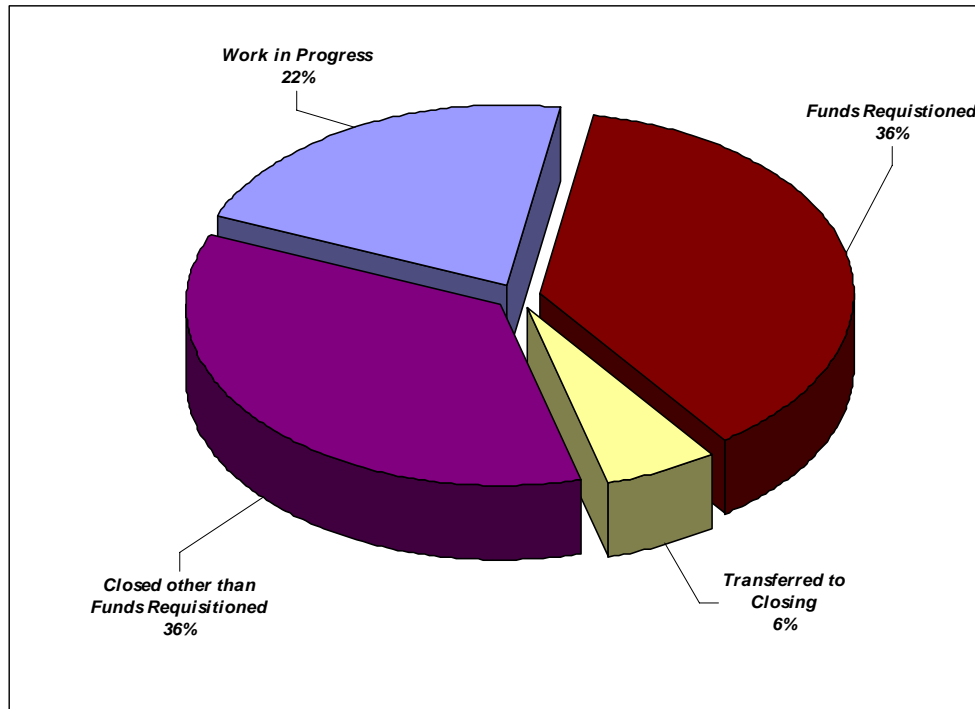
**Figure 6: PAL Contacts by Day**



As of July 31, 2008, a total of 36,217 applicant files have moved forward through the PAL initiative. Figure 7 shows the PAL application breakdown.

- A total of 7,790 applicant files are being worked by PAL staff
- A total of 28,427 applicant files have progressed to the closing process as the result of PAL efforts
  - 2,109 have been transmitted to closing
  - 13,457 have closed and are at a status of Funds Requisitioned
  - 12,861 have closed and are at a status of other than Funds Requisitioned

**Figure 7: PAL Application Breakdown**



Additionally, Table 16 shows a breakdown of issues by categories that are being handled through the PAL initiative. No PAL issues were transferred to Appeals during the reporting week.

**Table 16: PAL Issues by Category**

Issue Category	# Apps
Advisory Services	1
Affordable Compensation Loan	43
APPEALS	58
Applicant Info	138
Application Completion	58
Appraisal	89
BPO	19
CREDCO	108
Delay of Benefit	74
ECD	53
EGrant Calculation	87
Elevation	28
FEMA	28
FEMA Ind Assist	17
Flood Ins (NFIP)	1
Grant Recovery	3
Grant Review	12



# Weekly Situation & Pipeline Report

## Week 109

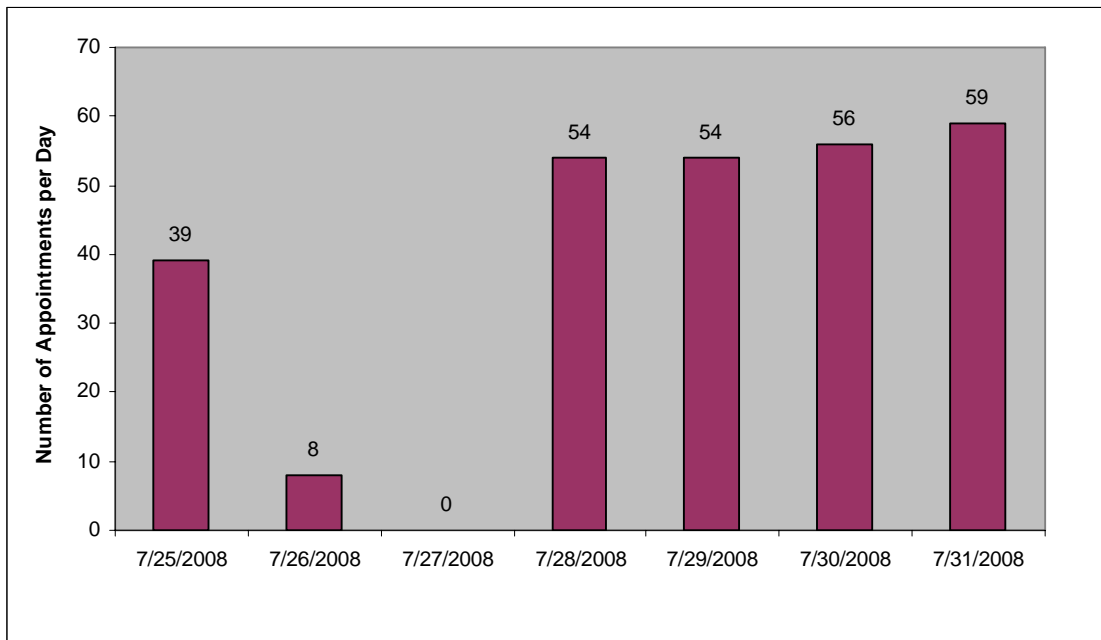
July 25 – July 31, 2008

Issue Category	# Apps
Home Evaluation	115
Homeowner dispute or decision pending	312
Info Request	22
Insurance	78
Legal Costs	1
Missing Documentation	728
Multiple Issues	133
Option Change	14
Option Letter	56
Other	488
Outlier	15
Owner Occupancy	218
Ownership	481
Parish Damage	4
Policy Appeal	27
Pre-Storm Value	97
Program eligibility pending	207
Request Appraisal	2
SBA	1
Status Change	103
Title	680
Title - Post Closing	2
Zero Benefit	186
<b>Total</b>	<b>4,787</b>

### Housing Assistance Center Appointment Activity

There were a total of 270 RHAS appointments held at the Housing Assistance Centers during the reporting period. The Centers continued to see applicants on Saturdays (Figure 8).

