



# The Road Home

BUILDING A SAFER,  
STRONGER, SMARTER LOUISIANA

## ***The Road Home*** **Week 121 Situation & Pipeline** **Report**

October 28, 2008





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### EXECUTIVE SUMMARY

#### Homeowner Assistance Program

Homeowner Program Advisors completed 265 RHAS appointments with applicants during the reporting period. The number of benefits calculated increased to 160,301 and the total number of closings held as of October 23 increased to 119,074. Cumulatively, homeowners returned 143,495 benefit options selection letters.

**Table 1: Homeowner Program Snapshot**

Activity	As of COB October 16	Weekly Activity	As of COB October 23	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	226,467	265	226,732		
<i>Initial Appointments Held</i>	166,093	-	166,093	516	7,491
<i>RHAS Appointments Held</i>	60,374	265	60,639		
Benefits Calculated	160,298	7	160,305		
Benefit Options Letters Sent	152,444	1	152,445	764	556
<b>Total Benefit Options Letters Returned</b>			<b>143,495</b>		
<i>Number of Option One Selections</i>	125,709	78	125,787	1,584	2,332
<i>Number of Option Two Selections</i>	10,165	(4)	10,161	210	109
<i>Number of Option Three Selections</i>	2,899	18	2,917	126	29
<i>Decline Benefits</i>	2,353	49	2,402	114	28
<i>Delay Benefits</i>	2,146	(35)	2,111	311	112
<i>Incomplete Benefit Selection Form</i>	117	-	117	15	24
<b>Benefit Options Letters Available for Transfer to Closing</b>			<b>134,475</b>		
Files Transferred for Closing	124,195	223	124,418	885	38
Total Inactives and Ineligibles				4,525	74,171
Closings Scheduled			124		
Closings Held	118,744	330	119,074		

### 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	14	<b>19</b>
Conditional Awards Cancelled	2,012	1,440	541	<b>3,993</b>
Conditional Awards Reinstated	49	55	3	<b>107</b>
Total Active Awards *	739	3,652	1,472	<b>5,863</b>
Commitment Letters Mailed	694	2,993	891	<b>4,578</b>
<b>OWNER OCCUPIED UNIT AWARDS</b>				
Active OO Unit Awards	142	136	33	<b>311</b>
OO Unit Award Letters Mailed	143	126	32	<b>301</b>

\* Includes 34 applications reinstated through the Appeals Process.

### Deliverables

Table 3 lists the deliverables provided during the reporting period.

**Table 3: Program Deliverables**

	Deliverables	Date
00025	The Road Home Weekly Combined Report	10/23/2008
00081-07152008	Quarterly Property Report	10/21/2008
00120-10222008	Round 1 and 2 Rental Matrix October 2008	10/22/2008
00035-10152008	Homeowner Procedures Update October 2008	10/22/2008



**HOMEOWNER PROGRAM**

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

	HOMEOWNER PROCESS	CUMULATIVE As of 10/16	CUMULATIVE As of 10/23	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	60,374	60,639	265
<b>CALCULATIONS</b>	BENEFITS CALCULATED	160,298	160,305	7
	<b>TOTAL</b>	<b>\$9.51 billion</b>	<b>\$ 9.59 billion</b>	<b>\$ .08 b</b>
	<b>AVERAGE</b>	<b>\$61,517</b>	<b>\$61,973</b>	

- 166,093 applicants have completed initial appointments

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- The \$9.59 billion total and \$61,973 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 10/16	CUMULATIVE As of 10/23	INCREASE
<b>OPTION SELECTION</b>	OPTIONS LETTERS SENT	152,444	152,445	1
	OPTIONS LETTERS RETURNED	143,389	143,495	106
	BSF AVAIL FOR TRANSFER TO CLOSING	133,504	134,475	971
<b>CLOSINGS</b>	TRANSFERRED TO CLOSING	124,195	124,418	223
	INACTIVE CLOSING FILES	907	885	(22)
	CLOSINGS HELD	118,744	119,074	330
	<b>TOTAL</b>	<b>\$7.22 billion</b>	<b>\$7.26 billion</b>	<b>\$0.04 b</b>
	<b>AVERAGE*</b>	<b>\$60,796</b>	<b>\$61,012</b>	

- Applicants have returned 143,495 Benefits Selection Forms. After processing and review, 134,475 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 265 RHAS appointments were held at the Housing Assistance Centers for the reporting week.
  - 60,639 total RHAS appointments held to date
  - 259 RHAS appointments were due to walk-ins

### Award Calculation Activity

- The *Road Home* has calculated 160,305 benefits, an increase of 7 for the week
  - The average total benefit calculated was \$61,973 (excluding 'zero' awards)
  - 5,588 calculations resulted in 'zero' grant amounts
  - 154,717 'non-zero' or 'positive' grant amounts were calculated

### Award Selection Activity

- A total of 143,495 homeowners have returned a benefits options letter (Table 1)
- Of the homeowners who have selected their options:
  - 31,928 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
  - 134,475 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>	26,550
<i>Number of Option Two</i>	3,163
<i>Number of Option Three</i>	2,215
<b>Total Elderly Benefits Options Selected</b>	<b>31,928</b>

### Low/Moderate Income Households

- A total of 119,056 applicants had gone to closing and received their Road Home disbursement as of October 23, 2008. Of these applicants, 49,824 (42 percent) were documented as LMI.
- A total of \$7,263,896,075.28 in Homeowner Assistance Program awards were disbursed as of October 23, 2008. Of these disbursements, \$3,648,037,633.24 (50 percent) went to applicants documented as LMI.



# Weekly Situation & Pipeline Report

## Week 121

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**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	125,787	10,161	2,917	138,865
Total \$ in Options Selected	\$7,100,285,485.38	\$798,705,915.07	\$191,486,491.44	\$8,090,477,891.89
Comp Grant \$ in Options Selected	\$4,872,562,460.49	\$600,340,387.88	\$191,486,491.44	\$5,664,389,339.81
Elev Grant \$ in Options Selected *	\$922,521,960.63			\$922,521,960.63
ACG \$ in Options Selected	\$1,305,201,064.26	\$198,365,527.19		\$1,503,566,591.45
<b>Low/Moderate Income (LMI) Detail</b>				
Number of Options Selected by LMI	52,353	4,480	1,199	58,032
Total \$ to LMI	\$3,694,661,633.65	\$433,812,822.23	\$78,612,080.12	\$4,207,086,536.00
Comp Grant \$ to LMI	\$1,950,843,735.70	\$235,447,295.04	\$78,612,080.12	\$2,264,903,110.86
Elev Grant \$ to LMI	\$438,616,833.69			\$438,616,833.69
ACG \$ to LMI	\$1,305,201,064.26	\$198,365,527.19		\$1,503,566,591.45
<b>Percentage of Total</b>				
% of Total Options Selected that are LMI	42 %	44 %	41 %	42 %
% of Total \$ to LMI	52 %	54 %	41 %	52 %
% of Comp Grant \$ to LMI	40 %	39 %	41 %	40 %
% of Elev Grant \$ to LMI	48 %	N/A%	N/A	48 %
% of ACG \$ to LMI	100 %	100 %	N/A	100 %



