



# The Road Home

BUILDING A SAFER,  
STRONGER, SMARTER LOUISIANA

## ***The Road Home*** **Week 133 Situation & Pipeline** **Report**

January 20, 2009





**Table of Contents**

EXECUTIVE SUMMARY ..... 2

    Homeowner Assistance Program..... 2

    Small Rental Property Program ..... 3

    Deliverables ..... 3

HOMEOWNER PROGRAM ..... 4

    Housing Assistance Center Activity ..... 6

    Award Calculation Activity ..... 6

    Award Selection Activity..... 6

    Low/Moderate Income Households ..... 6

    Elevation Program Activity ..... 9

    Closing Activity ..... 10

    Condominium Project ..... 12

    Manufactured Home Project ..... 13

    Home Evaluations (Home Inspection) Activity..... 13

    Appeals ..... 14

    Personal Application Liaisons (PAL) ..... 15

    Housing Assistance Center Appointment Activity ..... 18

RENTAL PROPERTY PROGRAM..... 20

    Underwriting..... 20

    Appeals ..... 20

    Owner Occupant (OO) Units ..... 21

    URA ..... 21

    Tier 2 Call Center..... 22

    Financial Advisors ..... 22

PROGRAM SUPPORT STATUS ..... 23

    HUMAN RESOURCES ..... 23

    LOGISTICS ..... 23

    POLICY ..... 23

    INFORMATION TECHNOLOGY ..... 23

    TRAINING ..... 24

    EXTERNAL AFFAIRS ..... 24

        Communications/Media Relations..... 24

        Outreach..... 25

    FRAUD PREVENTION AND COMPLIANCE ..... 26

APPENDIX A ..... 27

APPENDIX B ..... 29

APPENDIX C ..... 30

APPENDIX D ..... 37

APPENDIX E ..... 38

GLOSSARY ..... 39

### EXECUTIVE SUMMARY

#### Homeowner Assistance Program

Homeowner Program Advisors completed 149 RHAS appointments with applicants during the reporting period. The number of benefits calculated increased to 160,445 and the total number of closings held as of January 15 increased to 121,461. Cumulatively, homeowners returned 143,814 benefit options selection letters.

**Table 1: Homeowner Program Snapshot**

Activity	As of COB January 8	Weekly Activity	As of COB January 15	Status Adjustments	
				Inactive	Ineligible
Applications Received	229,416		229,416		
Applications Not Valid for Processing			44,303	-	44,303
Applications Recorded	185,113		185,113		
Pre-Appointment Inactives			19,151	-	19,151
Total Appointments Held	228,652	149	228,801		
<i>Initial Appointments Held</i>	166,094		166,094	162	9,449
<i>RHAS Appointments Held</i>	62,558	149	62,707		
Benefits Calculated	160,439	6	160,445		
Benefit Options Letters Sent	152,675	8	152,683	167	882
<b>Total Benefit Options Letters Returned</b>			<b>143,927</b>		
<i>Number of Option One Selections</i>	126,206	28	126,234	610	2,578
<i>Number of Option Two Selections</i>	10,178	(20)	10,158	43	388
<i>Number of Option Three Selections</i>	2,908	1	2,909	12	71
<i>Decline Benefits</i>	2,563	5	2,568	5	62
<i>Delay Benefits</i>	1,933	(5)	1,928	89	259
<i>Incomplete Benefit Selection Form</i>	-	-	-	5	41
<b>Benefit Options Letters Available for Transfer to Closing</b>			<b>135,616</b>		
Files Transferred for Closing	126,776	160	126,936	28	136
Total Inactives and Ineligibles				1,121	77,320
Closings Scheduled			140		
Closings Held	121,195	266	121,461		

### 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	198	<b>203</b>
Conditional Awards Cancelled	2,024	1,495	609	<b>4,128</b>
Conditional Awards Reinstated	51	58	4	<b>113</b>
Total Active Awards *	729	3,600	1,589	<b>5,918</b>
Commitment Letters Mailed	689	3,115	1,094	<b>4,898</b>
<b>OWNER OCCUPIED UNIT AWARDS</b>				
Active OO Unit Awards	145	135	35	<b>315</b>
OO Unit Award Letters Mailed	144	124	32	<b>300</b>

\* Includes 48 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	1/13/2009
00123-11132009	Conflict of Interest Report	1/13/2009

### HOMEOWNER PROGRAM

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

	HOMEOWNER PROCESS	CUMULATIVE As of 1/8	CUMULATIVE As of 1/15	INCREASE
<b>APPLICATIONS &amp; APPOINTMENTS</b>	APPS RECEIVED	229,416	229,416	-
	APPS RECORDED	185,113	185,113	-
	PRE-APPT INACTIVE APPS	19,151	19,151	-
	INITIAL APPTS HELD	166,094	166,094	-
	RHAS APPTS HELD	62,558	62,707	149
<b>CALCULATIONS</b>	BENEFITS CALCULATED	160,439	160,445	6
	<b>TOTAL</b>	<b>\$9.66 billion</b>	<b>\$ 9.67 billion</b>	<b>\$ .01 b</b>
	<b>AVERAGE</b>	<b>\$62,381</b>	<b>\$62,436</b>	

- 166,094 applicants have completed initial appointments

- The \$9.67 billion total and \$62,436 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 1/8	CUMULATIVE As of 1/15	INCREASE
<b>OPTION SELECTION</b>	OPTIONS LETTERS SENT		152,675	152,683	8
	OPTIONS LETTERS RETURNED		143,788	143,814	26
	BSF AVAIL FOR TRANSFER TO CLOSING		135,503	135,616	113
<b>CLOSINGS</b>	TRANSFERRED TO CLOSING		126,776	126,936	160
	INACTIVE CLOSING FILES		34	28	(6)
	CLOSINGS HELD		121,195	121,461	266
	<b>TOTAL</b>		<b>\$7.63 billion</b>	<b>\$7.66 billion</b>	<b>\$.03 b</b>
	<b>AVERAGE*</b>		<b>\$62,968</b>	<b>\$63,087</b>	

- Applicants have returned 143,814 Benefits Selection Forms. After processing and review, 135,616 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 149 RHAS appointments were held at the Housing Assistance Centers for the reporting week.
  - 62,707 total RHAS appointments held to date
  - Of the RHAS appointments for this reporting period, all were walk-ins

### Award Calculation Activity

- The *Road Home* has calculated 160,445 benefits, an increase of 6 for the week
  - The average total benefit calculated was \$62,436 (excluding 'zero' awards)
  - 5,585 calculations resulted in 'zero' grant amounts
  - 154,860 'non-zero' or 'positive' grant amounts were calculated

### Award Selection Activity

- A total of 143,814 homeowners have returned a benefits options letter (Table 1)
- Of the homeowners who have selected their options:
  - 32,004 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
  - 135,616 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>	26,622
<i>Number of Option Two</i>	3,161
<i>Number of Option Three</i>	2,221
<b>Total Elderly Benefits Options Selected</b>	<b>32,004</b>

### Low/Moderate Income Households

- A total of 121,499 applicants had gone to closing and received their Road Home disbursement as of January 15, 2009. Of these applicants, 51,165 (42 percent) were documented as LMI.
- A total of \$7,661,835,608 in Homeowner Assistance Program awards were disbursed as of January 15, 2009. Of these disbursements, \$3,886,670,731 (51 percent) went to applicants documented as LMI.