**Figure 8: Housing Assistance Center RHAS Appointments by Day**



**Table 17: Housing Assistance Center Appointments by Week**

ACTIVITY	Prior Total	6/27-7/03	7/04-7/10	7/11-7/17	7/18-7/24	7/25-7/31	Current Total	Five Week Average
<b>RHAS Appointments Held</b>	56,345	309	197	268	266	270	<b>57,655</b>	<b>262</b>
<b>Average Daily RHAS Appointments Held</b>		52	33	45	44	45		

Figure 9 shows the number of RHAS appointments scheduled and actual appointments held by Center. The percentage for each Center represents the number of scheduled appointments that were actually held. There were 262 walk-ins for RHAS appointments during this reporting period.

Figure 9: RHAS Scheduled, Held and Walk-Ins by Center

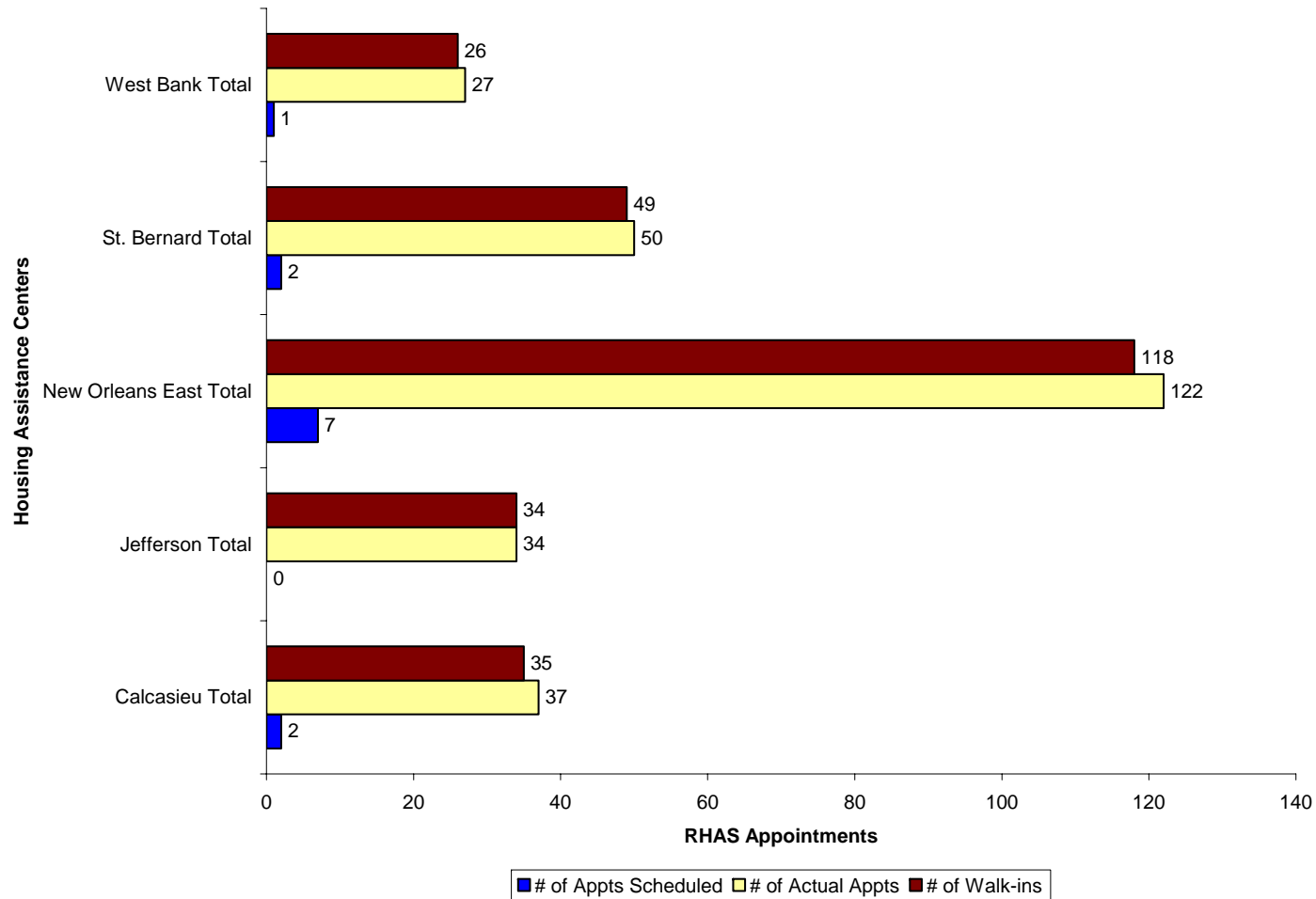
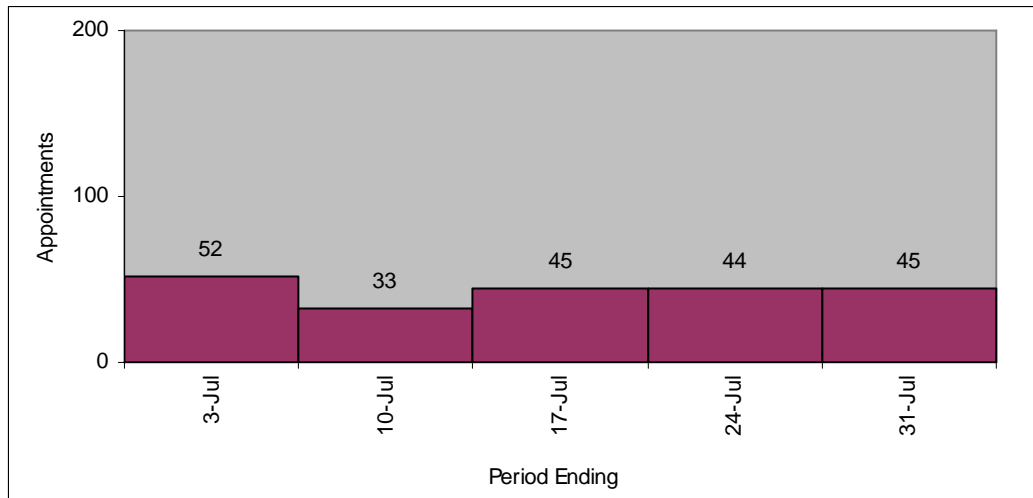


Figure 10 shows the average number of RHAS appointments per day over the current and previous periods.