# Weekly Situation & Pipeline Report

## Week 121

October 17 – October 23, 2008

**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	109,938	7,251	1,867	119,056
Total \$ in Closings Held	\$6,489,477,156.74	\$632,846,187.57	\$141,572,730.97	\$7,263,896,075.28
Comp Grant \$ in Closings Held	\$4,707,546,127.45	\$473,795,943.12	\$141,516,030.97	\$5,322,858,101.54
Elev Grant \$ in Closings Held	\$449,310,706.24	\$29,295.00		\$449,340,001.24
ACG \$ in Closings Held	\$1,332,681,549.35	\$159,020,949.45		\$1,491,702,498.80
<b>Number of Closings Held by LMI</b>				
Number of Closings Held by LMI	45,722	3,328	774	49,824
Total \$ to LMI	\$3,256,878,938.36	\$332,512,327.33	\$58,646,367.55	\$3,648,037,633.24
Comp Grant \$ to LMI	\$1,853,353,985.57	\$187,513,412.92	\$58,646,367.55	\$2,099,513,766.04
Elev Grant \$ to LMI	\$209,617,729.33			\$209,617,729.33
ACG \$ in Research for Categorization*	\$138,713,099.59	\$14,022,035.04		\$152,735,134.63
ACG \$ to LMI	\$1,193,968,449.76	\$144,998,914.41		\$1,338,967,364.17
Total ACG \$	\$1,332,681,549.35	\$159,020,949.45		\$1,491,702,498.80
<b>% of Total Closings Held that are LMI</b>				
% of Total Closings Held that are LMI	42 %	46 %	41 %	42 %
<b>% of Total \$ to LMI</b>				
% of Total \$ to LMI	50 %	53 %	41 %	50 %
<b>% of Comp Grant \$ to LMI</b>				
% of Comp Grant \$ to LMI	39 %	40 %	41 %	39 %
<b>% of Elev Grant \$ to LMI</b>				
% of Elev Grant \$ to LMI	47 %	N/A%	N/A	47 %
<b>% of ACG \$ to LMI</b>				
% of ACG \$ to LMI	90 %	91 %	N/A	90 %

\*These funds represent disbursed ACG dollars that have not been categorized through final grant review.

### Elevation Program Activity

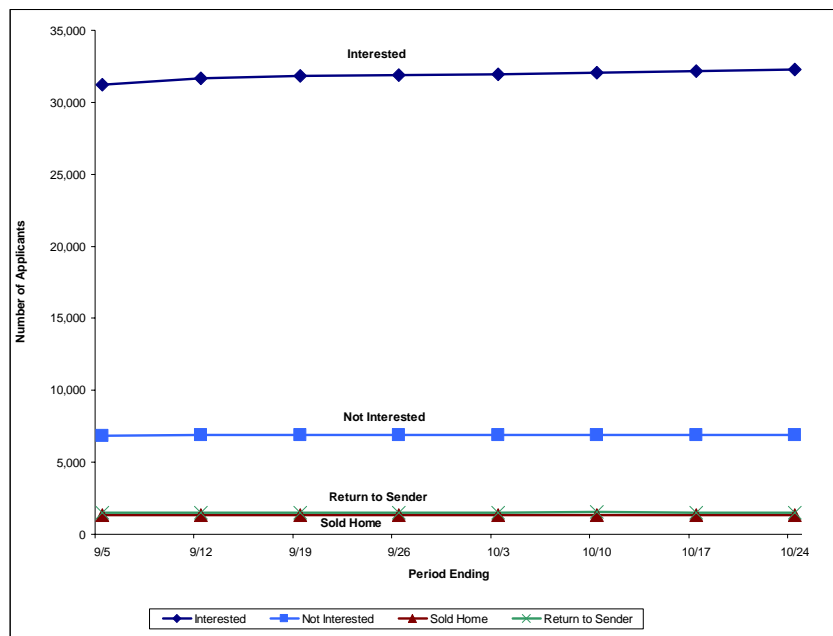
As of October 23, 115,669 Elevation letters have been sent to applicants.

- 32,297 (28%) applicants have returned letters expressing their interest in participating in the elevation program. See Figure 3 for a summary of Elevation Letter Response Activity
- 13,199 applicants have received elevation disbursements totaling \$375,110,998 (average elevation award of \$28,420) including:
  - 2,173 initial and 9,127 additional disbursements of elevation funds in 2008 for a total of \$328,588,393
  - 1,899 initial and 204 additional disbursements previously distributed for a total of \$46,522,605
- 3,158 elevation requests for a total of \$91,935,645 are currently at the closing companies for processing. See Table 7 and Figure 4 for summary of Elevation Disbursement Activity

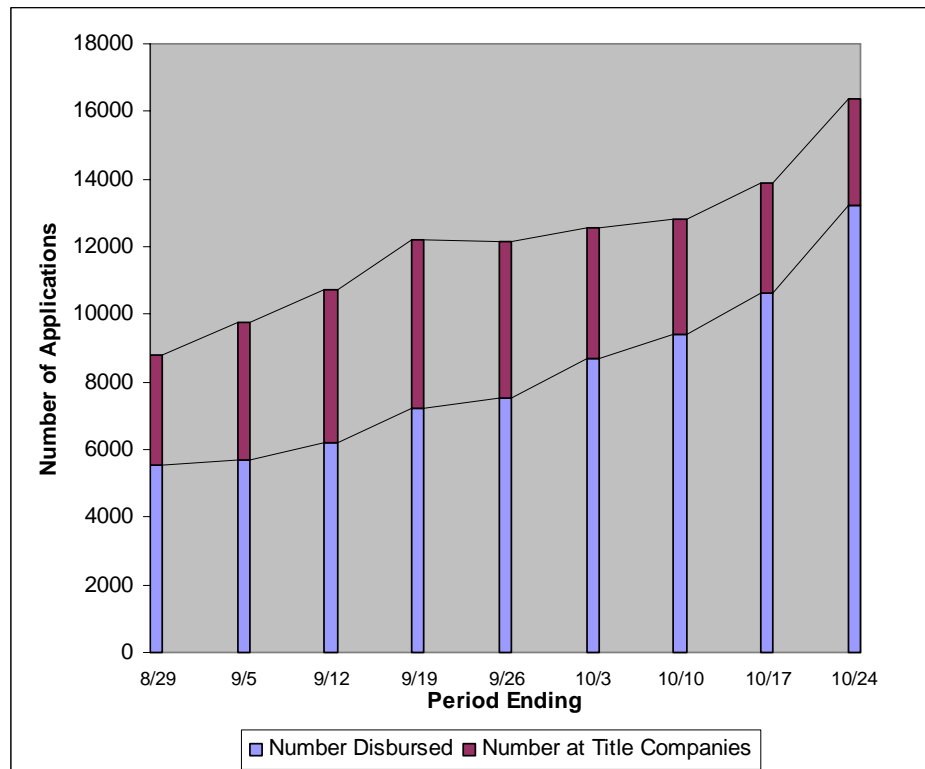
**Table 7: Elevation Disbursement Activity**

	# of Initial Disbursements	# of Additional Disbursements	Total \$ Disbursed
Previous Elevation Disbursements	1,899	204	\$46,522,605
2008 Elevation Disbursements	2,173	9,127	\$328,588,393
<b>Total Elevation Disbursements</b>	<b>4,072</b>	<b>9,331</b>	<b>\$375,110,998</b>
Applications at Title Companies			
First American Pending Transactions		1,582	\$45,757,001.61
HGI Pending Transactions		1,576	\$46,178,643.15
<b>Total Pending Transactions</b>		<b>3,158</b>	<b>\$91,935,644.76</b>