# Weekly Situation & Pipeline Report

## Week 133

January 9, 2009 – January 15, 2009

**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	126,234	10,175	2,909	139,318
Total \$ in Options Selected	\$7,199,291,619.02	\$803,758,460.06	\$191,692,805.38	\$8,194,742,884.46
Comp Grant \$ in Options Selected	\$4,895,413,062.59	\$603,029,984.24	\$191,692,805.38	\$5,690,135,852.21
Elev Grant \$ in Options Selected	\$968,871,705.55	N/A	N/A	\$968,871,705.55
ACG \$ in Options Selected	\$1,335,033,055.87	\$200,728,475.82	N/A	\$1,535,761,531.69
Number of Options Selected by LMI	52,687	4,535	1,184	58,406
Total \$ to LMI	\$3,765,075,454.59	\$439,182,542.03	\$78,240,840.35	\$4,282,498,836.97
Comp Grant \$ to LMI	\$1,963,535,778.97	\$238,454,066.21	\$78,240,840.35	\$2,280,230,685.53
Elev Grant \$ to LMI	\$466,506,619.75	N/A	N/A	\$466,506,619.75
ACG \$ to LMI	\$1,335,033,055.87	\$200,728,475.82	N/A	\$1,535,761,531.69
% of Total Options Selected that are LMI	42%	45%	41%	42%
% of Total \$ to LMI	52%	55%	41%	52%
% of Comp Grant \$ to LMI	40%	40%	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 133

January 9, 2009 – January 15, 2009

**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	112,005	7,458	1,986	121,449
Total \$ in Closings Held	\$6,852,046,409.11	\$657,729,831.38	\$152,059,367.84	\$7,661,835,608.33
Comp Grant \$ in Closings Held	\$4,777,953,144.74	\$490,318,129.89	\$152,059,367.84	\$5,420,330,642.47
Elev Grant \$ in Closings Held	\$711,370,952.49	\$49,755.00	N/A	\$711,420,707.49
ACG \$ in Closings Held	\$1,362,722,311.88	\$167,361,946.49	N/A	\$1,530,084,258.37
Number of Closings Held by LMI	46,855	3,484	826	51,165
Total \$ to LMI	\$3,474,133,120.54	\$349,516,338.10	\$63,021,271.97	\$3,886,670,730.61
Comp Grant \$ to LMI	\$1,890,297,412.41	\$194,914,692.32	\$63,021,271.97	\$2,148,233,376.70
Elev Grant \$ to LMI	\$340,649,317.06	\$20,460.00	N/A	\$340,669,777.06
ACG \$ in Research for Categorization**	\$119,535,920.81	\$12,780,760.71	N/A	\$132,216,681.52
ACG \$ to LMI	\$1,243,186,391.07	\$154,581,185.78	N/A	\$1,397,767,576.85
Total ACG \$	\$1,362,722,311.88	\$167,361,946.49	N/A	\$1,530,084,258.37
% of Total Closings Held that are LMI	42 %	47 %	42 %	42 %
% of Total \$ to LMI	51 %	53 %	41 %	51 %
% of Comp Grant \$ to LMI	40 %	40 %	41 %	40 %
% of Elev Grant \$ to LMI	48 %	41 %	N/A	48 %
% of ACG \$ to LMI	91 %	92 %	N/A	91 %

\*Detailed closing data is based on population of 121,449 rather than 121,461 reported in the Daily Governor's Report as of January 15, 2009, due to a variance in data feeds.

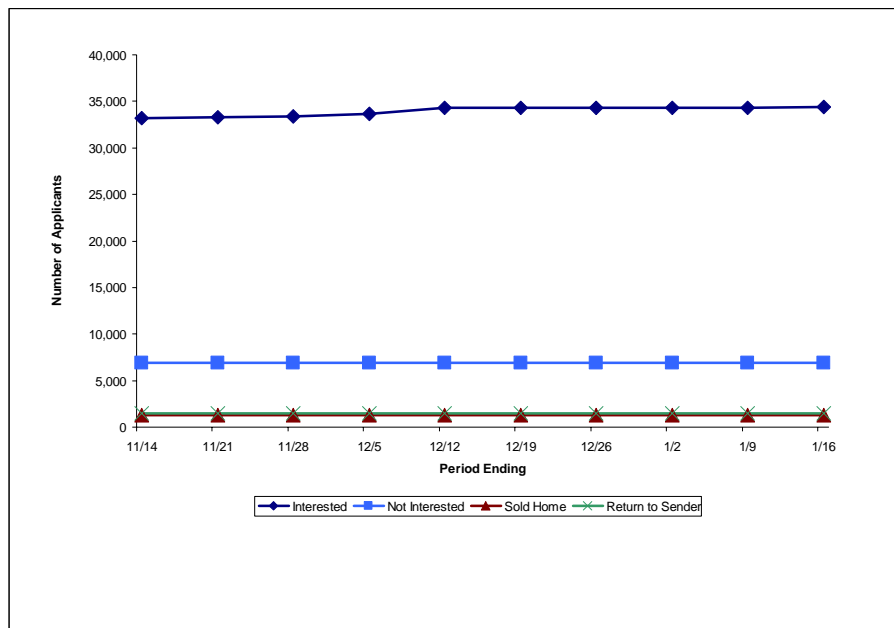
\*\*These funds represent disbursed ACG dollars that have not been categorized through final grant review.

### Elevation Program Activity

As of January 15, 2009, 116,115 elevation letters have been sent to applicants.

- 34,404 (30%) applicants have returned letters expressing their interest in participating in the elevation program. See Figure 3 for a summary of Elevation Letter Response Activity
- 21,307 applicants have received elevation disbursements totaling \$613,844,909 (average elevation award of \$28,810) including:
  - 3,308 initial and 16,092 additional disbursements of elevation funds in 2008 for a total of \$565,018,525
  - 1,907 initial and 399 additional disbursements previously distributed for a total of \$48,826,384
- 3,196 elevation requests for a total of \$91,755,205 are currently at the closing companies for processing. See Table 7 and Figure 4 for a summary of Elevation Disbursement Activity.

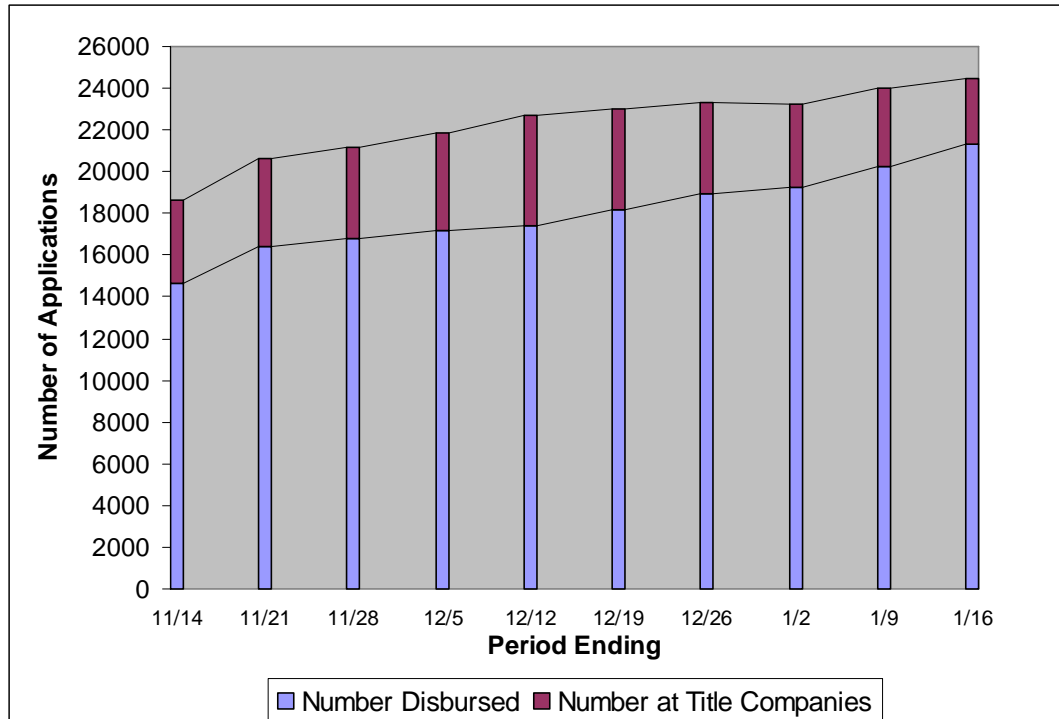
**Figure 3: 2008 Elevation Letter Response Activity**



**Table 7: Elevation Disbursement Activity**

	# of Initial Disbursements	# of Additional Disbursements	Total \$ Disbursed
Previous Elevation Disbursements	1,907	399	\$48,826,384
2008 Elevation Disbursements	3,308	15,116	\$565,018,525
<b>Total Elevation Disbursements</b>	<b>5,143</b>	<b>16,092</b>	<b>\$613,844,909</b>
<b>Applications at Title Companies</b>			
First American Pending Transactions		2,056	\$58,244,393.91
HGI Pending Transactions		1,140	\$33,510,811.09
<b>Total Pending Transactions</b>		<b>3,196</b>	<b>\$91,755,205.00</b>

**Figure 4: 2008 Elevation Disbursement Activity**



### Closing Activity

- As of January 15, 2009, a total of 126,936 files have been transferred to closing agents with 160 files transferred during the reporting week. Currently, 28 of the files transferred are in inactive status due to situations concerning mortgage or title issues.
- The closing team has assisted closing agents complete 121,461 closings, of which:
  - The average award is \$63,087.
  - 51,165 also received additional compensation grants. The average additional compensation grant award is \$27,319.
  - Closed 27,670 elderly applicants for a total of \$2,028,694,499.
  - Appendix C reports Closings by Parish and Zip Code.
- To date, the closing agents have completed 25,873 additional disbursements for a total of \$714,270,668. The average additional disbursement is \$27,607.