**Figure 10: Average Daily Appointments by Period**



## RENTAL PROPERTY PROGRAM

### Underwriting

- Continued processing of returned, signed Round 1 and 2 Conditional Award documents (See Table 18)

**Table 18: Conditional Award Processing**

	Round 1		Round 2		Round 2 Waitlist (Round 2.1)	
<b>CONDITIONAL AWARD STAGE</b>						
Conditional Awardees	2,702		5,032		1,996	
Manual Conditional Awards Issued/Appeal Approved	0		5		7	
<b>VERIFICATION STAGE</b>						
Active Awards	773		3,742		1,622	
<b>COMMITMENT LETTER STAGE</b>						
Commitment Letters Mailed	642		2,596		398	
Commitment Letters Returned by Applicant		453		1,222		70
<b>POST COMMITMENT STAGE</b>						
0 - 24% Construction Complete		119		441		11
25 - 49% Construction Complete		50		120		11
50 - 74% Construction Complete		41		108		7
75 - 100% Construction Complete		243		553		41
Total	453		1,222		70	

### Appeals

- Received 14 new appeals
- Completed 20 Appeal Review Determinations
- Researched and resolved 15 requests for Constituent Services
- Mailed 31 Determination letters

**Table 19: Status of Appeals**

Appeals	Round 1	Round 2	Round 2 Waitlist (Round 2.1)	Program Total
Level II Issues Received	289	432	540	<b>1,261</b>
Level II Issue Determinations Made	273	391	522	<b>1,186</b>
Level II Issues Remaining to be Resolved	16	41	18	<b>75</b>

**Table 20: Appeals Determinations Summary**

Appeals Determination After Road Home Review	Cumulative Total
Approved	218
Denied	885
Dismissed	73
Withdrawn	10

### Owner Occupant (OO) Units

- Mailed additional OO Letters
- Submitted OO files to QC for pre-closing review and pre-letter review

**Table 21: Owner Occupant Award Activity**

Owner Occupant Unit Awards	Round 1	Round 2	Round 2 Waitlist (Round 2.1)	Program Total
Active OO Unit Awards	142	139	33	<b>314</b>
OO Unit Award Letters Mailed	146	119	18	<b>283</b>
No Acceptance Required	22	25	0	<b>47</b>
Award Cancelled Post Mailing	2	2	0	<b>4</b>

### Tier 2 Call Center

- Answered applicants' questions on de-obligation, denial, contradictory, incomplete letters and status of their Round 1 & 2 applications

**Table 22: Tier 2 Call Center Metrics**

Inbound Calls	
Round 1	18
Round 2	102
Round 2 Waitlist (Round 2.1)	116
Other	40
<b>Total Inbound Calls</b>	<b>276</b>

### Financial Advisors

- Coordinated upcoming Outreach Events
- Scheduled and completed appointments with applicants who request financial advice or counseling

**Table 23: Financial Advisor Appointment Activity**

Financial Advisor Appointments	Cumulative Total
Applicants Contacted	2,327
Appointments Not Required	1,157
Appointments Required	1,170
Appointments Completed	877
Appointments to be Completed	293

### URA

- Continued to process URA case files by scheduling appointments with owners and tenants

**Table 24: Relocation Activity**

Occupied Properties				
Owner Occupants with Tenants	Round 1	Round 2	Round 2 Waitlist (Round 2.1)	Program Total
Total Rental Units	178	82	2	262
Tenant Occupied (Relocation possibly needed)	115	52	2	169
Vacant Units	63	34	0	97
General Pool with Tenants	Round 1	Round 2	Round 2 Waitlist (Round 2.1)	Program Total
Total Rental Units	66	329	50	445
Tenant Occupied (Relocation possibly needed)	53	239	45	337
Vacant Units	13	90	5	108

## **PROGRAM SUPPORT STATUS**

### **LOGISTICS**

- Continued preparing for mobile events in August including:
  - August 5- Terrebonne: Terrebonne Civic Center
  - August 7- Calcasieu: Lake Charles Civic Center
  - August 9- Orleans: UNO Lindy Boggs Conference Center
  - August 12- Jefferson: Alario Center
  - August 14- St. Bernard: Crystal Palace
  - August 19- St. Tammany: Northshore Harbor Center
  - August 21- Vermilion: Holiday Inn
  - August 24- Calcasieu: Lake Charles Civic Center
  - August 26- Orleans: Gallier Hall (contract not signed, in process of being drawn up)
  - August 28- Plaquemines: St. Patrick's Church

### **HUMAN RESOURCES**

- Customized and conducted the first of three HUD Section 3 Training Workshops focusing on -- "*Revitalizing Employment Opportunity - Outpacing a Challenging Economy*" for sub-income persons seeking new or expanded job options for the energy industry in South Louisiana and Gulf of Mexico, in partnership with LA Work/Career Solutions Center & Workforce Connection, located in Houma

- Visited LA Works Career Solutions Center in Lafayette to review Training Options available for low- and very-low-income persons, veterans, people with disabilities and individuals living in public housing under the HUD Section 3 Partnership Program
- Designed and conducted a special Training Workshop for unemployed clients, emphasizing continuing education options offered to displaced worker by the Louisiana Workforce Commission, In partnership with LA Works/Career Solutions Center for Ascension Parish, located in Gonzales
- Completed design of new series of Training Seminars for LA Works of East St. Tammany Parish, located in Slidell
- Continued recruiting and hiring for multiple positions in support of the Rental and Homeowner programs including Operations and AMA
  - Continued recruiting and hiring efforts for Homeowner program including AMA Analysts and Appeals Intake Specialists
  - Continued recruiting and hiring efforts for Rental including Rental Application Advisors, Financial Advisors, File Clerks, Staff Assistants and Loan Reviewers/Underwriters

## TRAINING

- Began drafting Sold Home Training for rollout in late August
- Continued development of Appeals Fact Sheets
- Developed and delivered training for Rental Owner Occupant Team and Tier II on Owner Occupant policy and process
- Developed and delivered training on new HAPpeals software and processes

