

# *Why Monitor Progress?*

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- Communicate desired outcomes at the start
  - Quickly identify problem areas
  - Assess outcomes, success & trends
  - Tell your story
  - Facilitate communication with partners & other stakeholders
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# *Monitoring Progress*

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It's a lot easier to collect  
information from the beginning  
than to try to find it later!!

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# *Telling the Story: Successful Outcomes*

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## Telling the Story: Successful Outcomes

- Participants
  - Your PHA
  - Partners
  - HUD
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# *Participant Outcomes*

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- Higher employment rate
  - Higher, more stable incomes
  - Basic needs addressed:
    - health care
    - child care
    - transportation
    - education
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# PHA Outcomes

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- All vouchers leased within 12 months
  - Closer, more productive partnerships
  - No budget overruns
  - All HUD requirements satisfied
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# *Partner Outcomes*

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- Will vary by partner
  - Include partners when setting these goals
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# *HUD Outcomes*

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- Tied to outcomes for participants and PHAs:
    - all vouchers leased up
    - participants find and hold jobs
    - other positive effects for participants
  - Program compliance
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# *Monitoring Progress*

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What Kind of Data Should be Collected?

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## *Basic Items to Monitor*

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- Baseline information, goals, and projections
  - Input (efforts expended)
  - Outcomes
  - Activities (input/outcomes) by partners
  - Trends over time
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# *Key Monitoring Areas*

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- Lease-up
  - Participant employment rates
  - Participant income levels
  - Other participant demographics
  - Supportive services
  - Family status
  - Program finances
  - Partnerships
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# *Lease-up*

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- Planned vs. actual schedules
  - Location and quality of leased units
  - Location and quality of previous units
  - Estimated and actual gross rents
  - Average search time
  - Leasing success rate
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## *Participant Employment Rates*

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- Income sources at issuance and thereafter
  - Job losses/changes/periods of return to unemployment or welfare benefits
  - Employment stability (periods of uninterrupted employment)
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# *Participant Income Levels*

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- Average or median annual income from period to period
  - Average or median increase in earned income
  - Contributions made/received from FSS escrow accounts by WtW families
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# *Other Participant Demographics*

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- Target population assumptions
  - Target vs. actual recipients
  - Selected families
  - Participants (MTCS data)
  - “Successful” vs. “unsuccessful” families
  - Changes over time
  - Additional data?
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# *Supportive Services*

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- Services that will be required
  - Level of effort of partners
  - Quantification of services provided
    - number of families served
    - services families received
    - money/staff hours expended
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# *Financial Data*

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- Budget vs. actual costs
    - administrative costs
    - subsidy costs
    - staff hours
  - Trends
    - rents
    - tenant contributions
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# *Partnerships*

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- Execution of MOUs
    - fulfilling responsibilities
    - working effectively
    - overcoming obstacles
  - Number and roles of partners
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# *Monitoring System*

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Monitoring Progress requires developing a good monitoring system

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# *A Good Monitoring System:*

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- Tells user what is important
  - Provides critical information
  - Is user-friendly
  - Is efficient
    - no duplication of efforts among partners
    - no duplication of information provided by participants
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# *Suggested Approach*

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- Maximize use of current systems
    - MTCS
    - PHA software
    - partners' reporting/tracking systems
  - Develop additional tracking systems for missing items
  - Assess tradeoffs
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# *Suggested Tools*

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- Analyzing data needs
  - Recipient tracking form
  - Monthly reports for Executive Director and partners
  - Quarterly or semi-annual/annual report
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