

# Housing Mobility Toolkit: Updating Program Materials

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# Welcome

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HUD's Office of Public Housing and Voucher Programs



# Introduction to Housing Mobility Programs

- Combination of administrative policies, client services, financial assistance, and owner outreach activities aimed at helping Housing Choice Voucher (HCV) holders move into and maintain residency in Opportunity Areas
- Assist low-income families, subsidized by HCVs, to live in middle- and high-income communities and benefit from the community's resources
- Housing Mobility Programs help to fulfill a variety of goals:
  - Racial and economic integration
  - Social mobility and health benefits
  - Reducing harms associated with living in high-poverty communities
  - Affirmatively furthering Fair Housing



## Toolkit Audience

- PHA(s) and their service providers in order to develop their own Housing Mobility Program
- Requires participation by PHAs in order to make administrative/process updates to improve chances of families leasing in Opportunity Areas
- Significant customization required to put toolkit contents into practice
  
- Available for download here:  
<https://www.hudexchange.info/programs/public-housing/housing-mobility-toolkit/>





Program  
Setup  
Attachments:  
Updating  
Housing  
Mobility  
Toolkit  
Materials







# Housing Mobility Toolkit Materials

## Program Setup




### Program Setup Attachments

-  Enrollment and Caseload Estimator (Excel)
-  Sample First Year Annual Budget (Excel)
-  Sample Materials for Program Staffing (Word)
-  Sample Case Management System Data Collection (Word)






### Housing Search Workshop Materials

-  Housing Search Workshop (PPT)
-  Housing Search Workshop Facilitator Guide (Word)
-  Housing Search workshop Group Activities (Word)
-  Housing Search Workshop Participant Booklet (Word)

### Money Management Workshop Materials




















-  Money Management Workshop (PPT)
-  Money Management Workshop Facilitator Guide (Word)
-  Money management Workshop Participant Booklet (Word)

### Renter's Workshop Materials

-  Renter's Workshop (PPT)
-  Renter's Workshop Quizpop (PPT)
-  Renter's Workshop Facilitator Guide (Word)
-  Renter's Workshop Participant Booklet (Word)
-  Quizpop Instructions (Word)

## Program Manual

### Program Manual Attachments

-  Client Binder (Word)
-  Client Binder Example (PDF)
-  Introduction to the Mobility Program (PPT)
-  Introduction to the Mobility Program Facilitator Guide (Word)
-  Sample Outreach and Enrollment Calendar (Word)
-  Sample Current Voucher Holder Outreach Letter (Word)
-  Sample Outreach Email Response Script (Word)
-  Sample Phone Call Script (Word)
-  Sample Webpages (Word)
-  Sample Owner Brochure (Word)
-  Sample Participant Brochure (Word)
-  Sample Address Locator Tool (Word)
-  Sample Affordability Calculator (Excel)
-  Sample Administration Calendar (Word)
-  Sample Financial Coaching Referral Email (Word)
-  Sample Post-Move Assessment (Word)
-  Sample Damage Mitigation Fund Application (Word)
-  Sample Security Deposit Promissory Note (Word)
-  Sample Utility Arrears Payment Request Form (Word)

## Overarching Recommendations

- The materials were developed with a specific program model and set of program policies that may or may not be applicable to your final program design
- Rules and regulations for the HCV program were current as of March, 2023 – materials may require updates as HCV rules change
- Some sections **require** updates:
  - PHA-specific policies
  - Final versions of financial assistance and financial incentives
  - Denoted with brackets and highlights, for example: “[Update to reflect final program parameters]”
- Read everything, but when in doubt, control+F for:
  - Brackets
  - Naming conventions

# Program Setup Attachments

- **Updating Housing Mobility Toolkit Materials:** A description of how to update materials for programs' individual use
- **Enrollment and Caseload Estimator:** Calculator to estimate the number of active participants based on the number of invitations sent to HCV households, and assumptions about the percentage of accepted invitations and drop off between program phases
- **Sample First Year Annual Budget:** Calculator to estimate program costs based on a number of assumptions
- **Sample Materials for Program Staffing:** Description of program roles, sample job postings, and sample training plans
- **Sample Case Management System Data Collection:** A list of tables and datapoints to consider including in a case management system for a Housing Mobility Program



PROGRAM SETUP  
ATTACHMENTS:

# Enrollment and Caseload Estimator

Enrollment and Caseload Estimator											
Instructions: Update the cells in blue and the cells in green will update automatically. See the Mobility Toolkit: Program Setup document for additional											
Take up and Attrition Assumptions											
Invitation to Enrollment	Enrollment to Pre-Move Appt	Family Prep to Searching	Searching to Lease up	Lease up to post-move	Phase 7 Clients Requesting Another Pre-Move appt						
20.0%	97.0%	88.0%	31.0%	97.0%	10.0%						
Program Month	L-6 Invite	L-5 Phase 1: Enrollment	L-4 Phase 2: Pre-move appt	L-3 Phase 3: Family Prep	L-2 Phase 4: Searching & Apps	L-1 Phase 5: Leasing up	L+1 Phase 6: Post-Move	Phase 7: Completed Search	Coach Caseloads	Leasing Coordinator Caseloads	Move Rate
1	85								0.0	0.0	
2	85	17.0							0.0	0.0	0.00%
3	85	17.0	16.5						16.5	0.0	0.00%
4	85	17.0	16.5	16.5				0.5	33.0	0.0	0.00%
5	85	17.0	16.5	16.5	14.5			2.5	47.5	14.5	0.00%
6	85	17.0	16.5	16.5	14.5	4.5		12.5	52.0	14.5	0.00%
7	85	17.0	16.5	16.5	14.5	4.5	4.4	12.6	56.4	14.5	34.53%
8	85	17.0	16.5	16.5	14.5	4.5	4.4	17.0	56.4	14.5	34.53%
9	85	17.0	16.5	16.5	14.5	4.5	4.4	21.4	56.4	14.5	34.53%

Sample First Year Annual Budget

**Instructions:** Update numbers in columns C and G to reflect initial assumptions and projected per unit costs. Add or subtract line items to reflect final program parameters. See the Mobility Toolkit: Program Setup document for additional context.

Salaries and Benefits			Avg per Unit Cost	Total Cost	Initial Assumptions:*		
Team Lead	\$	70,000.00	\$	92,400.00	Benefits cost as % of salary:	32%	
Coach 1	\$	55,000.00	\$	72,600.00	Monthly enrollment:	17	
Coach 2	\$	55,000.00	\$	72,600.00	Number of months in Phase 2:	11	
Leasing Coordinator	\$	50,000.00	\$	66,000.00	Number of months in Phase 4:	8	
<i>Salaries and Benefits Subtotal</i>				\$	303,600.00	Avg applications per family:	1.5
<b>Program Costs</b>					Families needing transport assistance:	20%	
Credit reports	\$	10.00	\$	1,870.00	Avg transport pass needed per family:	12	
Application/admin/processing fees	\$	40.00	\$	8,160.00	Families needing utility assistance:	10%	
Public transportation passes	\$	2.75	\$	897.60	Number of months in Phase 5:	7	
Utility arrears/deposits	\$	500.00	\$	5,950.00	Holding fee take up %:	30%	
Holding fee loss	\$	650.00	\$	3,480.75	Holding fee loss %:	15%	
Renter's insurance	\$	129.00	\$	921.06	Number of months in Phase 6:	6	
Security deposits	\$	1,300.00	\$	46,410.00	Lease up rate:	35%	
Lease-up bonuses	\$	650.00	\$	23,205.00	Families needing renter's insurance:	20%	
Damage mitigation fund	\$	2,000.00	\$	-	Families leased for 12+ months:	0	
<i>Program Costs Subtotal</i>				\$	90,894.41	Owners requesting damage mitigation:	3%
<b>Other Direct Costs</b>					Number of program staff:	4	
Office supplies	\$	100.00	\$	400.00	Annual miles driven:	1200	
Marketing	\$	600.00	\$	600.00	Indirect cost %:	10%	
Computers	\$	1,200.00	\$	4,800.00			
Cell phones	\$	400.00	\$	1,600.00			
Shredders	\$	60.00	\$	240.00			
Case management system annual subscription	\$	300.00	\$	1,200.00			

\*Assumptions do not take into account attrition of participants between program phases except between phase 5 and 6, the lease-up rate.