**Table 25: Training Summary**

Training Type	Training Name	Target Audience	Location	Date	Attendees
Internal	RH Information Security and Management Online Training	All Road Home Staff	Online	As of July 31, 2008	2,182
Internal	Housing Assistance Center Standard Operating Procedures Online	Homeowner Program Staff	Online	As of July 31, 2008	278
Internal	Updated Standards of Ethical Behavior	All Road Home Staff	Online	As of July 31, 2008	1,288
Internal	Assisting Applicants Who Need Additional Services Training	All Road Home Staff	Online	As of July 31, 2008	90
Internal	Owner Occupant Desk Reference Training	Rental Advisors	Goodwood Office Baton Rouge, LA	July 25, 2008	4
Internal	Appeals Training for Constituent Services	Strike Team	Goodwood Office Baton Rouge, LA	July 28, 2008	24



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Training Type	Training Name	Target Audience	Location	Date	Attendees
Internal	CDBG Training	Monitoring Team	Goodwood Office Baton Rouge, LA	July 28, 2008	3
Internal	ACG Refresher Training	Appeals Team	Jefferson Housing Assistance Center Kenner, LA	July 28, 2008	6
Internal	Case Management Training for New Hires	Grant Review New Hires	Fairfax, VA	July 28 - 29, 2008	59
Internal	Special Training on Closing Files	Post-Closing Team	Customer Assistance Center Baton Rouge, LA	July 29, 2008	20
Internal	Shortened Case Management and Insurance Verification Team	Pre-Closing New Hires	Customer Assistance Center Baton Rouge, LA	July 29, 2008	4
Internal	Owner Occupant Desk Reference Training	Rental Staff	Goodwood Office Baton Rouge, LA	July 29, 2008	4
Internal	Rental Case Management	Rental New Hires	Goodwood Office Baton Rouge, LA	July 29 - 30, 2008	3
Internal	Grant Review Training	Grant Review New Hires	Fairfax, VA	July 30 - July 31, 2008	59
Internal	HAPpeals BlueStreak Training	Rental Distribution Services Staff	Goodwood Office Baton Rouge, LA	July 31, 2008	3

## EXTERNAL AFFAIRS

### Outreach

- Provided individualized Road Home updates via a presence at the St. Bernard Community Center in St. Bernard Parish, UNO Rebuilding Information Station in Orleans Parish, Rep. Jonathan Perry's office in Vermilion Parish, and Rep. Simone Champagne's office in Iberia Parish
- Assisted First American and HGI title in locating and scheduling unreachable applicants
- Reviewed cases in Sen. Cheryl Gray's district for upcoming outreach event working to bring to resolution and toward closing
- Assisted HGI and First American Title in locating and scheduling unreachable applicants
- Coordinated statewide August 2008 outreach for state generated deadlines
- Continued to provide application assistance to Hispanic and Vietnamese communities
- Sent E-Outreach, a weekly communiqué to 1,436 legislators, staffers and community leaders informing them of program updates and details. This week's e-outreach focused on the sold home deadline and program statistics. A second e-outreach focused on the September Deadline and program statistics
- Provided program information/monitored at the Louisiana Recovery Authority Board of Directors meeting
- Initiated notification processes to legislators inviting them and their constituents to Road Home September 5<sup>th</sup> Deadline Outreach

- Worked with elected officials and staff regarding constituent issues including:
  - Sen. Cheryl Gray
  - Sen. Julie Quinn
  - Sen. Danny Martiny
  - Rep. A. B. Franklin
  - Rep. Joseph Lopinto
  - Plaquemines Parish President Billy Nungesser
  - Plaquemines Parish Councilman Burghart Turner
- Provided homeowner information, status checks and process guidance at Beacon of Hope in Orleans Parish
- Provided information, status checks, and process guidance to rental applicants at the Jefferson HAC in Jefferson Parish

**Table 26: Community Outreach Metrics**

Meeting Type	Events held 7/25-7/31	People reached 7/25-7/31	Events To Date	People Reached To Date
Community	6	70	856	44,860
Faith-Based	1	3	219	19,785
Business	-	-	32	1,402
Governmental	1	-	315	9,703
Case Managers	-	-	167	3,427
Rental	1	55	114	2,309
<b>TOTALS</b>	<b>9</b>	<b>128</b>	<b>1,703</b>	<b>81,486</b>

### Communications/Media Relations

#### In support of Homeowner program:

- Developed and disseminated messaging for the new Sold Home policy and September 5<sup>th</sup> deadline
- Developed signage and collateral materials for upcoming Outreach sessions
- Placed statewide print ad in support of Outreach sessions
- Updated Occupancy information on website
- Weekly metrics report distributed to media and posted to website

#### In support of Rental program:

- Submitted and received approval from State to post Rental Operations Status Report for July 21, 2008 on Web
- Submitted and received approval from State to post updated Final Inspection Checklist on Web
- Submitted draft of Site Index recommendation for Rental program Website update to Rental and Communications teams for review
- Completed all Rental Outreach events for July 2008
- Submitted overview plan for new format for Rental Outreach events to Rental, Communications and Outreach teams for review
- Completing final version of Site Index for Rental Website for final approval by Rental and State before design
- Completing final plans and drafts of applicant documents for Rental Outreach events that begin September 2008



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- Coordinating the on-going update, review and approval of Rental program guides, brochures and information sheets and Web content

## POLICY

- Drafted Sold Home Award Letter and Sold Home No Funding Letter
- Answered policy questions from staff
- Prepared eligibility forms and procedural clarification memorandums for review by the State

## INFORMATION TECHNOLOGY

- Finalized the Appeals requirements
- Gather requirements for the Tenant Compliance Phase II
- Tested HDS internal Beta of 8.02
- Provided SRPP a solution for the issues with BO reports

## FRAUD PREVENTION

- Continued to address investigations

**Table 27: Fraud Prevention Metrics**

ACTIVITY	Prior Totals	6/27-7/03	7/04-7/10	7/11-7/17	7/18-7/24	7/25-7/31	Current Totals
Applicant Issues Reported to Anti-Fraud	1,279	8	5	20	47	15	1,374
Evaluator Issues Reported to Anti-Fraud	5	-					5
Third-Party Issues Reported to Anti-Fraud	29	-					29