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



**Figure 4: 2008 Elevation Disbursement Activity**



### Closing Activity

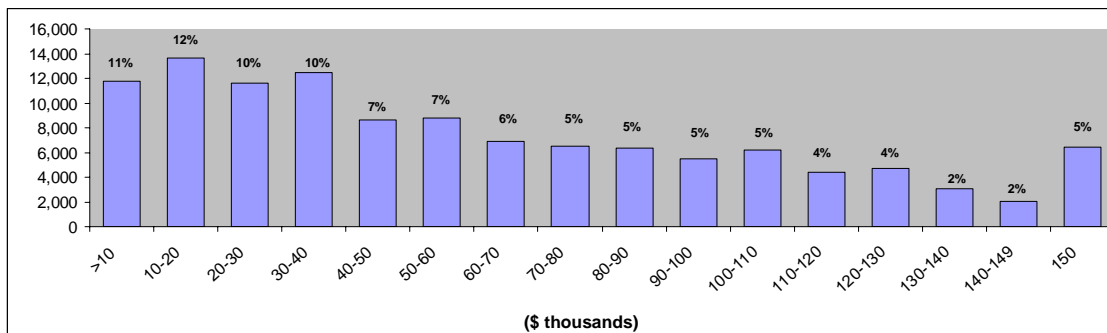
- As of October 23, 2008, a total of 124,418 files were transferred to closing agents with 223 files transferred during the reporting week. Currently, 885 of the files transferred are in inactive status due to situations concerning mortgage or title issues.
- The closing team assisted closing agents with the completion of 119,074 closings
- Of the total 119,074 cumulative closings:
  - The average award is \$61,012
  - 49,824 also received additional compensation grants. The average additional compensation grant award is \$26,874
  - Closed 27,112 elderly applicants for a total of \$1,939,810,306
  - Appendix C reports Closings by Parish and Zip Code
- To date, the closing agents have completed 13,759 additional disbursements for a total of \$423,049,708
  - The average additional disbursement is \$30,747

**Table 8: Eligible Application Summary**

Completed Applications	
Closed	119,139
Scheduled to be Closed this Month	310
Zero Awards	14,484
Declined Awards	2,597
<b>Total Completed Applications</b>	<b>136,530</b>
Applications that Cannot Close	
No Option Selected by Homeowner	1,140
Occupancy Proof Required	853
Refuse to Close	398
Title, Succession, Legal, Mortgage Issues	1,565
Ownership Proof Required	2,561
Homeowner Unreachable	594
POA/ADDH Issues	974
FA/HGI Undecided	28
Compliance Reviews	351
Homeowner Planning to Appeal	186
CREDCO Fail	118
Sold Homes Being Validated for Eligibility	89
Missing Homeowner Documentation	631
<b>Total Applications that Cannot Close</b>	<b>9,488</b>
Active Applications	
In Progress – Pre-Closings (non-sold homes)	997
In Progress – Sold Homes “Interested” and Valid	1,509
IN Progress – Title Company	370
Awaiting Approval by OCD	108
Filed Pre-Closing Appeal	799
<b>Total Active Applications</b>	<b>3,783</b>
<b>TOTAL ELIGIBLE APPLICATIONS</b>	<b>149,801</b>

\*Detailed closing data is based on population of 119,139, rather than 119,074 reported in the Daily Governor’s Report as of October 23, 2008, due to a variance in data feeds.

**Figure 5: Award Size**



**Table 9: Pre-Closing Tracking Report**

ACTIVITY	Fri 10/17	Sat 10/18	Sun 10/19	Mon 10/20	Tues 10/21	Wed 10/22	Thurs 10/23	Weekly Total
Files Transferred for Closing	121	-	-	22	33	-	47	223

**Table 10: Applicants and Closings Held By Race/Ethnicity**

Race	Applicants		Closings Held	
	#	%	#	%
American Indian/Alaska Native	666	>1%	482	>1%
American Indian/Alaska Native and White	530	>1%	350	>1%
American Indian/Alaskan Native/Black-African American	379	>1%	274	>1%
Asian	2,925	2%	2,010	2%
Asian and White	300	>1%	198	>1%
Black/African American	65,837	36%	49,424	42%
Black/African American and White	1,153	1%	850	1%
Native Hawaiian/Other Pacific Islander	183	>1%	126	>1%
Other Multi-Racial	3,419	2%	2,395	2%
White	72,046	39%	46,832	39%
A race was not provided	37,668	20%	16,115	14%
	185,106		119,056	

\*Detailed closing data is based on population of 119,056, rather than 119,074 reported in the Daily Governor's Report as of October 23, 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 11.

**Table 11: Condominium Pipeline Progress**

Activity	Prior Total	9/12- 9/18	9/19- 9/25	9/26- 10/2	10/3- 10/9	10/10- 10/16	10/17- 10/23	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	1,098	-	-	-	-	-	-	1,098
Total Evaluations Completed	1,024	-	-	-	-	-	-	1,024
Total Option Calculations Completed	859	-	-	-	-	-	-	859
Option Letters Created	828	4	-	6	-	-	-	838
Option Letters Mailed*	828	4	-	-	-	-	-	832
Option Letters Received	532	-	-	-	-	-	-	532
Transmitted for Closing	313	-	-	-	-	-	-	313
Closings Held	277	-	-	-	-	-	-	277
Elevation Only Awards	186	-	-	-	-	-	-	186
Inactive Applications	211	-	-	-	-	-	-	211
Ineligible Applications	148	-	-	-	-	-	-	148

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

### Manufactured Home Project

The special manufactured home project has yielded the following progress (See Summary Table 12):

- Identified 16,293 manufactured home applicants to date
- Updating and 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 14,429 loaded PSVs (*BPOs, N.A.D.A, Road Home Appraisals, and Applicant-provided Appraisals*) meet MH policy
- Letter generation underway

**Table 12: Manufactured Home Pipeline Progress**

Activity	Prior Total	9/19-9/25	9/26-10/2	10/3-10/9	10/10-10/16	10/17-10/23	Cumulative Total
Total number of Manufactured Home Applications	16,284	2	1	-	1	5	<b>16,293</b>
Total Manufactured Home Evaluations verified	16,029	105	(104)	1	2	-	<b>16,033</b>
Total Pre-Storm values verified	14,375	10	12	12	13	7	<b>14,429</b>
Total Applications released into letter generation process	14,375	10	12	12	13	7	<b>14,429</b>

### Home Evaluations (Home Inspection) Activity

- Addressed 325 Grant review issues.
- Addressed 63 Appeals.
- Addressed 90 CAD disputes.
- Addressed 5 State Appeals.
- Addressed 7 Critical issues.
- Addressed 15 FEMA eligibility appeals.
- Addressed 26 Structure type issues.
- Completed 29 Elevation Grants
- Addressed 35 Elevation appeals
- Reviewed 15 Post-Accepted Edit Cases and identified 1 for additional review

**Table 13: Home Evaluation Team Metrics**

ACTIVITY	Prior Total	9/19-9/25	9/26-10/2	10/3-10/9	10/10-10/16	10/17-10/23	Current Total	Five Week Average
Work Orders Submitted by Housing Advisors	166,016	1	4	3	0	2	166,026 <sup>a</sup>	2
Work Orders Dispatched	162,929	3	3	5	2	2	162,944	3
Evaluations Completed in the Field	161,036	22	(14)	15	17	11	161,087 <sup>b</sup>	10

<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.

### Appeals

As of October 23, 2008, 14,148 cases have been processed through the Appeals department, 12,023 have been resolved, and 2,125 are active. Table 14 shows the status of these cases.