# Weekly Situation & Pipeline Report

## Week 133

January 9, 2009 – January 15, 2009

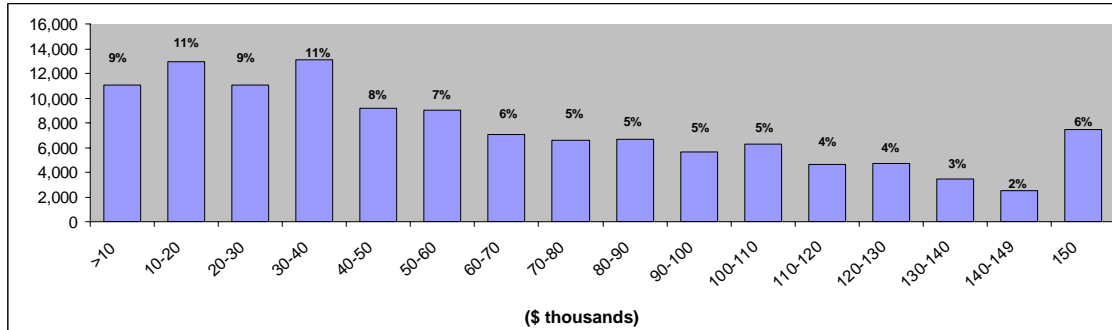
**Table 8: Eligible Application Summary**

<b>Completed Applications</b>	
Closed	121,461
Scheduled to be Closed this Month	267
Zero Awards	14,455
Communique's Exhausted	568
Program Policy Actions Completed	2,705
Declined/Withdrawn Awards	3,252
<b>Total Completed Applications</b>	<b>142,708</b>
<b>Applications that Cannot Close</b>	
No Option Selected by Homeowner	147
Occupancy Proof Required	138
Refuse to Close	105
Title, Succession, Legal, Mortgage Issues	508
Ownership Proof Required	1,046
Homeowner Unreachable	61
POA/ADDH Issues	655
FA/HGI Undecided	28
Compliance Reviews	237
Homeowner Planning to Appeal	219
CREDCO Fail	19
Homeowner Needs to Provide HUD 1/Act of Sale	1,247
FEMA Eligibility Issue	30
Missing Homeowner Documentation	223
<b>Total Applications that Cannot Close</b>	<b>4,663</b>
<b>Active Applications</b>	
In Progress – Pre-Closings (non-sold homes)	1,131
In Progress – Sold Homes "Interested" and Valid	355
IN Progress – Title Company	957
Awaiting Approval by OCD	189
Filed Pre-Closing Appeal	291
<b>Total Active Applications</b>	<b>2,923</b>
<b>TOTAL ELIGIBLE APPLICATIONS</b>	<b>150,294</b>

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

<b>ACTIVITY</b>	<b>Fri 1/9</b>	<b>Sat 1/10</b>	<b>Sun 1/11</b>	<b>Mon 1/12</b>	<b>Tues 1/13</b>	<b>Wed 1/14</b>	<b>Thurs 1/15</b>	<b>Weekly Total</b>
<b>Files Transferred for Closing</b>	-	-	-	85	-	75	-	<b>160</b>

**Figure 5: Award Size**



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

Race	Applicants		Closings Held	
	#	%	#	%
American Indian/Alaska Native	666	>1%	488	>1%
American Indian/Alaska Native and White	530	>1%	358	>1%
American Indian/Alaskan Native/Black-African American	379	>1%	286	>1%
Asian	2,925	2%	2,048	2%
Asian and White	300	>1%	200	>1%
Black/African American	65,833	36%	50,395	41%
Black/African American and White	1,153	1%	869	1%
Native Hawaiian/Other Pacific Islander	183	>1%	127	>1%
Other Multi-Racial	3,419	2%	2,432	2%
White	72,052	39%	47,816	39%
A race was not provided	37,673	20%	16,430	14%
<b>Total</b>	<b>185,113</b>		<b>121,449</b>	

\*Detailed closing data is based on population of 121,449 rather than 121,461 reported in the Daily Governor's Report as of January 15, 2009, 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	12/12-12/18	12/19-12/25	12/26-1/1	1/2-1/8	1/9-1/15	Weekly Total
Total number of Condo Applications	1,024	1,024	1,024	1,024	1,024	-
Option Letters Created Status	3	12	2	10	3	(7)
Option Selected Status	20	30	41	42	44	2
Condos in Progress	130	88	80	67	60	(7)
Transmitted for Closing	31	47	60	59	69	10
Closings Held	286	287	288	294	299	5
Total Zero Award	258	265	266	266	283	17
Total Inactive Applications	58	53	49	49	27	(22)
Total Ineligible Applications	235	240	236	235	237	2



# Weekly Situation & Pipeline Report

## Week 133

January 9, 2009 – January 15, 2009

### Manufactured Home Project

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

- Identified 16,316 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, we have determined whether or not the existing BPO is based on manufactured home comparables; if not ordered new BPO
  - Confirmed 14,603 loaded PSVs (*BPOs, N.A.D.A, Road Home Appraisals, and Applicant-Provided Appraisals*) meet MH policy
- Letter generation continues

**Table 12: Manufactured Home Pipeline Progress**

Activity	Prior Total	12/12-12/18	12/19-12/25	12/26-1/1	1/2-1/8	1/9-1/15	Cumulative Total
Total number of Manufactured Home Applications	16,308	1	-	4	-	3	<b>16,316</b>
Total Manufactured Home Evaluations verified	16,035	-	-	2	2	-	<b>16,039</b>
Total Pre-Storm Values verified	14,548	19	9	10	8	9	<b>14,603</b>
Total Applications released into letter generation process	14,548	19	9	10	8	9	<b>14,603</b>

### Home Evaluations (Home Inspection) Activity

- Addressed 563 Grant Review issues
- Addressed 900 ECD mismatch issues
- Addressed 50 Appeals
- Addressed 28 CAD disputes
- Addressed 8 State Appeals
- Addressed 10 Critical Issues
- Addressed 8 FEMA Eligibility Appeals
- Addressed 4 Structure-Type Issues
- Completed 16 Elevation Grants
- Addressed 175 Elevation Appeals
- Reviewed 21 Post-Accepted Edit Cases and identified 1 for additional review

**Table 13: Home Evaluation Team Metrics**

ACTIVITY	Prior Total	12/12-12/18	12/19-12/25	12/26-1/1	1/2-1/8	1/9-1/15	Current Total	Five Week Average
Work Orders Submitted by Housing Advisors	165,119	2	2	2	1	3	165,129 <sup>a</sup>	2
Work Orders Dispatched	162,962	4	2	2	1	3	162,974	2
Evaluations Completed in the Field	161,147	15	-	11	11	10	161,194 <sup>b</sup>	9

<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 January 15, 2009, 15,135 cases have been processed through the Appeals department, 14,460 have been resolved, and 675 are active. Table 14 shows the status of these cases.