## COMPLIANCE

- Researched and responded to subpoenas, advocacy group requests, and applicant requests served on the Program
- Investigated matters reported via the Ethics and Anti-Fraud Help Lines
- Continued investigation on internal Program matters
- Reviewed and updated investigative reports on external matters

## SPECIAL NEEDS

- Continued to provide guidance to *Road Home* staff on applicants who need advice on special needs issues and or need resources for applicant referrals



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- Worked with *Road Home* applicants going to closing (homeowners, small rentals, and applicants in the Appeal process) to fulfill their requests for reasonable accommodations
- Continued ongoing discussions with RH-ADA official on accessibility factors of the HUD-Section 3 Training Program
- Continued to work with Outreach Team to coordinate homebound visits



**APPENDIX A**

**Option Selections of Applicants, by Parish of Damaged Residence**

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

PARISH	Option 1. Keep Your Home	Option 2. Sell, but Stay in Louisiana	Option 3. Sell, and Move out of Louisiana	Option 4. Decline Benefits	Option 5. Delay Selection of Benefit	Option 6. Unable to Determine Selection	Total
ACADIA	315	4		2			321
ALLEN	522	14		4	1		541
ASCENSION	160	2		2			164
ASSUMPTION	232	3		1	1		237
BEAUREGARD	1,015	18		9	3		1,045
CALCASIEU	13,531	200	12	200	105	6	14,054
CAMERON	1,648	204	5	67	34	1	1,959
EAST BATON ROUGE	198	5	1	2			206
EAST FELICIANA	27	1					28
EVANGELINE	67	1		1			69
IBERIA	1,094	29	2	5	3	4	1,137
IBERVILLE	60	3			1		64
JEFFERSON	26,483	252	57	389	609	23	27,813
JEFFERSON DAVIS	938	19	2	6	10	4	979
LAFAYETTE	123	3		1	1		128
LAFOURCHE	836	13	1	7	1	1	859
LIVINGSTON	232	7	1	2	2		244
ORLEANS	42,740	4,301	1,843	774	1,117	39	50,814



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PARISH	Option 1. Keep Your Home	Option 2. Sell, but Stay in Louisiana	Option 3. Sell, and Move out of Louisiana	Option 4. Decline Benefits	Option 5. Delay Selection of Benefit	Option 6. Unable to Determine Selection	Total
OTHER	2						2
PLAQUEMINES	3,164	362	41	72	104	9	3,752
POINTE COUPEE	15						15
SABINE	30	1					31
SAINT BERNARD	7,738	4,184	806	396	336	19	13,479
SAINT CHARLES	1,076	7	1	9	10	1	1,104
SAINT HELENA	285	2			1		288
SAINT JAMES	385			2			387
SAINT LANDRY	169	6		1		1	177
SAINT MARTIN	105	6		1			112
SAINT MARY	891	10		1	4		906
SAINT TAMMANY	11,291	224	57	142	224	11	11,949
ST JOHN THE BAPTIST	1,325	3	1	4	13	1	1,347
TANGIPAHOA	1,587	12	2	4	1	1	1,607
TERREBONNE	2,641	83	3	23	19	6	2,775
VERMILION	1,664	89	4	41	15	1	1,814
VERNON	151	3		1	2		157
WASHINGTON	1,457	21	1	8	13		1,500
WEST BATON ROUGE	14						14
WEST FELICIANA	3						3
	<b>124,214</b>	<b>10,092</b>	<b>2,840</b>	<b>2,177</b>	<b>2,630</b>	<b>128</b>	<b>142,081</b>



**APPENDIX B**

**Benefits Calculated by Damaged Residence Parish**

*Note: All Damaged Residence information is as provided by the applicant during the application process. Actual damaged residence information may differ from what the applicant provided. Eligibility information is confirmed during the verification process*

Parish	Number of Calculations
Acadia	354
Allen	657
Ascension	195
Assumption	281
Beauregard	1,177
Calcasieu	15,417
Cameron	2,112
East Baton Rouge	321
East Feliciana	38
Evangeline	88
Iberia	1,324
Iberville	93
Jefferson	33,364
Jefferson Davis	1,173
Lafayette	153
Lafourche	993
Livingston	297
Orleans	55,524
Other	2
Plaquemines	4,120
Pointe Coupee	19

Parish	Number of Calculations
Rapides	1
Sabine	34
Saint Bernard	14,650
Saint Charles	1,446
Saint Helena	324
Saint James	464
Saint Landry	216
Saint Martin	135
Saint Mary	1,072
Saint Tammany	13,460
St John the Baptist	1,748
Tangipahoa	1,799
Terrebonne	3,175
Vermilion	2,003
Vernon	178
Washington	1,790
West Baton Rouge	19
West Feliciana	6
	<b>160,222</b>



**APPENDIX C**

**Closings by Parish and Zip Code –**

***Note:** All Damaged Residence information is as provided by the applicant during the application process. Actual damaged residence information may differ from what the applicant provided. Eligibility information is confirmed during the verification process. \*Detailed closing data is based on population of 115,899 rather than 115,918 reported in Daily Governor’s Report as of July 31, 2008 due to a variance in data feeds.*

PARISH	Option 1. Keep Your Home	Option 2. Sell, but Stay in Louisiana	Option 3. Sell, and Move out of Louisiana	Total
Acadia	261	2		<b>263</b>
Allen	434	6		<b>440</b>
Ascension	129			<b>129</b>
Assumption	180			<b>180</b>
Beauregard	863	8	1	<b>872</b>
Calcasieu	11,842	90	6	<b>11,938</b>
Cameron	1,368	89	2	<b>1,459</b>
East Baton Rouge	164	3	1	<b>168</b>
East Feliciana	27			<b>27</b>
Evangeline	48			<b>48</b>
Iberia	926	14	1	<b>941</b>
Iberville	44	1		<b>45</b>
Jefferson	22,514	189	21	<b>22,724</b>
Jefferson Davis	756	6		<b>762</b>
Lafayette	103	2		<b>105</b>
Lafourche	693	6	2	<b>701</b>
Livingston	184	1		<b>185</b>