PROGRAM SETUP  
ATTACHMENTS:

# Sample First Year Annual Budget

PROGRAM SETUP  
ATTACHMENTS:

# Sample Materials for Program Staffing

- Update job descriptions to reflect changes to program activities or responsibilities to roles
- Update to reflect applicable federal, state, or local laws
- Ensure they are in compliance with general PHA/organization policies, best aided by a review by legal/HR

PROGRAM SETUP  
ATTACHMENTS:

# Sample Case Management System Data Collection

- Datapoints, tables, and connection points between different tables to use as a starting point for developing a case management system
- Needs to be updated to reflect program activities and any other data the program creators want to collect

# Program Manual

- This is the primary training and reference tool for program staff to use in performing their activities and daily functions
- Requires extensive customizations in order to use and adopt for an individual program
  - Final set of activities selected for the program
  - Policies associated with the program activities
  - Financial assistance and incentives offered as a part of the program
  - Updates to goals, required materials, associated team members, and activity rationale

# Program Manual Example

## Fast Inspections

### Steps [to be determined at each PHA]

1. Each PHA should determine how to make this process work. Options might include:
  - a. Leaving time open in an inspector's schedule to allow for these expedited inspections.
  - b. Allowing the Leasing Coordinator to become HQS-certified to conduct inspections.
  - c. Have inspectors with more flexible schedules conduct the inspections.

### Rationale:

Similarly to the RFTA Filing Assistance activity, the fast inspections process reduces the time from application-acceptance to lease-signing. By reducing this timing, the program reduces the amount of time the unit sits vacant on the market, costing the property owner money. The reduction in time required also makes the HCV program work more similarly to the private market. |

### Goals:

- Schedule an inspection in a timely manner for Opportunity Area units
- Conduct an inspection soon after it is scheduled for Opportunity Area units

### Performed by:

Leasing Coordinator

### Required materials:

- Case Management System
- HCV line of business software

# Program Manual Attachments<sub>1</sub>

- **Client Binder:** A sample of the primary set of documents received by families in the Housing Mobility Program, saved as a Word document that may be updated for PHAs' use
- **Client Binder Example:** A filled out version of the "Client Binder," provided as an example of how Housing Mobility Program staff and the participant might fill out the "Client Binder"
- **Introduction to the Housing Mobility Program:** A PowerPoint presentation introducing the program to potential participants
- **Introduction to the Housing Mobility Program Facilitator Guide:** A facilitator guide, available as a Word document, to complement the Introduction to the Housing Mobility Program PowerPoint presentation
- **Sample Outreach and Enrollment Calendar:** A sample calendar offering a timeline for when to begin outreach to current voucher holders based on their recertification date
- **Sample Current Voucher Holder Outreach Letter:** A sample letter inviting current voucher holders to participate in the Housing Mobility Program
- **Sample Outreach Email Response Script:** A sample email response to a potential applicant who contacted the program via email inquiring about how to participate

# Program Manual Attachments<sub>2</sub>

- **Sample Phone Call Script:** A sample script responding to a potential applicant who called in to the program inquiring about how to participate
- **Sample Webpages:** Sample text for PHAs to use and adapt when developing their own program webpages
- **Sample Owner Brochure:** A sample tri-fold brochure Word document inviting property owners to participate in the Housing Mobility Program
- **Sample Participant Brochure:** A sample tri-fold brochure Word document inviting families with HCVs to participate in the Housing Mobility Program
- **Sample Address Locator Tool:** A Word document describing the purpose and function of an Address Locator Tool, including a link to a video with a sample Address Locator Tool
- **Sample Affordability Calculator:** An Excel file that enables the user to identify what a family can afford in contract rent by their voucher size, income, and payment standard area
- **Sample Administration Calendar:** A set of reoccurring tasks that a Housing Mobility Program administrator would need to perform regularly to help the Housing Mobility Program function efficiently and effectively



# Program Manual Attachments<sub>3</sub>

- **Sample Financial Coaching Referral Email:** An email offering an example of a warm hand off between the Housing Mobility Program and the referral partner
- **Sample Post-Move Assessment:** A sample assessment that may be used after a family moves into an Opportunity Area to identify if there are any unmet needs or issues that the family may need assistance with resolving in order maintain residency in their new unit
- **Sample Damage Mitigation Fund Application:** A sample application that a property owner would fill out to request reimbursement from a damage mitigation fund
- **Sample Security Deposit Promissory Note:** A sample promissory note from a PHA to a property owner that they will receive their security deposit after receipt of the executed lease
- **Sample Utility Arrears Payment Request Form:** A sample form for Housing Mobility Program staff to fill out on behalf of a family in order to pay a utility arrear so the family can establish a utility service at their new Opportunity Area unit

# Housing Mobility Program Participant Expectations Form

Housing Mobility Toolkit: Client Binder

## Housing Mobility Program Participation Expectations

**What you can expect from the Housing Mobility Program:** [update based on final program parameters]

- Help with thinking about the neighborhood(s) where you want to live.
- Referrals for at least two properties in Opportunity Areas 6 to 7 weeks before it's time for you to move.
- Help with paying application fees, administration fees, and transportation costs to view units in Opportunity Areas.
- 100% of security deposit and holding fees covered for Opportunity Area units.
- A faster inspection with the Housing Authority for a unit in an Opportunity Area.
- A lease-up bonus for your new property owner if you lease up in an Opportunity Area unit.
- A one-month check-in at your new home where we follow-up with you on any new resources that you might need in your new Opportunity Area neighborhood.
- Additional follow-ups after you move to help you settle into your new home and community.