**Table 14: Status of Appeals**

ACTIVITY	As of COB 9/25	As of COB 10/2	As of COB 10/9	As of COB 10/16	As of COB 10/23
Total Cases Processed in Appeals	12,987	13,406	13,503	13,999	14,148
Appeal Cases Pending Decision/Research	1,940	2,237	2,125	2,103	2,012
Ineligible Status Appeal	164	143	140	115	113
<b>Total Active Cases</b>	<b>2,104</b>	<b>2,380</b>	<b>2,265</b>	<b>2,218</b>	<b>2,125</b>
<b>Total Cases Resolved</b>	<b>10,883</b>	<b>11,026</b>	<b>11,238</b>	<b>11,781</b>	<b>12,023</b>

Further analysis of the resolved appeals cases (12,023) shows that:

- 4,191 (35%) have resulted in additional funds being awarded to applicants for a total of \$107,312,500.27. The average additional disbursement is \$25,605
- 441 (4%) resulted in a reduction of award for a total of \$6,266,729.41. The average reduction is \$14,210
- 3,597 (30%) resulted in no change to the award amount
- 3,794 (32%) were reviewed for an eligibility determination, 1,403 were approved and 2,391 were denied

**Table 15: Status of State Panel Review Appeals**

ACTIVITY	As of COB 10/9	As of COB 10/16	As of COB 10/23
Total Cases Requested for State Panel Review	1,659	1,746	1,746
State Appeal Cases in Progress	932	1,005	1,005
State Appeal Cases Resolved	727	741	741

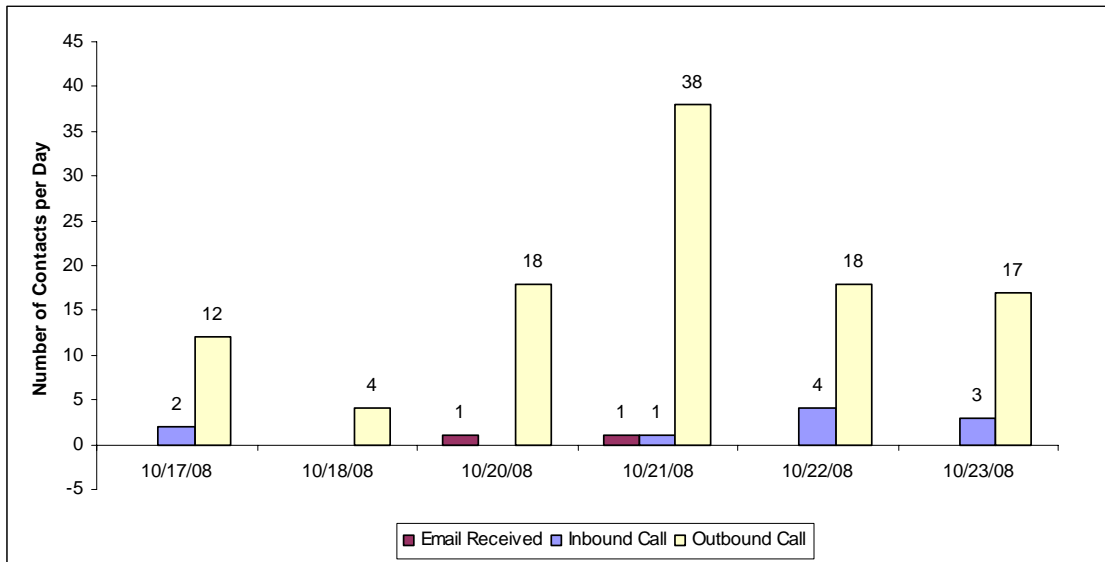
### Personal Application Liaisons (PAL)

During the reporting week, 119 contacts were made through the PAL initiative. Table 16 and Figure 6 detail these contacts by type and day.

**Table 16: PAL Metrics**

ACTIVITY	Prior Total	9/19-9/25	9/26-10/2	10/3-10/9	10/10-10/16	10/17-10/23	Current Total
<b>Email Received</b>	3,305	199	183	5	15	2	<b>3,709</b>
<b>Inbound Calls</b>	17,322	109	109	15	21	10	<b>17,586</b>
<b>Outbound Calls</b>	60,157	153	289	87	102	107	<b>60,895</b>
<b>Total Contacts</b>	<b>80,784</b>	<b>461</b>	<b>581</b>	<b>107</b>	<b>138</b>	<b>119</b>	<b>82,190</b>

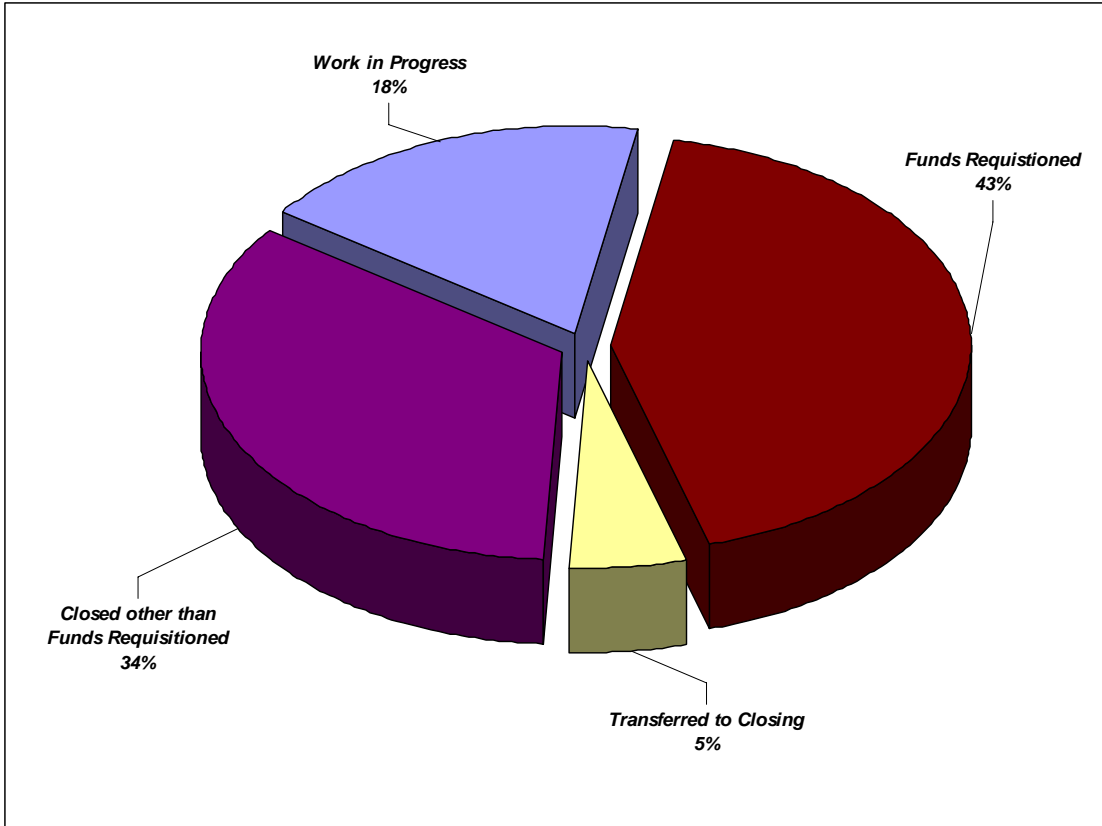
**Figure 6: PAL Contacts by Day**



As of October 23, a total of 37,470 applicant files have moved forward through the PAL initiative. Figure 7 shows the PAL application breakdown.

- A total of 6,657 applicant files are being worked by PAL staff
- A total of 30,813 applicant files have progressed to the closing process as the result of PAL efforts
  - 2,015 have been transmitted to closing
  - 15,988 have closed and are at a status of Funds Requisitioned
  - 12,810 have closed and are at a status of other than Funds Requisitioned

**Figure 7: PAL Application Breakdown**





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Additionally, Table 17 shows a breakdown of issues by categories that are being handled through the PAL initiative.