**Table 14: Status of Appeals**

ACTIVITY	As of COB 12/18	As of COB 12/25	As of COB 1/1	As of COB 1/8	As of COB 1/15
Total Cases Processed	14,871	14,962	14,989	15,071	15,135
Appeal Cases Pending Decision/Research	847	790	744	696	647
Ineligible Status Appeal	35	35	29	25	28
Total Active Cases	882	825	773	721	675
Total Cases Resolved	13,989	14,137	14,216	14,350	14,460

Further analysis of the resolved appeals cases (14,460) shows that:

- 5,068 (35%) have resulted in additional funds being awarded to applicants for a total of \$134,644,072. The average additional disbursement is \$26,568
- 634 (4%) resulted in a reduction of award for a total of \$10,203,599. The average reduction is \$16,094
- 4,536 (31%) resulted in no change to the award amount
- 4,222 (29%) were reviewed for an eligibility determination, 1,525 were approved and 2,697 were denied

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

ACTIVITY	As of COB 12/25	As of COB 1/1	As of COB 1/8	As of COB 1/15
Total Cases Requested for State Panel Review	2,356	2,547	2,645	2,734
State Appeal Cases in Progress	935	1,078	1,078	1,062
State Appeal Cases Resolved	1,421	1,469	1,567	1,672

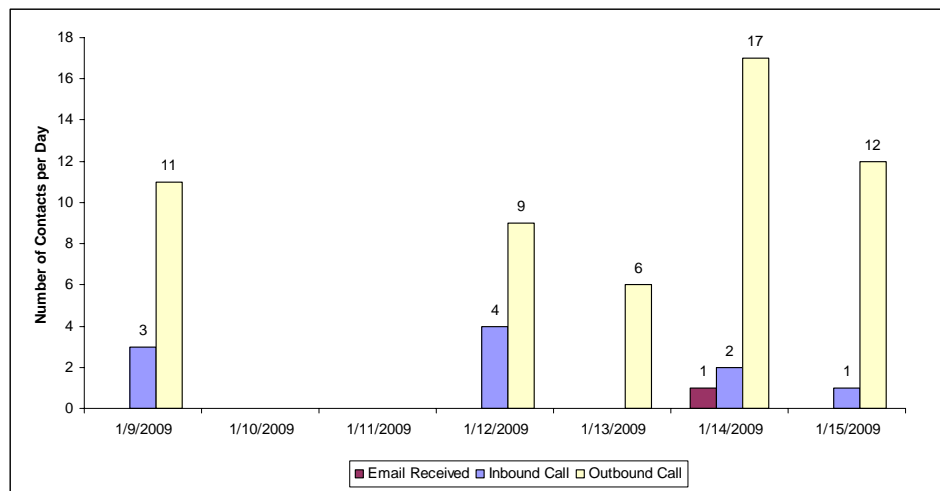
### Personal Application Liaisons (PAL)

During the reporting week, 66 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	12/12-12/18	12/19-12/25	12/26-1/1	1/2-1/8	1/9-1/15	Current Total
Email Received	3,730	4	21	0	2	1	3,758
Inbound Calls	17,696	37	16	6	18	10	17,783
Outbound Calls	61,776	138	82	67	95	55	62,213
<b>Total Contacts</b>	<b>83,202</b>	<b>179</b>	<b>119</b>	<b>73</b>	<b>115</b>	<b>66</b>	<b>83,754</b>

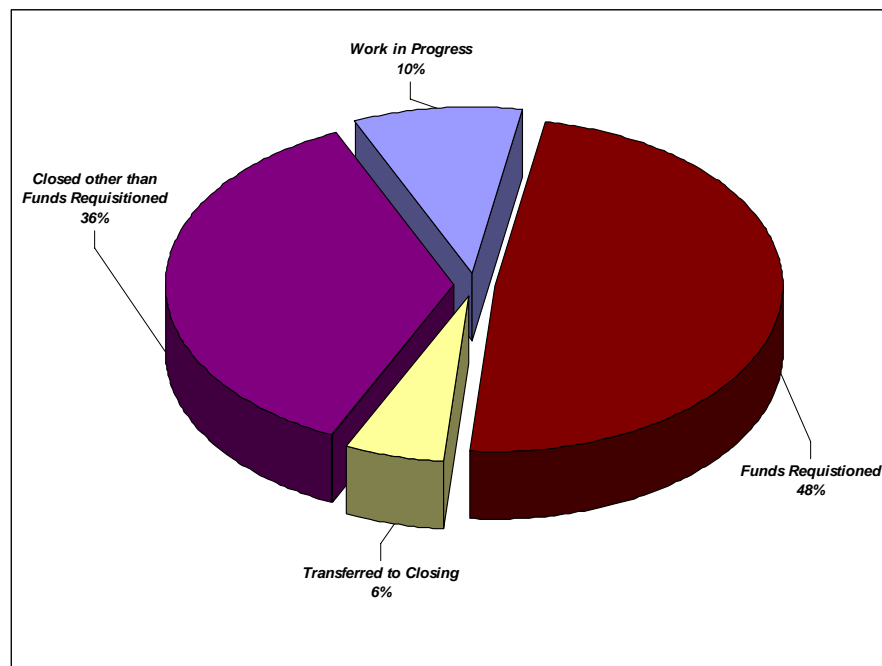
**Figure 6: PAL Contacts by Day**



As of January 15, a total of 38,271 applicant files have moved forward through the PAL initiative. Figure 7 shows the PAL application breakdown.

- A total of 3,657 applicant files are being worked by PAL staff
- A total of 34,614 applicant files have progressed to the closing process as the result of PAL efforts
  - 2,179 are in a transmitted to closing status
  - 18,554 have closed and are at a status of Funds Requisitioned
  - 13,881 have closed and are at a status of other than Funds Requisitioned

**Figure 7: PAL Application Breakdown**





# Weekly Situation & Pipeline Report

## Week 133

January 9, 2009 – January 15, 2009

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

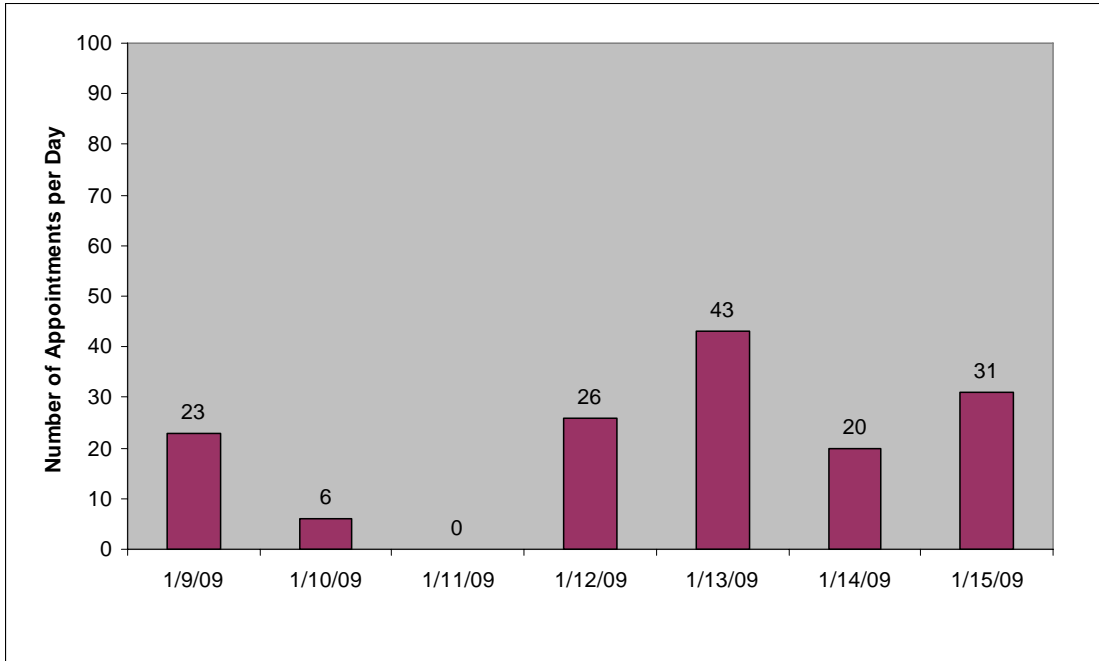
**Table 17: PAL Issues by Category**

Issue Category	# Apps
Advisory Services	6
Affordable Compensation Loan	27
APPEALS	173
Applicant Info	73
Application Completion	16
Appraisal	50
BPO	9
Compliance Review	40
CREDCO	18
Delay of Benefit	7
ECD	24
EGrant Calculation	9
Elevation	15
FEMA	22
FEMA Ind Assist	2
Flood Ins (NFIP)	1
Grant Review	3
Home Eval	4
Home Evaluation	27
Homeowner dispute or decision pending	29
Info Request	20
Insurance	51
Lawsuit Pending	3
Legal Costs	2
Missing Documentation	244
Multiple Issues	32
Option Change	2
Option Letter	13
Other	159
Outlier	10
Owner Occupancy	43
Ownership	249
Policy Appeal	1
Pre-Storm Value	49
Program eligibility pending	62
QA Outliers	2
Request Appraisal	1
State Appeal	29
Status Change	864
Title	365
Title - Post Closing	1
Zero Benefit	23
<b>Total</b>	<b>2,780</b>

### Housing Assistance Center Appointment Activity

There were a total of 149 RHAS appointments held at the Housing Assistance Centers during the reporting period. (Figure 8).