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PARISH	Option 1. Keep Your Home	Option 2. Sell, but Stay in Louisiana	Option 3. Sell, and Move out of Louisiana	Total
Orleans	37,549	2,954	1,079	<b>41,582</b>
Other	2			<b>2</b>
Plaquemines	2,397	168	10	<b>2,575</b>
Pointe Coupee	13			<b>13</b>
Sabine	25			<b>25</b>
Saint Bernard	7,081	3,031	561	<b>10,673</b>
Saint Charles	880	3	1	<b>884</b>
Saint Helena	224	1		<b>225</b>
Saint James	311			<b>311</b>
Saint Landry	144	5		<b>149</b>
Saint Martin	88	3		<b>91</b>
Saint Mary	702	3		<b>705</b>
Saint Tammany	10,048	144	26	<b>10,218</b>
St John the Baptist	1,095			<b>1,095</b>
Tangipahoa	1,336	4		<b>1,340</b>
Terrebonne	2,182	32	1	<b>2,215</b>
Vermilion	1,444	40	2	<b>1,486</b>
Vernon	121	1		<b>122</b>
Washington	1,171	14	1	<b>1,186</b>
West Baton Rouge	12			<b>12</b>
West Feliciana	3			<b>3</b>
	<b>107,364</b>	<b>6,820</b>	<b>1,715</b>	<b>115,899</b>



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### Closings by Zip Code

Zip Code	Number of Closings
A zip code was not provided	21
70001	799
70002	873
70003	2,148
70005	691
70006	1,312
70011	1
70012	1
70014	1
70017	11
70018	6
70019	4
70028	1
70029	1
70030	42
70031	41
70032	1,637
70033	1
70036	171
70037	421
70038	231
70039	76
70040	312
70041	606
70042	7
70043	4,507

Zip Code	Number of Closings
70044	3
70045	3
70046	11
70047	142
70048	1
70049	137
70050	186
70051	53
70052	37
70053	644
70054	2
70056	1,719
70057	100
70058	2,884
70059	5
70062	841
70063	6
70064	5
70065	3,427
70066	7
70067	377
70068	662
70069	9
70070	116
70071	43
70072	4,040

Zip Code	Number of Closings
70073	6
70074	1
70075	1,272
70076	12
70077	1
70078	18
70079	20
70080	15
70082	111
70083	646
70084	221
70085	1,345
70086	60
70087	284
70090	148
70091	84
70092	1,836
70093	2
70094	1,790
70095	3
70096	2
70101	13
70104	1
70105	1
70107	1
70109	1



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Zip Code	Number of Closings
70110	1
70112	68
70113	369
70114	1,153
70115	1,254
70116	665
70117	5,163
70118	2,147
70119	3,149
70120	2
70121	376
70122	7,091
70123	477
70124	3,243
70125	1,473
70126	5,586
70127	3,592
70128	3,214
70129	1,771
70130	190
70131	1,298
70132	1
70150	1
70164	1
70170	1
70174	1
70175	3
70177	7
70179	1
70183	1
70185	1
70189	1

Zip Code	Number of Closings
70217	1
70219	1
70224	1
70230	1
70301	169
70302	2
70339	5
70340	18
70341	42
70342	5
70343	26
70344	561
70345	84
70346	55
70352	1
70353	167
70354	48
70355	6
70356	139
70357	47
70358	197
70359	76
70360	117
70361	4
70363	662
70364	117
70372	9
70373	15
70374	37
70377	247
70380	75
70381	2
70390	99

Zip Code	Number of Closings
70391	4
70392	35
70393	6
70394	227
70395	28
70397	139
70401	154
70403	216
70404	13
70420	101
70421	11
70422	253
70423	1
70424	1
70426	159
70427	655
70429	4
70430	1
70431	100
70433	270
70434	9
70435	237
70436	14
70437	124
70438	326
70440	1
70441	145
70442	5
70443	159
70444	171
70445	616
70446	41
70447	73



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Zip Code	Number of Closings
70448	455
70449	15
70450	52
70451	24
70452	383
70453	8
70454	171
70455	12
70456	100
70457	1
70458	3,131
70459	11
70460	1,847
70461	2,614
70462	58
70463	14
70464	6
70465	31
70466	54
70467	3
70469	3
70470	5
70471	208
70478	1
70485	1
70501	21
70503	4
70506	12
70507	12
70508	7
70510	553
70511	3
70512	13
70514	110

Zip Code	Number of Closings
70515	11
70516	2
70517	41
70518	12
70519	3
70520	9
70521	1
70522	12
70523	19
70524	2
70525	20
70526	108
70528	281
70529	9
70531	9
70532	109
70533	608
70534	2
70535	31
70537	3
70538	396
70540	1
70542	48
70543	23
70544	184
70546	221
70548	99
70549	57
70550	2
70551	2
70552	9
70554	8
70555	12
70556	9

Zip Code	Number of Closings
70559	19
70560	632
70562	1
70563	21
70569	2
70570	91
70575	2
70576	1
70577	3
70578	55
70581	22
70582	39
70583	7
70584	5
70585	1
70586	18
70589	8
70591	145
70592	21
70601	2,797
70602	7
70605	1,575
70606	12
70607	1,881
70609	1
70610	1
70611	952
70612	5
70614	1
70615	1,153
70616	6
70621	1
70630	113
70631	535



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Zip Code	Number of Closings
70632	174
70633	438
70634	441
70637	14
70638	2
70639	2
70640	32
70641	2
70643	103
70644	2
70645	249
70646	62
70647	572
70648	151
70650	12
70651	12
70652	64
70653	56
70654	9
70655	134
70656	11
70657	213
70658	21
70659	12
70660	101
70661	224
70662	3
70663	1,223
70664	12
70665	533
70666	1
70667	1
70668	353
70669	596
70699	1

Zip Code	Number of Closings
70702	1
70706	13
70707	2
70711	16
70714	17
70716	1
70717	2
70718	3
70719	4
70721	14
70722	18
70723	36
70725	7
70726	29
70727	1
70728	1
70729	1
70730	4
70733	5
70734	6
70737	31
70739	6
70740	2
70744	14
70748	1
70749	1
70753	1
70754	8
70757	2
70760	6
70761	1
70763	15
70764	10
70767	9
70769	14

Zip Code	Number of Closings
70770	3
70772	1
70774	7
70775	7
70776	5
70777	4
70778	9
70780	1
70783	1
70785	21
70788	9
70789	2
70791	12
70792	1
70802	19
70805	27
70806	4
70807	7
70808	3
70809	1
70810	7
70811	7
70812	10
70814	15
70815	8
70816	5
70817	9
70818	1
70819	4
70820	2
70901	1
71026	1
71027	1
71028	1