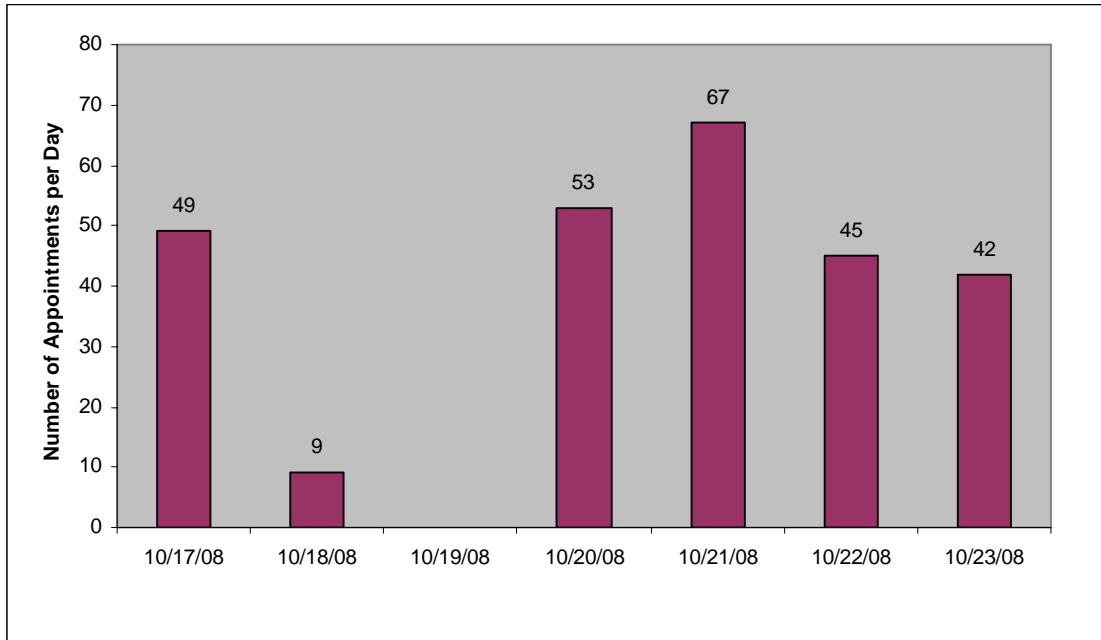
**Table 17: PAL Issues by Category**

Issue Category	# Apps
Advisory Services	4
Affordable Compensation Loan	43
APPEALS	135
Applicant Info	120
Application Completion	32
Appraisal	87
BPO	11
CREDCO	65
Delay of Benefit	58
ECD	82
EGrant Calculation	31
Elevation	62
FEMA	26
FEMA Ind Assist	3
Flood Ins (NFIP)	3
Geospatial	1
Grant Recovery	1
Grant Review	7
Home Evaluation	95
Homeowner dispute or decision pending	238
Info Request	30
Insurance	148
Legal Costs	4
Manufactured Home	4
Missing Documentation	616
Multiple Issues	131
Option Change	24
Option Letter	44
Other	339
Outlier	27
Owner Occupancy	155
Ownership	413
Parish Damage	1
Policy Appeal	19
Pre-Storm Value	63
Program eligibility pending	69
Pullback from Title Company	1
QA Outliers	1
Request Appraisal	2
Status Change	324
Title	588
Zero Benefit	51
<b>Total</b>	<b>4,158</b>

### Housing Assistance Center Appointment Activity

There were a total of 265 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 18: Housing Assistance Center Appointments by Week**

ACTIVITY	Prior Total	9/19-9/25	9/26-10/2	10/3-10/9	10/10-10/16	10/17-10/23	Current Total	Five Week Average
RHAS Appointments Held	59,441	215	213	242	263	265	60,639	240
Average Daily RHAS Appointments Held		36	36	40	44	44		

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 259 walk-ins for RHAS appointments during this reporting period.

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

Housing Assistance Center Processing, October 17 - October 23, 2008  
RHAS Appointments

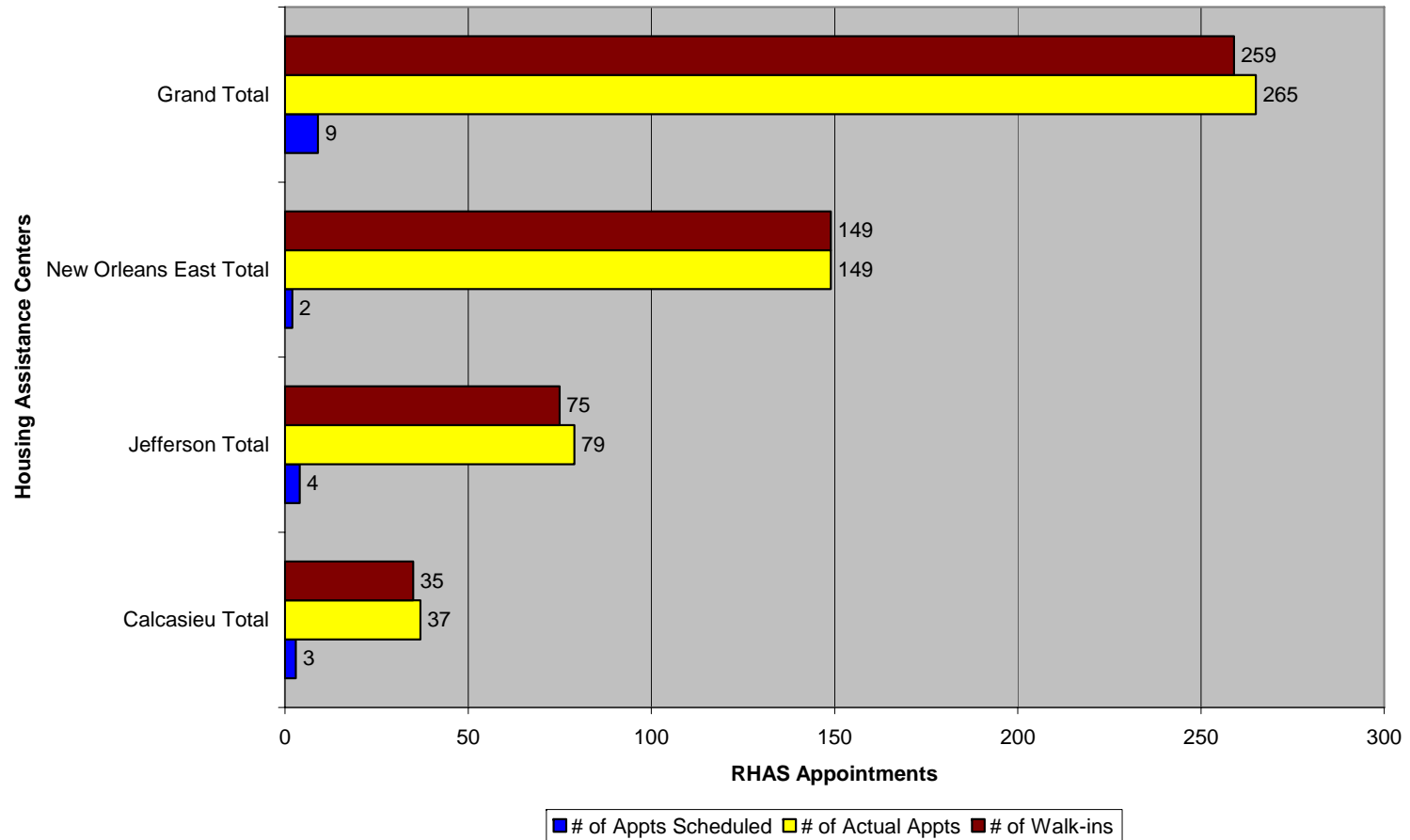
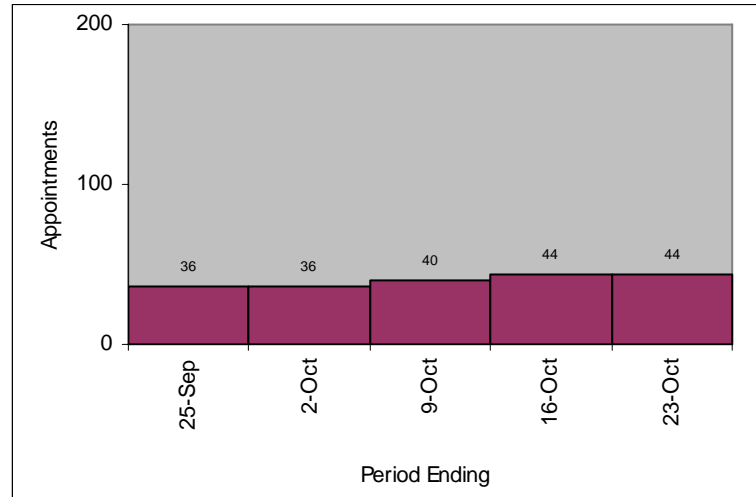


Figure 10 shows the average number of RHAS appointments per day over the current and previous periods.