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



**Table 18: Housing Assistance Center Appointments by Week**

ACTIVITY	Prior Total	12/12-12/18	12/19-12/25	12/26-1/1	1/2-1/8	1/9-1/15	Current Total	Five Week Average
<b>RHAS Appointments Held</b>	62,077	162	101	85	133	149	<b>62,707</b>	<b>126</b>
<b>Average Daily RHAS Appointments Held</b>		27	21	21	27	25		

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

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

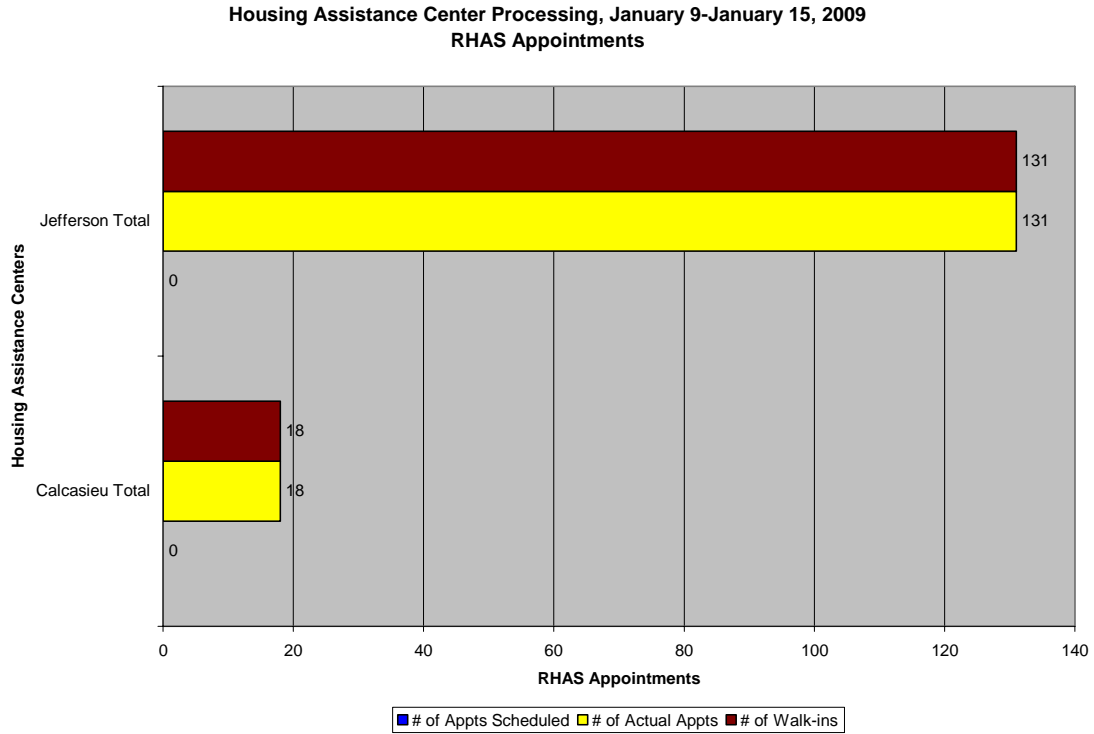
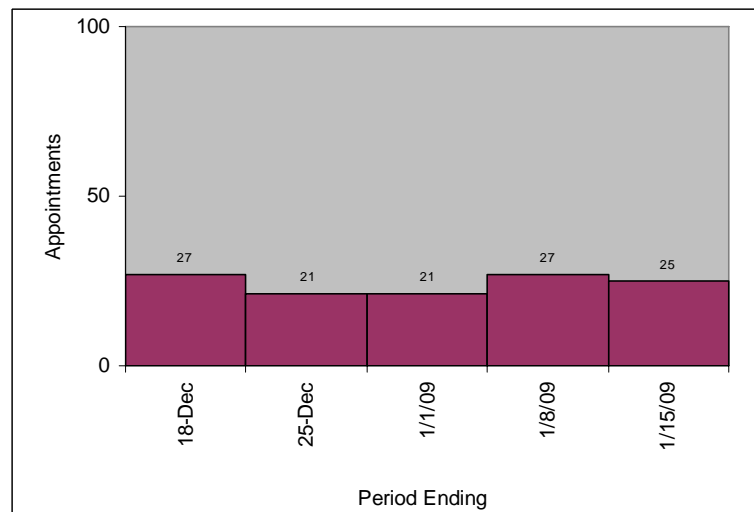


Figure 10 shows the average number of RHAS appointments per day over the current and previous periods.

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



## RENTAL PROPERTY PROGRAM

### Underwriting

- Continued 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		198	
<b>VERIFICATION STAGE</b>						
Active Awards	729		3,600		1,589	
<b>COMMITMENT LETTER STAGE</b>						
Commitment Letters Mailed	689		3,115		1,094	
Commitment Letters Returned by Applicant		551		2,170		718
<b>POST COMMITMENT STAGE</b>						
0 - 24% Construction Complete		145		714		147
25 - 49% Construction Complete		64		192		113
50 - 74% Construction Complete		47		168		36
75 - 100% Construction Complete		295		1,096		422
Total	551		2,170		718	

### Appeals

- Received 5 new appeals
- Completed 14 Appeal Review Determinations
- Mailed 14 Determination Letters

**Table 20: Status of Appeals**

Appeals	Round 1	Round 2	Round 2 Waitlist (Round 2.1)	Program Total
Level II Issues Received	342	561	639	<b>1,542</b>
Level II Issue Determinations Made	330	538	624	<b>1,492</b>
Level II Issues Remaining to be Resolved	12	23	15	<b>50</b>

**Table 21: Appeals Determinations Summary**

Appeals Determination After Road Home Review	Cumulative Total
Approved	299
Denied	1,086
Dismissed	96
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	145	135	35	315
OO Award Received Via HAP	0	8	0	8
Net Current/Active OO Unit Awards	145	127	35	307
OO Unit Award Letters Mailed	144	124	32	300
No Acceptance Required	23	26	3	51
Outstanding OO Unit Award Acceptances	1	1	1	3
OO Unit Award Acceptance Received	121	97	28	246
OO Unit Award Closings Held	105	79	19	203

### URA

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

**Table 25: Relocation Activity**

URA				
Occupied Properties	Round 1	Round 2	Round 2 Waitlist (Round 2.1)	Program Total
Total Properties	165	634	184	983
Total Units	310	561	220	1,091
Total Occupied Units	251	502	196	949

### 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	10
Round 2	68
Round 2 Waitlist (Round 2.1)	58
Appeals	12
New Program Options	12
Other	101
<b>Total Inbound Calls</b>	<b>257</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 *		4,950
Appointments Not Required		3,626
Appointments Required		1,324
Appointments Completed		982
Appointments to be Completed		342

\*Includes applicants contacted multiple times

## **PROGRAM SUPPORT STATUS**

### **HUMAN RESOURCES**

- Drafted the "2008 HUD Section 3 Summary Report," detailing the economic opportunities planned and generated by *The Road Home* Program, to the greatest extent feasible, to provide pre- and post-employment training options to low- and very low-income persons and to provide subcontracting to Section 3 business concerns impacted by Hurricanes Katrina and Rita.