# Weekly Situation & Pipeline Report

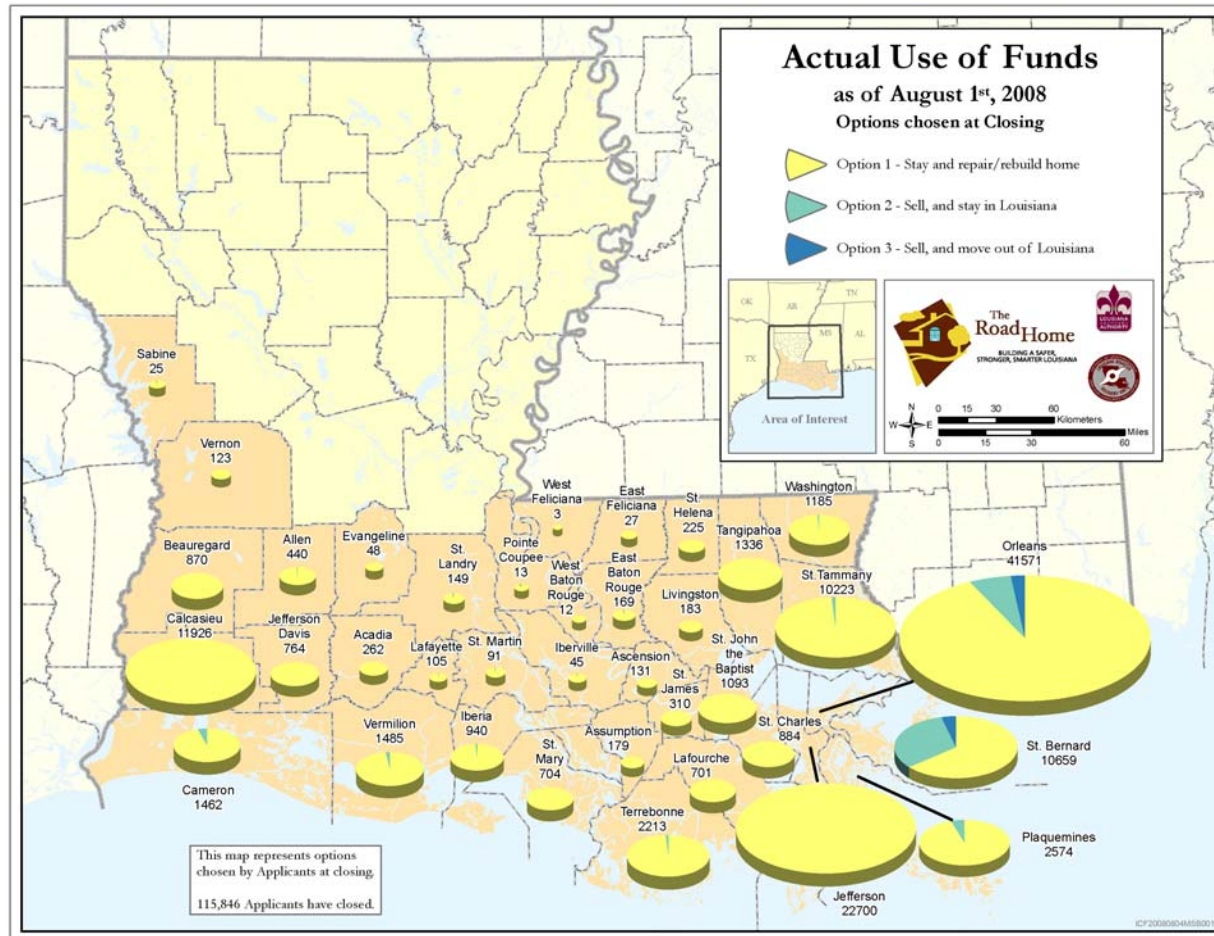
## Week 109

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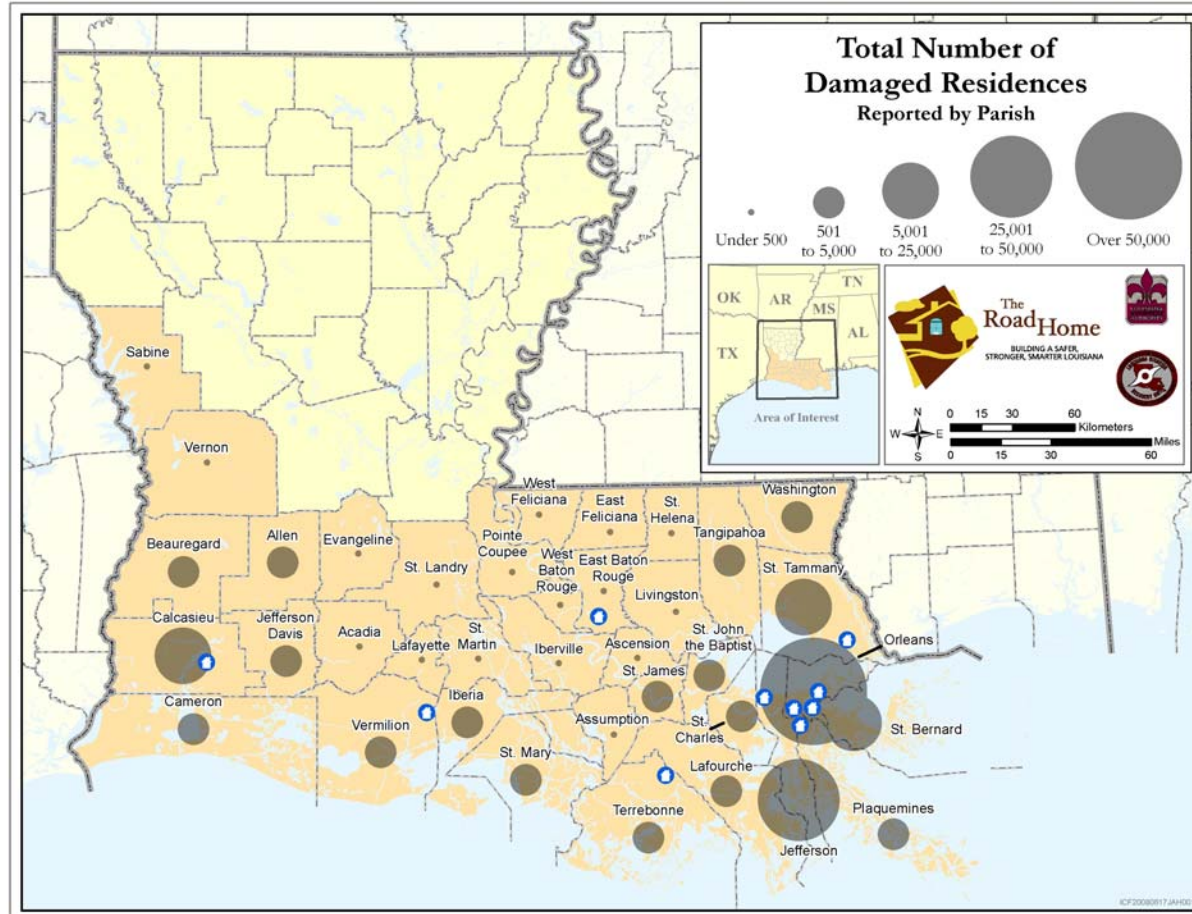
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Zip Code	Number of Closings
71119	1
71126	1
71295	1
71302	1
71322	1
71353	5
71367	11
71403	11
71419	1
71429	3
71433	1
71439	2
71446	66
71449	11
71458	1
71460	1
71461	3
71462	1
71463	64
71474	2
71486	5
71496	1
	<b>115,899</b>