**What the Housing Mobility Program expects from you:**

- To actively look for housing in Opportunity Areas and work with the program staff to contact property owners.
- To complete your Family Preparation activities discussed during your pre-move appointment.
- To communicate with the program staff when you fill out an application or turn in a RFTA packet for a new unit.

**Should you for any reason: (1) Stop communicating with program staff, or (2) Choose to renew your lease or move to a non-opportunity area, staff will no longer offer you the services or benefits associated with the Housing Mobility Program unless you choose to move again. Choosing to renew your lease or move to a non-opportunity area does not affect your status as a participant in the Housing Choice Voucher (Section 8) program.**

# Moving with the Housing Mobility Program Overview

Housing Mobility Toolkit: Client Binder

**Moving with the Housing Mobility Program Overview**  
Keep this document handy! It explains what will happen at each phase.

## Phase 1: Recruitment & Enrollment



If you are reading this, you have already completed Phase 1. Way to go!

## Phase 2: Pre-Move Appointment



During this phase you meet with your Coach and make a plan for moving your family. Discussion topics include: why you want to move, neighborhoods that would be a good fit for your family, activities to prepare you to make a successful move, and how to search for housing. This step is required for all program participants.

## Phase 3: Family Preparation



During the housing search workshop, you will learn how to search for units online and how to talk to property owners about the Housing Mobility Program and your voucher. You will meet with other families also searching for housing through the program. This workshop is encouraged for all Housing Mobility Program participants.



The Renter's Workshop prepares families to successfully lease-up and maintain their homes. The workshop covers moving-in and moving-out procedures, reading a lease, turning on utilities, managing maintenance issues, and choosing between different home types. Depending on your past experiences, this might be a good workshop for you to attend.



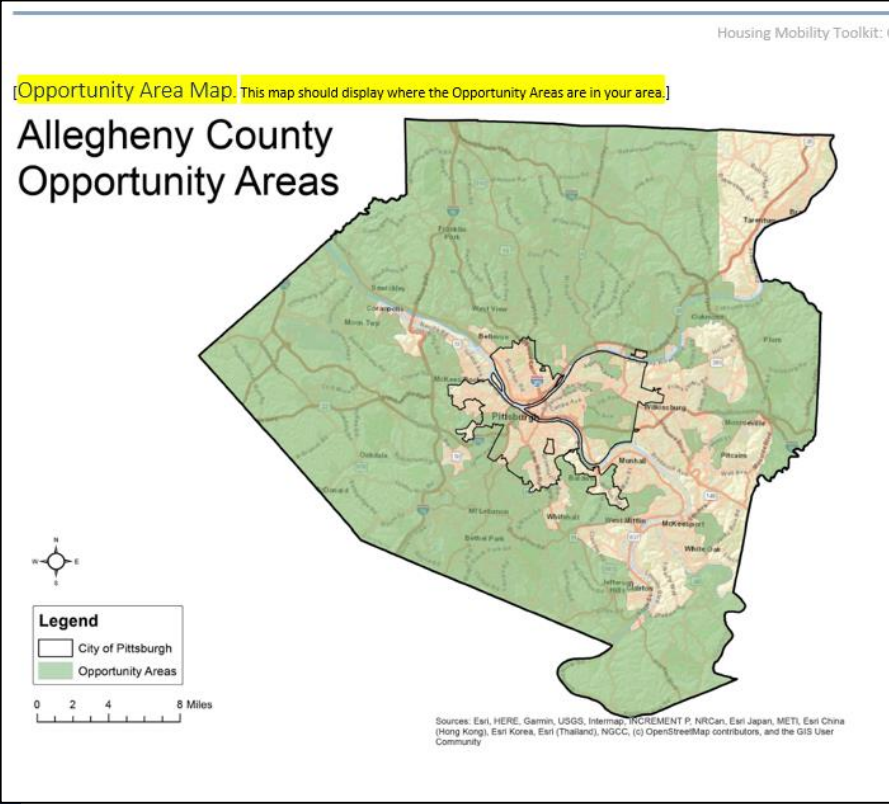
The Money Management Workshop helps families to prepare financially for their move. This includes moving into a new unit, furnishing the home, and managing rent and utility payments. Topics include: how to improve your credit score, how to cheaply move furniture or replace furniture, and planning for on time payments. This workshop is a great resource if you are looking to improve your financial health.