### **LOGISTICS**

- Property
  - 2008 4th Quarter Property audit ongoing

### **POLICY**

- Responded to policy questions from staff
- Updated Homeowner Program Policies to reflect recently signed policy clarifications and distributed draft for internal review
- Responded to policy questions from auditor
- Reviewed policy issues with Grant Review Tier 2 team

### **INFORMATION TECHNOLOGY**

- Delivered SRPP monitoring report of closed loans
- Provided support of eGrants end users and Operations Management through issue resolution/task completion (approximately 184 completed/resolved) via the ithomeownersupport inbox
- Gathered and analyzed Operations request for two new statuses in eGP
- Facilitated implementation of ADCOMEXHAUST, ADPOLEXHAUST, and SPECREVCOM into eGP
- Delivered GIS maps to the Governor's Office of Homeland Security and Emergency Preparedness
- Completed a *Road Home* applicant historic district analysis for OCD
- Provided analysis and support for management regarding LLA, OCD, and ICF audit requests
- Processed the weekly TRH report for LLA
- GIS ran and uploaded Spatial Exceptions into the data warehouse
- GIS provided updated census tract, closing, and Congressional District data for Business objects universes
- Updated WIMBY maps and critical infrastructure

### TRAINING

- Coordinating Homeowner scenario training for OCD
- Planning new hire training for transition contractor
- Examining Quality Review findings to determine training needs
- Updating training materials based on policy changes

**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 January 15, 2009	2, 315
Internal	Housing Assistance Center Standard Operating Procedures Online Training	Homeowner Program Staff	Online	As of January 15, 2009	300
Internal	Updated Standards of Ethical Behavior	All Road Home Staff	Online	As of January 15, 2009	1, 421
External	Case Management for New Hires	Office of Community Development	Goodwood Office Baton Rouge, LA	January 12-13, 2009	6
Internal	Income Refresher/ACG Review Training	Appeals Staff	Customer Assistance Center Baton Rouge, LA	January 14, 2009	27
Internal	Income Refresher/ACG Review Training	Appeals Staff	Goodwood Office Baton Rouge, LA	January 15, 2009	25

### EXTERNAL AFFAIRS

#### Communications/Media Relations

**In support of Homeowner program:**

- Assisted Outreach Team with document retrieval project.
- Weekly metrics report distributed to media and posted to Web site.

**In support of Rental program:**

- Updating Rental communications portal with 2008 documents.
- State approved Rental program status report dated December 29, 2008, to post to Web site.
- Coordinating the on-going update, review and approval of Rental program guides, brochures and information sheets and Web content.



# Weekly Situation & Pipeline Report

## Week 133

January 9, 2009 – January 15, 2009

### Outreach

- Provided individualized Road Home updates via a presence at the St. Bernard Community Center in St. Bernard Parish and the Lower 9<sup>th</sup> Ward (NENA) in Orleans Parish, and LSU Ag Rebuilding Center in Orleans Parish.
- Completed retrieval attempts on 1,011 Post-Closing documents for applicant files in conjunction with ACG team.
- Completed retrieval attempts on missing documents in 80 aged incomplete files.
- Assisted with document retrieval needs on Audit, Monitoring, and Eligibility files.
- Assisted First American and HGI title companies in locating and scheduling previously unreachable applicants.
- Reviewed 250 unable-to-close files from First American and HGI to determine the barriers to closings and contacted applicants to determine their readiness to close and assist in solving pending issues.
- Advised 95 walk-ins at the Jefferson HAC.
- Monitored the Joint Legislative Committee on the Budget meeting.
- Met with applicants at Rep. Simone Champagne’s office in Iberia Parish
- Facilitated applicant progression via onsite presence at Catholic Charities/Salvation Army Office in New Orleans.
- Worked with elected officials and staff regarding constituent issues including:
  - U.S. Representative Joseph Cao
  - Sen. J. P. Morrell
  - Sen. David Heitmeier
  - Sen. Willie Mount
  - Sen. Nick Gautreaux
  - Rep. A.B. Franklin
  - Rep. Jerry “Truck” Gisclair
  - Rep. Simone Champagne
  - Rep. James Morris

**Table 27: Community Outreach Metrics**

Meeting Type	Events held 1/9-1/15	People reached 1/9-1/15	Events To Date	People Reached To Date
Community	8	106	954	51,799
Faith-Based	*	*	220	19,785
Business	*	*	32	1,402
Governmental	2	6	329	9,787
Case Managers	1	5	171	3,450
Rental	*	*	114	2,309
<b>TOTALS</b>	<b>11</b>	<b>117</b>	<b>1,820</b>	<b>88,532</b>

### 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**

ACTIVITY	Prior Totals	12/12 - 12/18	12/19 - 12/25	12/26 - 1/1	1/2 - 1/8	1/9 - 1/15	Current Totals
Applicant Issues Reported to Anti-Fraud	1,876	31	17	13	14	16	1,967
Evaluator Issues Reported to Anti-Fraud	5	-	-	-	-	-	5
Third-Party Issues Reported to Anti-Fraud	30	-	-	-	-	-	30



# Weekly Situation & Pipeline Report

## Week 133

January 9, 2009 – January 15, 2009

### **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

<b>PARISH</b>	<b>Option 1. Keep Your Home</b>	<b>Option 2. Sell, but Stay in Louisiana</b>	<b>Option 3. Sell, and Move out of Louisiana</b>	<b>Option 4. Decline Benefits</b>	<b>Option 5. Delay Selection of Benefit</b>	<b>Option 6. Unable to Determine Selection</b>	<b>Total</b>
Acadia	319	4		2			<b>325</b>
Allen	530	13	1	4	1		<b>549</b>
Ascension	161	2		2			<b>165</b>
Assumption	235	2		1	1		<b>239</b>
Beauregard	1,024	20		9	4		<b>1,057</b>
Calcasieu	13,627	202	14	218	81	4	<b>14,146</b>
Cameron	1,675	199	5	71	30	1	<b>1,981</b>
East Baton Rouge	201	4	1	2			<b>208</b>
East Feliciana	27	1					<b>28</b>
Evangeline	69	1		2			<b>72</b>
Iberia	1,105	27	2	10	2	3	<b>1,149</b>
Iberville	61	3					<b>64</b>
Jefferson	26,954	254	62	478	450	21	<b>28,219</b>
Jefferson Davis	952	19	2	7	9	4	<b>993</b>
Lafayette	124	3		1	1		<b>129</b>
Lafourche	852	12	1	9		1	<b>875</b>
Livingston	237	7	1	2	2		<b>249</b>



# Weekly Situation & Pipeline Report

## Week 133

January 9, 2009 – January 15, 2009

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	43,559	4,334	1,895	911	786	34	51,519
Plaquemines	3,252	353	45	95	75	6	3,826
Pointe Coupee	15						15
Sabine	33						33
Saint Bernard	7,848	4,254	812	464	256	20	13,654
Saint Charles	1,095	6	1	10	6	1	1,119
Saint Helena	286	2			1		289
Saint James	392			2			394
Saint Landry	172	6		1		1	180
Saint Martin	107	5		1			113
Saint Mary	909	9		1	2		921
Saint Tammany	11,446	227	56	167	178	9	12,083
St John The Baptist	1,344	2	1	8	11	1	1,367
Tangipahoa	1,606	13	2	6	1	1	1,629
Terrebonne	2,678	82	3	27	10	6	2,806
Vermilion	1,685	88	4	48	9	1	1,835
Vernon	155	2		1	2		160
Washington	1,482	19	1	8	10		1,520
West Baton Rouge	14						14
West Feliciana	3						3
	<b>126,234</b>	<b>10,175</b>	<b>2,909</b>	<b>2,568</b>	<b>1,928</b>	<b>114</b>	<b>143,928</b>



# Weekly Situation & Pipeline Report

## Week 133

January 9, 2009 – January 15, 2009

### **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	661
Ascension	196
Assumption	281
Beauregard	1,178
Calcasieu	15,429
Cameron	2,116
East Baton Rouge	319
East Feliciana	38
Evangeline	88
Iberia	1,324
Iberville	92
Jefferson	33,409
Jefferson Davis	1,172
Lafayette	153
Lafourche	998
Livingston	298
Orleans	55,607
Plaquemines	4,126
Pointe Coupee	19