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





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### RENTAL PROPERTY PROGRAM

#### Underwriting

- Continued to process all active awardees (See Table 19)

**Table 19: 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		14	
<b>VERIFICATION STAGE</b>						
Active Awards	739		3,652		1,472	
<b>COMMITMENT LETTER STAGE</b>						
Commitment Letters Mailed	694		2,993		891	
Commitment Letters Returned by Applicant		489		1,714		345
<b>POST COMMITMENT STAGE</b>						
0 - 24% Construction Complete		125		588		73
25 - 49% Construction Complete		59		160		50
50 - 74% Construction Complete		39		135		16
75 - 100% Construction Complete		266		831		206
Total	489		1,714		345	

#### Appeals

- 11 new appeals received
- Researched and resolved 4 requests for Constituent Services
- Mailed 8 Determination letters

**Table 20: Status of Appeals**

Appeals	Round 1	Round 2	Round 2 Waitlist (Round 2.1)	Program Total
Level II Issues Received	329	511	603	<b>1,443</b>
Level II Issue Determinations Made	312	486	571	<b>1,369</b>
Level II Issues Remaining to be Resolved	17	25	32	<b>74</b>

**Table 21: Appeals Determinations Summary**

Appeals Determination After Road Home Review	Cumulative Total
Approved	260
Denied	1,012
Dismissed	86
Withdrawn	11

### Owner Occupant (OO) Units

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

**Table 22: 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	136	33	311
OO Unit Award Letters Mailed	0	8	0	8
No Acceptance Required	142	128	33	303
Award Cancelled Post Mailing	143	126	32	301
OO Unit Award Acceptance Received	20	20	1	41
Outstanding OO Unit Award Acceptances	5	9	3	17
OO Unit Award Cancelled Post Acceptance	118	97	28	243
OO Unit Award Closings Held	105	73	12	190

### Tier 2 Call Center

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

**Table 23: Tier 2 Call Center Metrics**

Inbound Calls	
Round 1	13
Round 2	30
Round 2 Waitlist (Round 2.1)	49
Other	96
<b>Total Inbound Calls</b>	<b>188</b>

### Financial Advisors

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

**Table 24: Financial Advisor Appointment Activity**

Financial Advisor	Appointments	Cumulative Total
Contacts Made *		3,847
Appointments Not Required		2,544
Appointments Required		1,303
Appointments Completed		967
Appointments to be Completed		336

\*Includes applicants contacted multiple times

### URA

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

**Table 25: Relocation Activity**

Occupied Properties				
	Round 1	Round 2	Round 2 Waitlist (Round 2.1)	Program Total
<b>Owner Occupants with Tenants</b>				
Total Rental Units	169	82	6	257
Tenant Occupied (Relocation possibly needed)	108	49	6	163
Vacant Units	61	33	0	94
<b>General Pool with Tenants</b>				
Total Rental Units	53	422	167	642
Tenant Occupied (Relocation possibly needed)	43	321	133	497
Vacant Units	10	101	34	145

## PROGRAM SUPPORT STATUS

### LOGISTICS

- Property
  - Delivered 2008, 2<sup>nd</sup> Quarter, Property Audit to the State
- Facilities
  - Staff phase movement from New Orleans East to Jefferson in final phases
  - Discussing plans with Louisiana Property Assistance Agency (LPAA) for the closure of the New Orleans East facility.

### HUMAN RESOURCES

- Attended the first-ever “*Workforce Summit*,” organized by the Louisiana Workforce Commission and held in Lafayette, and established contacts with private and public agencies, listed below, to identify new and/or expanded career opportunities for individuals exiting The Road Home Program.
  - Greater New Orleans Inc./Regional Economic Alliance
  - Work Investment board/City of Lafayette
  - Work Investment Board/Region I of Louisiana
- At the request of the Director of Job 1 of New Orleans, created two new HUD Section 3 Training Workshops focusing on “*Job Readiness in an Urban Environment*,” designed for low-income persons, veterans, people with disabilities, and individuals recently unemployed by Hurricanes Gustav and Ike.
- Continued with researching and drafting “*Restrospective on Career Transition Programs*,” launched by the HR Team to assist employees exiting The Road Home because of downsizing.
- At the request of Job 1 of Algiers, a new series of HUD Section 3 Training Workshops will be prepared for low- and very-low income clients to improve their pre-employment potential and workplace performance, emphasizing critical soft skills.

### TRAINING

- Updated Finance Invoice System Manual to reflect functionality
- Updated Homeowner Grant Review Course
- Revised Homeowner Case Management slides
- Preparing for Homeowner Case Management
- Developed exercises for Homeowner Grant Review Course
- Posted Homeowner Program training materials to the portal
- Created a hard copy of the Rental Pre-Commitment Binder Training for Rental Staff
- Produced extra training materials for Rental Staff
- Guided production of a template for CDBG Monitoring Field Reviews
- Updated Rental Case Management Course

**Table 26: 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 October 23, 2008	2, 243
Internal	Housing Assistance Center Standard Operating Procedures Online Training	Homeowner Program Staff	Online	As of October 23, 2008	280
Internal	Updated Standards of Ethical Behavior	All Road Home Staff	Online	As of October 23, 2008	1, 348
Internal	Contracts Training	Compliance Monitoring Staff	Goodwood Office Baton Rouge, LA	October 23, 2008	1

## EXTERNAL AFFAIRS

### Outreach

- Provided individualized Road Home updates via a presence at the St. Bernard Community Center in St. Bernard Parish, and Lower 9<sup>th</sup> Ward in Orleans Parish.
- Assisted with Appeals State review clarification calls.
- Attempted to contact previously unreachable applicants to move them forward. During this reporting timeframe reached 159 applicants with 358 contacts pending.
- Provided program information/individualized status checks for applicants at the Joint Legislative Budget Committee meeting.
- Worked with elected officials and staff regarding constituent issues including:
  - Sen. A. G. Crowe
  - Sen. Reggie Dupre
  - Rep. Simone Champagne
  - Rep. Jonathan Perry
  - Rep. J. P. Morrell
  - Rep. Joseph LoPinto, III
  - Rep. Kevin Pearson
  - Rep. Walker Hines
  - Rep. Cedric Richmond
  - New Orleans Councilman James Carter
  - Plaquemines Parish Councilman Burghart Turner
  - Ernie Broussard, Executive Director of Planning, Cameron Parish

**Table 27: Community Outreach Metrics**

Meeting Type	Events held 10/17-10/23	People reached 10/17-10/23	Events To Date	People Reached To Date
Community	3	56	887	50,824
Faith-Based	*	*	219	19,785
Business	*	*	32	1,402
Governmental	1	*	323	9,772
Case Managers	*	*	167	3,427
Rental	*	*	114	2,309
<b>TOTALS</b>	<b>4</b>	<b>56</b>	<b>1,742</b>	<b>87,519</b>

### Communications/Media Relations

#### In support of Homeowner program:

- Assisted with the formatting of the Closeout Business Plan.
- Developed and distributed Elevation Appeals letters.
- Distributed the HUD Section 3 employment training workshop media advisory.
- Weekly metrics report distributed to media and posted to website.

#### In support of Rental program:

- Completing review timeline, Rental Home page, Rental Property Owners section (including Owner Occupants and Non-Profits) and new photo selection for the Web redesign.
- Coordinating the on-going update, review and approval of Rental program guides, brochures, information sheets and Web content.