### APPENDIX D



### APPENDIX E



## **GLOSSARY**

### **Table 1 Terms:**

**Applications Received** represents the cumulative number of all applications entered in the system. This number includes applications that are incomplete, test and multiple submissions.

**Applications Not Valid for Processing** represents the cumulative number of applications that are not valid. This number accounts for applications that are incomplete, test and multiple submissions.

**Applications Recorded** represents the cumulative number of applications entered in the system.

**Pre-Appointment Inactives** represents the cumulative number of applications entered that were previously Inactive and are now Ineligible for not having a completed appointment as of December 15.

**Total Appointments Held** represents the cumulative number of appointments held including Road Home Advisory Services (RHAS) appointments held.

**Initial Appointments Held** represents the cumulative number of all “first” appointments held.

**Road Home Advisory Services (RHAS) Appointments Held** represents the cumulative number of all Road Home Advisory Services appointments held.

**Benefits Calculated** represents the cumulative number of benefits calculated.

**Benefit Options Letters Sent** represents the cumulative number of benefit options letters sent to applicants.

**Total Benefit Options Letters Returned** represents the cumulative number of applicants who have selected their benefit options.

**Number of Option One Selections** represents the cumulative number of applicants who have returned their selection of benefit option one – Stay.

**Number of Option Two Selections** represents the cumulative number of applicants who have returned their selection of benefit option two – Relocate.

**Number of Option Three Selections** represents the cumulative number of applicants who have returned their selection of benefit option three – Sell.

**Decline Benefits** represents the cumulative number of applicants who have returned a letter to the program indicating they are declining all Road Home assistance.

**Delay Benefits** represents the cumulative number of applicants who have indicated that they are delaying their benefit selections.

**Incomplete Benefit Selection Form** represents the cumulative number of benefit option letters that have been returned to the program, but are incomplete or are not ready to be processed for closing. Because some applicants with open resolution cases also return their letters to the program, there is potential for overlap in this category.

**Benefit Option Letters Available for Transfer to Closing** represents the cumulative number of returned options letters that are complete and ready for final verifications required to close

**Files Transferred for Closing** represents the number of files transferred for closing to closing agents.



**Total Inactives and Ineligibles** represent the cumulative number of applicants who can not move forward in the program due to an issue that can not be resolved without action by the homeowner. This number also includes homeowners who have requested that their application not be processed at the current time. Reasons for an inactive status include:

- Homeowners who have not responded to requests for additional application information in over 90 days
- Applicants who have not returned benefit selection letters in over 90 days or have chosen to delay their option selection
- Applicants who only qualify for elevation funds
- Applicants who have mortgage or title issues that prevent them from closing

Ineligible represents the total number of applicants who do not meet the basic eligibility criteria for the program or did not complete an initial appointment by the December 15 deadline.

**Closings Scheduled** represents the daily additional number of closings scheduled and the total represents all closings currently scheduled to occur in the future. The number of closings scheduled to occur reflects the actual number of closings scheduled but not yet held.

**Closings Held** represents the cumulative number of closings that have taken place (applicants completed signing).

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

#### **APPLICATIONS & APPOINTMENTS**

**Applications Received** represents the cumulative number of all applications entered in the system. This number includes applications that are incomplete, test submissions and multiple submissions.

**Applications Recorded** represents the cumulative number of applications entered in the system.

**Pre-Appointment Inactives** represents the cumulative number of applications entered that were previously Inactive and are now Ineligible for not having a completed appointment as of December 15.

**Initial Appointments Held** represents the cumulative number of all “first” appointments held.

**Road Home Advisory Services (RHAS) Appointments Held** represents the cumulative number of all Road Home Advisory Services appointments held.

#### **CALCULATIONS**

**Benefits Calculated** represents the cumulative number of benefits calculated.

#### **OPTION SELECTION**

**Benefit Options Letters Sent** represents the cumulative number of benefit options letters sent to applicants.

**Total Benefit Options Letters Returned** represents the cumulative number of applicants who have selected their benefit options.



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**BSF Available for Transfer to Closing** represents the cumulative number of returned options letters that are complete and ready for final verifications required to close

## CLOSINGS

**Files Transferred for Closing** represents the number of files transferred for closing to closing agents.

**Inactive Closing File** represents the cumulative number of applicants who can not move forward in the program due to an issue that can not be resolved without action by the homeowner. This number also includes homeowners who have requested that their application not be processed at the current time. Reasons for an inactive status include:

- Homeowners who have not responded to requests for additional application information in over 90 days
- Applicants who have not returned benefit selection letters in over 90 days or have chosen to delay their option selection
- Applicants who only qualify for elevation funds
- Applicants who have mortgage or title issues that prevent them from closing

**Closings Held** represents the cumulative number of closings that have taken place (applicants completed signing).