Parish	Number of Calculations
Rapides	1
Sabine	34
Saint Bernard	14,672
Saint Charles	1,446
Saint Helena	326
Saint James	464
Saint Landry	217
Saint Martin	135
Saint Mary	1,073
Saint Tammany	13,482
St John The Baptist	1,748
Tangipahoa	1,806
Terrebonne	3,180
Vermilion	2,006
Vernon	178
Washington	1,793
West Baton Rouge	20
West Feliciana	6
	<b>160,445</b>



# Weekly Situation & Pipeline Report

## Week 133

January 9, 2009 – January 15, 2009

### **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 121,449 rather than 121,461 reported in Daily Governor’s Report as of January 15, 2009, 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	278	2		280
Allen	460	9	1	470
Ascension	135			135
Assumption	196			196
Beauregard	897	8		905
Calcasieu	12,275	82	5	12,362
Cameron	1,439	106	2	1,547
East Baton Rouge	172	1	1	174
East Feliciana	27			27
Evangeline	51			51
Iberia	968	12	1	981
Iberville	50	1		51
Jefferson	23,538	121	19	23,678
Jefferson Davis	799	9		808
Lafayette	108	1		109
Lafourche	734	5	1	740
Livingston	199	2		201



# Weekly Situation & Pipeline Report

## Week 133

January 9, 2009 – January 15, 2009

PARISH	Option 1. Keep Your Home	Option 2. Sell, but Stay in Louisiana	Option 3. Sell, and Move out of Louisiana	Total
Orleans	39,135	3,192	1,282	<b>43,609</b>
Plaquemines	2,614	197	14	<b>2,825</b>
Pointe Coupee	13			<b>13</b>
Sabine	26			<b>26</b>
Saint Bernard	7,136	3,473	629	<b>11,238</b>
Saint Charles	922	3	1	<b>926</b>
Saint Helena	242	1		<b>243</b>
Saint James	341			<b>341</b>
Saint Landry	151	5		<b>156</b>
Saint Martin	92	3		<b>95</b>
Saint Mary	768	3		<b>771</b>
Saint Tammany	10,428	118	24	<b>10,570</b>
St John The Baptist	1,149			<b>1,149</b>
Tangipahoa	1,422	4	1	<b>1,427</b>
Terrebonne	2,335	41	1	<b>2,377</b>
Vermilion	1,513	45	3	<b>1,561</b>
Vernon	135	2		<b>137</b>
Washington	1,242	12	1	<b>1,255</b>
West Baton Rouge	12			<b>12</b>
West Feliciana	3			<b>3</b>
	<b>112,005</b>	<b>7,458</b>	<b>1,986</b>	<b>121,449</b>



# Weekly Situation & Pipeline Report

## Week 133

January 9, 2009 – January 15, 2009

Zip Code	Number of Closings
Zip code not provided	21
70001	834
70002	909
70003	2,240
70005	732
70006	1,361
70011	1
70012	1
70014	1
70015	1
70017	11
70018	6
70019	4
70028	1
70029	1
70030	42
70031	43
70032	1,733
70033	1
70036	180
70037	445
70038	249
70039	84
70040	330
70041	681
70042	5
70043	4,739
70044	3
70045	3

Zip Code	Number of Closings
70046	10
70047	151
70048	2
70049	148
70050	201
70051	55
70052	41
70053	674
70054	1
70056	1,777
70057	107
70058	3,031
70059	5
70062	871
70063	6
70064	4
70065	3,570
70066	7
70067	401
70068	697
70069	9
70070	122
70071	45
70072	4,149
70073	6
70074	1
70075	1,341
70076	13
70077	1

Zip Code	Number of Closings
70078	18
70079	20
70080	15
70081	1
70082	124
70083	719
70084	226
70085	1,438
70086	66
70087	294
70090	164
70091	95
70092	1,922
70093	2
70094	1,886
70095	2
70096	1
70101	15
70104	1
70105	1
70107	1
70109	1
70110	1
70112	71
70113	388
70114	1,222
70115	1,312
70116	702
70117	5,468



# Weekly Situation & Pipeline Report

## Week 133

January 9, 2009 – January 15, 2009

Zip Code	Number of Closings
70118	2,235
70119	3,281
70120	1
70121	394
70122	7,402
70123	500
70124	3,431
70125	1,544
70126	5,862
70127	3,756
70128	3,359
70129	1,843
70130	206
70131	1,366
70132	1
70150	1
70164	1
70170	1
70174	1
70175	2
70177	7
70179	1
70183	1
70189	1
70217	1
70219	1
70224	1
70230	1
70301	178

Zip Code	Number of Closings
70302	2
70339	5
70340	19
70341	49
70342	5
70343	28
70344	586
70345	90
70346	57
70352	1
70353	175
70354	49
70355	7
70356	160
70357	49
70358	209
70359	79
70360	130
70361	5
70363	704
70364	127
70372	10
70373	15
70374	37
70377	268
70380	79
70381	2
70390	106
70391	4

Zip Code	Number of Closings
70392	38
70393	6
70394	244
70395	32
70397	152
70401	163
70403	227
70404	13
70420	108
70421	11
70422	276
70423	1
70424	1
70426	171
70427	694
70429	4
70430	1
70431	104
70433	281
70434	9
70435	250
70436	16
70437	137
70438	345
70440	1
70441	158
70442	5
70443	166
70444	179



# Weekly Situation & Pipeline Report

## Week 133

January 9, 2009 – January 15, 2009

Zip Code	Number of Closings
70445	642
70446	42
70447	74
70448	478
70449	16
70450	54
70451	28
70452	397
70453	8
70454	189
70455	12
70456	101
70457	1
70458	3,226
70459	10
70460	1,918
70461	2,678
70462	64
70463	15
70464	6
70465	33
70466	58
70467	3
70469	3
70470	5
70471	215
70478	1
70485	1
70501	25

Zip Code	Number of Closings
70503	4
70506	12
70507	12
70508	7
70510	587
70511	1
70512	13
70514	126
70515	11
70516	2
70517	43
70518	12
70519	3
70520	9
70521	1
70522	14
70523	20
70524	2
70525	21
70526	114
70528	300
70529	9
70531	11
70532	114
70533	631
70534	3
70535	32
70537	3
70538	434

Zip Code	Number of Closings
70540	1
70542	51
70543	25
70544	193
70546	232
70548	104
70549	62
70550	2
70551	2
70552	9
70554	9
70555	13
70556	11
70559	20
70560	654
70562	1
70563	26
70569	2
70570	96
70575	2
70576	2
70577	3
70578	60
70581	23
70582	40
70583	7
70584	5
70585	1
70586	18



# Weekly Situation & Pipeline Report

## Week 133

January 9, 2009 – January 15, 2009

Zip Code	Number of Closings
70589	8
70591	157
70592	23
70601	2,875
70602	7
70605	1,622
70606	11
70607	1,951
70609	1
70610	1
70611	981
70612	5
70614	1
70615	1,181
70616	6
70621	1
70630	118
70631	576
70632	179
70633	466
70634	456
70637	14
70638	2
70639	4
70640	34
70641	2
70643	110
70644	2
70645	268

Zip Code	Number of Closings
70646	64
70647	591
70648	162
70650	13
70651	12
70652	69
70653	59
70654	11
70655	138
70656	11
70657	220
70658	26
70659	14
70660	106
70661	235
70662	3
70663	1,285
70664	14
70665	564
70667	1
70668	373
70669	617
70699	1
70702	1
70706	13
70707	1
70711	16
70714	17
70716	1

Zip Code	Number of Closings
70717	2
70718	3
70719	4
70721	15
70722	18
70723	38
70725	7
70726	31
70727	1
70728	1
70729	1
70730	4
70733	5
70734	7
70737	33
70739	7
70740	2
70744	15
70748	1
70749	1
70750	1
70753	1
70754	9
70757	2
70760	6
70761	1
70763	18
70764	12
70767	9