### POLICY

- Answered policy questions from staff
- Delivered revised HO program policies version 6.1 with requested revisions

### INFORMATION TECHNOLOGY

- Provided support of eGrants end users and Operations Management through issue resolution/task completion (approximately 202 completed or resolved) via ithomeownersupport inbox.
- Completed HDS 8.1 testing – ready to rollout
- Issued PVCS change management report to OCD
- Updated Pre-Closing Unauthorized Inventory Rank Report
- Provided data clarification around applicant option selection and closing by block to OCD
- Updating WIMBY critical infrastructure
- Provided Second Disbursement Analysis to OCD



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## **FRAUD PREVENTION AND COMPLIANCE**

- Researched and responded to subpoenas, advocacy group requests, and applicant requests served on the Program
- Investigated both internal and external matters reported via several sources, to include the Ethics and Anti-Fraud Help Lines

**Table 28: Fraud Prevention Metrics**

<b>ACTIVITY</b>	<b>Prior Totals</b>	<b>9/19-9/25</b>	<b>9/26-10/2</b>	<b>10/3-10/9</b>	<b>10/10-10/16</b>	<b>10/17-10/23</b>	<b>Current Totals</b>
<b>Applicant Issues Reported to Anti-Fraud</b>	1,542	23	25	24	24	21	<b>1,659</b>
<b>Evaluator Issues Reported to Anti-Fraud</b>	5	-	-	-	-	-	<b>5</b>
<b>Third-Party Issues Reported to Anti-Fraud</b>	30	-	-	-	-	-	<b>30</b>



**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	318	4		2			324
Allen	528	15	1	3	1		548
Ascension	161	2		2			165
Assumption	235	2		1	1		239
Beauregard	1,024	18		9	4		1,055
Calcasieu	13,618	198	14	212	86	4	14,132
Cameron	1,663	207	5	66	30	1	1,972
East Baton Rouge	201	6	1	2			210
East Feliciana	27	1					28
Evangeline	69	1		1			71
Iberia	1,102	28	2	7	3	3	1,145
Iberville	60	3			1		64
Jefferson	26,861	256	60	431	487	22	28,117
Jefferson Davis	949	18	2	5	12	4	990
Lafayette	124	3		1	1		129
Lafourche	848	11	1	8	1	1	870
Livingston	234	6	1	2	2		245



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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
Orleans	43,354	4,321	1,897	862	863	35	51,332
Plaquemines	3,228	357	46	84	89	7	3,811
Pointe Coupee	15						15
Sabine	33						33
Saint Bernard	7,824	4,242	815	444	286	19	13,630
Saint Charles	1,094	6	1	10	6	1	1,118
Saint Helena	286	2			1		289
Saint James	390			2			392
Saint Landry	170	6		1		1	178
Saint Martin	107	5		1			113
Saint Mary	906	8		1	2		917
Saint Tammany	11,416	224	60	159	189	9	12,057
St John The Baptist	1,342	2	1	7	11	1	1,364
Tangipahoa	1,603	13	2	4	1	1	1,624
Terrebonne	2,670	81	3	24	11	6	2,795
Vermilion	1,682	92	4	43	10	2	1,833
Vernon	154	3		1	2		160
Washington	1,474	20	1	7	11		1,513
West Baton Rouge	14						14
West Feliciana	3						3
	<b>125,787</b>	<b>10,161</b>	<b>2,917</b>	<b>2,402</b>	<b>2,111</b>	<b>117</b>	<b>143,495</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	660
Ascension	195
Assumption	281
Beauregard	1,178
Calcasieu	15,421
Cameron	2,115
East Baton Rouge	321
East Feliciana	38
Evangeline	88
Iberia	1,323
Iberville	92
Jefferson	33,382
Jefferson Davis	1,173
Lafayette	153
Lafourche	995
Livingston	296
Orleans	55,549
Plaquemines	4,125
Pointe Coupee	19

Parish	Number of Calculations
Rapides	1
Sabine	34
Saint Bernard	14,662
Saint Charles	1,446
Saint Helena	327
Saint James	464
Saint Landry	216
Saint Martin	135
Saint Mary	1,072
Saint Tammany	13,465
St John The Baptist	1,748
Tangipahoa	1,802
Terrebonne	3,177
Vermilion	2,004
Vernon	178
Washington	1,791
West Baton Rouge	19
West Feliciana	6
	<b>160,305</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 119,056 rather than 119,074 reported in Daily Governor’s Report as of October 23, 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	274	2		276
Allen	445	8		453
Ascension	130			130
Assumption	189			189
Beauregard	880	9	1	890
Calcasieu	12,089	98	7	12,194
Cameron	1,401	97	2	1,500
East Baton Rouge	167	3	1	171
East Feliciana	27			27
Evangeline	48			48
Iberia	948	14	1	963
Iberville	47	1		48
Jefferson	23,047	189	23	23,259
Jefferson Davis	779	8		787
Lafayette	105	2		107
Lafourche	721	6	1	728
Livingston	192	2		194



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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	38,362	3,167	1,190	42,719
Plaquemines	2,527	190	13	2,730
Pointe Coupee	13			13
Sabine	25			25
Saint Bernard	7,221	3,191	595	11,007
Saint Charles	900	3	1	904
Saint Helena	236	1		237
Saint James	331			331
Saint Landry	149	5		154
Saint Martin	92	3		95
Saint Mary	750	3		753
Saint Tammany	10,244	147	26	10,417
St John The Baptist	1,118			1,118
Tangipahoa	1,391	4	1	1,396
Terrebonne	2,266	36	1	2,303
Vermilion	1,477	44	3	1,524
Vernon	128	2		130
Washington	1,204	16	1	1,221
West Baton Rouge	12			12
West Feliciana	3			3
	<b>109,938</b>	<b>7,251</b>	<b>1,867</b>	<b>119,056</b>



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Zip Code	Number of Closings
Zip code not provided	21
70001	810
70002	898
70003	2,202
70005	711
70006	1,337
70011	1
70012	1
70014	1
70017	11
70018	6
70019	4
70028	1
70029	1
70030	42
70031	41
70032	1,700
70033	1
70036	176
70037	435
70038	240
70039	78
70040	321
70041	654
70042	6
70043	4,655
70044	3
70045	3
70046	11
70047	146

Zip Code	Number of Closings
70048	1
70049	141
70050	195
70051	53
70052	40
70053	663
70054	1
70056	1,750
70057	105
70058	2,959
70059	5
70062	860
70063	6
70064	5
70065	3,507
70066	7
70067	394
70068	678
70069	9
70070	121
70071	44
70072	4,105
70073	6
70074	1
70075	1,316
70076	13
70077	1
70078	18
70079	20
70080	15

Zip Code	Number of Closings
70081	1
70082	120
70083	694
70084	225
70085	1,393
70086	62
70087	288
70090	161
70091	91
70092	1,877
70093	2
70094	1,848
70095	2
70096	1
70101	15
70104	1
70105	1
70107	1
70109	1
70110	1
70112	67
70113	384
70114	1,194
70115	1,283
70116	690
70117	5,350
70118	2,195
70119	3,221
70120	1
70121	385



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Zip Code	Number of Closings
70122	7,280
70123	489
70124	3,356
70125	1,508
70126	5,736
70127	3,676
70128	3,282
70129	1,809
70130	197
70131	1,331
70132	1
70150	1
70164	1
70170	1
70174	1
70175	2
70177	7
70179	1
70183	1
70185	1
70189	1
70217	1
70219	1
70224	1
70230	1
70301	173
70302	2
70339	5
70340	19
70341	46