# Weekly Situation & Pipeline Report

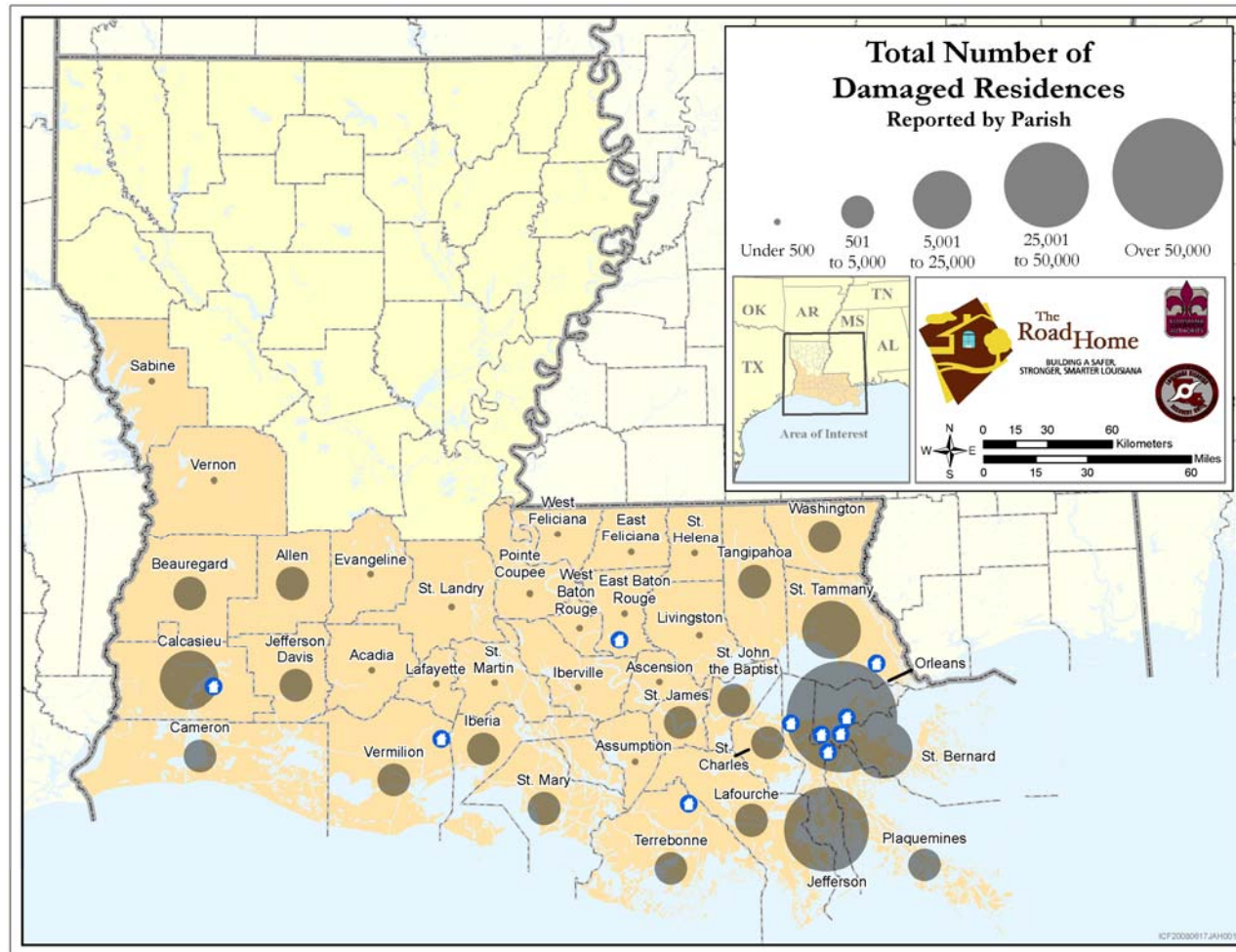
## Week 133

January 9, 2009 – January 15, 2009

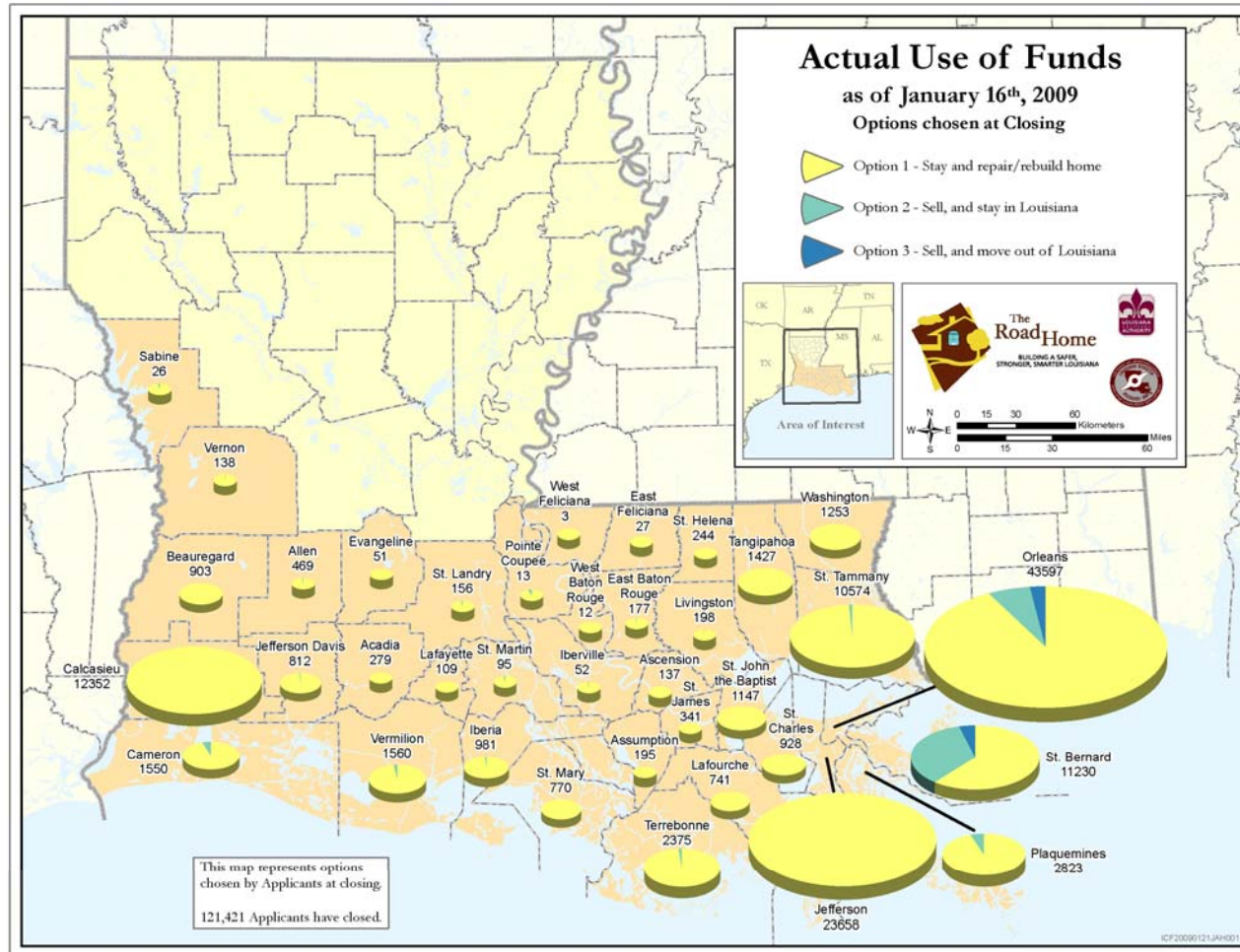
Zip Code	Number of Closings
70769	17
70770	4
70772	1
70774	7
70775	7
70776	5
70777	4
70778	9
70780	4
70783	1
70785	22
70788	10
70789	2
70791	12
70792	1
70802	20
70805	27
70806	5
70807	8
70808	3
70809	1
70810	7
70811	7
70812	11
70814	16
70815	9
70816	5
70817	9
70818	1
70819	4

Zip Code	Number of Closings
70820	2
70856	1
70901	1
71026	1
71027	1
71028	1
71119	1
71126	1
71295	1
71322	1
71353	5
71367	11
71403	13
71419	1
71429	3
71433	1
71439	2
71446	73
71449	12
71458	1
71460	1
71461	4
71462	1
71463	67
71474	2
71486	5
71496	1
	<b>121,449</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.



# Weekly Situation & Pipeline Report

## Week 133

January 9, 2009 – January 15, 2009

---

**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

## Week 133

January 9, 2009 – January 15, 2009

---

**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).