Zip Code	Number of Closings
70342	5
70343	27
70344	571
70345	90
70346	55
70352	1
70353	172
70354	49
70355	7
70356	147
70357	49
70358	204
70359	76
70360	125
70361	5
70363	694
70364	120
70372	10
70373	15
70374	37
70377	261
70380	78
70381	2
70390	102
70391	4
70392	37
70393	6
70394	239
70395	28
70397	146

Zip Code	Number of Closings
70401	157
70403	224
70404	13
70420	103
70421	11
70422	271
70423	1
70424	1
70426	164
70427	679
70429	4
70430	1
70431	102
70433	274
70434	9
70435	244
70436	16
70437	133
70438	333
70440	1
70441	154
70442	5
70443	162
70444	176
70445	634
70446	42
70447	74
70448	468
70449	16
70450	52



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Zip Code	Number of Closings
70451	27
70452	391
70453	8
70454	181
70455	12
70456	101
70457	1
70458	3,181
70459	10
70460	1,886
70461	2,652
70462	62
70463	14
70464	6
70465	32
70466	55
70467	3
70469	3
70470	5
70471	213
70478	1
70485	1
70501	24
70503	4
70506	12
70507	12
70508	7
70510	569
70511	2
70512	13

Zip Code	Number of Closings
70514	122
70515	10
70516	2
70517	43
70518	12
70519	3
70520	9
70521	1
70522	13
70523	20
70524	2
70525	21
70526	113
70528	289
70529	9
70531	11
70532	111
70533	621
70534	3
70535	32
70537	3
70538	423
70540	1
70542	51
70543	24
70544	192
70546	225
70548	102
70549	59
70550	2

Zip Code	Number of Closings
70551	2
70552	9
70554	8
70555	12
70556	11
70559	20
70560	641
70562	1
70563	26
70569	2
70570	94
70575	2
70576	1
70577	3
70578	58
70581	22
70582	40
70583	7
70584	5
70585	1
70586	18
70589	8
70591	150
70592	22
70601	2,845
70602	7
70605	1,605
70606	11
70607	1,924
70609	1



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Zip Code	Number of Closings
70610	1
70611	966
70612	5
70614	1
70615	1,171
70616	6
70621	1
70630	117
70631	556
70632	176
70633	457
70634	448
70637	14
70638	2
70639	3
70640	34
70641	2
70643	106
70644	2
70645	257
70646	64
70647	584
70648	156
70650	13
70651	12
70652	68
70653	56
70654	9
70655	136
70656	11

Zip Code	Number of Closings
70657	219
70658	22
70659	13
70660	103
70661	228
70662	3
70663	1,258
70664	14
70665	550
70667	1
70668	363
70669	612
70699	1
70702	1
70706	13
70707	2
70711	17
70714	17
70716	1
70717	2
70718	3
70719	4
70721	14
70722	18
70723	37
70725	7
70726	30
70727	1
70728	1
70729	1

Zip Code	Number of Closings
70730	4
70733	5
70734	6
70737	31
70739	7
70740	2
70744	14
70748	1
70749	1
70750	1
70753	1
70754	8
70757	2
70760	6
70761	1
70763	17
70764	11
70767	9
70769	15
70770	3
70772	1
70774	7
70775	7
70776	5
70777	4
70778	9
70780	4
70783	1
70785	21
70788	9



# Weekly Situation & Pipeline Report

## Week 121

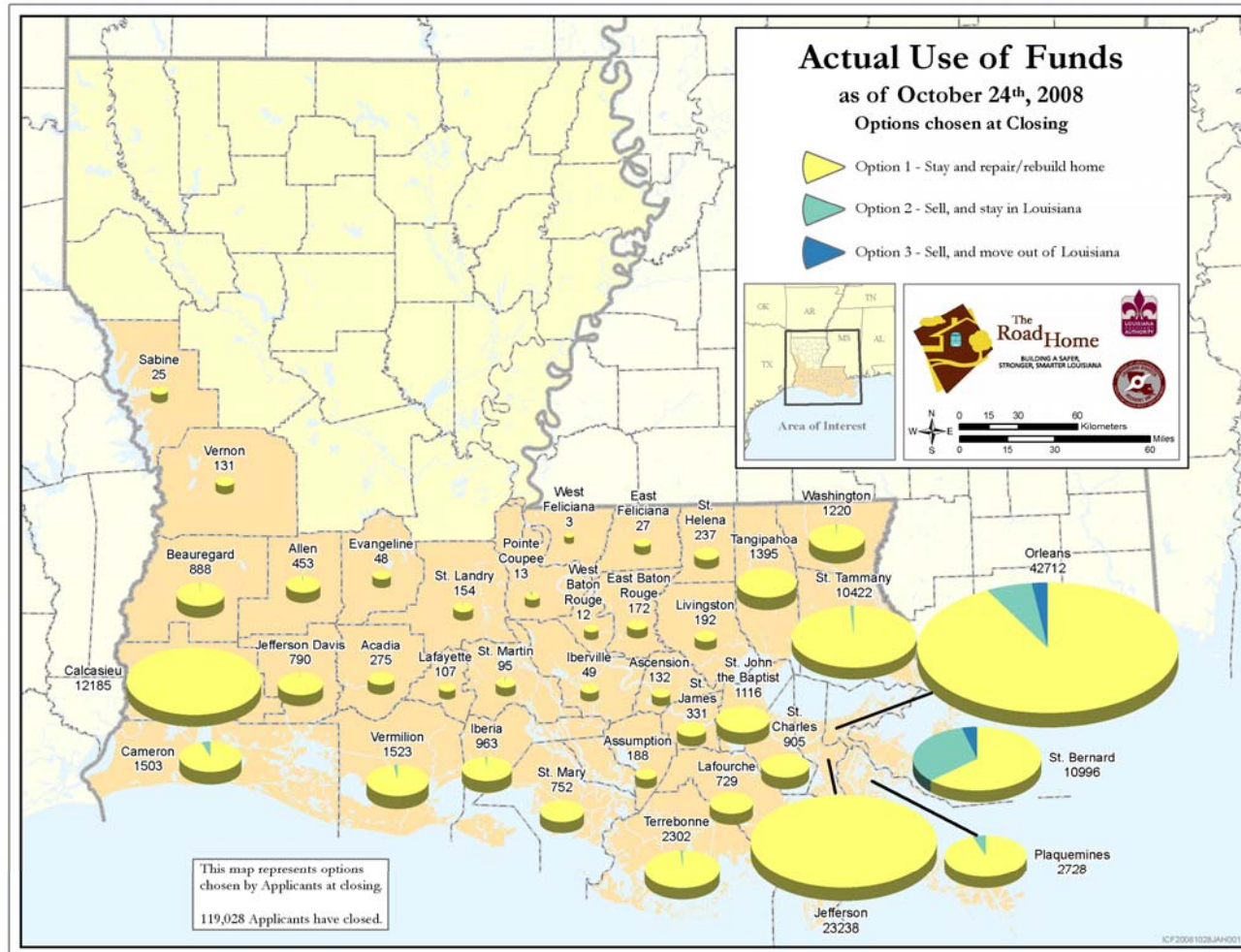
October 17– October 23, 2008

Zip Code	Number of Closings
70789	2
70791	12
70792	1
70802	19
70805	27
70806	4
70807	7
70808	3
70809	1
70810	7
70811	7
70812	11
70814	16
70815	8
70816	5
70817	9
70818	1
70819	4
70820	2
70901	1
71026	1
71027	1
71028	1
71119	1
71126	1
71295	1
71302	1
71322	1
71353	5
71367	11

Zip Code	Number of Closings
71403	12
71419	1
71429	3
71433	1
71439	2
71446	71
71449	11
71458	1
71460	1
71461	3
71462	1
71463	66
71474	2
71486	5
71496	1
	<b>119,056</b>



### 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.



# Weekly Situation & Pipeline Report

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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).