Some families need additional assistance beyond what the Housing Mobility Program provides to help them prepare to make a successful move. During your pre-move

PROGRAM MANUAL  
ATTACHMENTS:

Client Binder<sub>1</sub>

# Opportunity Area Map



# Neighborhood Descriptions

**[City of Pittsburgh Opportunity Areas]** Neighborhood profiles are meant to help families learn more about Opportunity Area neighborhoods and are based on Opportunity Areas in the PHA's area.

The city of Pittsburgh is comprised of 90 neighborhoods, each with its own distinct identity and personality. Many of the Pittsburgh Opportunity Areas are located in the East End, home to large city parks and trendy shopping districts. Most of the communities are walkable and easily accessible via public transportation, providing families with ample opportunities to shop, dine, hang out, and explore. The neighborhoods range from lively cultural centers to quaint communities in the hillside, making the city enjoyed by all.

**Points of Interest**

- **Parks:** Brookline Memorial Park, Emerald View Park, Frick Park, Highland Park, Mellon Park, Moore Park, Schenley Park
- **Business Districts:** Brookline Blvd, Bryant St, Centre Ave, Forbes Ave, Murray Ave, Penn Ave, S. Braddock Ave

**School Districts**

- City students attend the Pittsburgh Public School District
- Some of the top schools in the city are Fulton PreK-5, Brookline PreK-8, Colfax K-8, CAPA 6-12, Obama 6-12, and Alderdice High School

**Public Transit**

- The city is highly walkable and easy to get around by bus
- Martin Luther King Jr. East Busway serves the East End
- Some neighborhoods, like Brookline, have access to the T
- ✓ = Areas that are well connected by public transit

cultural clean  
**liveable** historic  
friendly **activity-filled**  
up-and-coming rowhouses  
**easy to get around**  
family-oriented safe  
**diverse** parks  
quiet

- Opportunity Areas in this region include:
- |              |                 |                       |
|--------------|-----------------|-----------------------|
| Banksville ✓ | Morning Side ✓  | Squirrel Hill North ✓ |
| Bloomfield ✓ | New Homestead ✓ | Squirrel Hill South ✓ |

## Credit Report Summary

**Credit Score Open Access Program for Credit and Financial Counseling**

<p><b>Example 2.0</b> The score no one uses Because it's an example</p> <p style="text-align: center; border: 1px solid black; padding: 2px;"><b>598</b></p>	<p><b>Provided for the exclusive use of:</b> Jane Doe</p> <p>Provided on: 2/12/2021</p> <p>Your score was pulled on: 2/12/2021</p> <p>Your score version: Example 2.0</p> <p>Your score is based on data from: TransUnion</p> <p>Your score rating: <b>Fair</b></p>
--	---

**Key Factors that Affect Your Credit Score**

**1. Serious delinquency**

Creditors consider a very late payment on a person's credit report as a powerful predictor of future their payment risk. Your score was lowered because your credit report shows one or more serious delinquencies or some other serious derogatory indicator, such as a bankruptcy, on your credit report.

**Things to Consider**

People with a previous late payment are more likely to also pay late in the future. These people are considered riskier to lenders. Most late payments stay on your credit report for 7 years. As a late payment ages, the impact it has on your score will decrease.

**2. Portion of balances to credit limits on revolving accounts is too high**

Account balances are evaluated in relation to available credit on revolving and/or open accounts. Due to a portion of your balances on credit limits being too high, your score was impacted.

**Things to Consider**

People who pay down revolving credit on a monthly basis show that they have the money to pay off their debts. Failing to completely pay down revolving accounts can me large interest is charged on your account. Additionally, consolidating or removing debt from one revolving account to another does not usually help because the total amount of debt owed remains the same.

**Additional Information**

**What is an Example 2.0?**

An Example 2.0 is a made up three digit score for the purposes of this example. There is no additional information that can be found out about it online. However, for FICO scores or Vantagescore credit scores, there is a lot of information available for users to investigate. Credit scores are used to assess your credit risk quickly, consistently, fairly, and objectively. People with higher credit scores are considered less risky because they have a history of paying back their debts on time.

**How can I learn more about my Example scores?**

## Financial Coaching Referral Example

Housing Mobility Toolkit: Client Binder

[Update to the PHA's financial Coaching Referral partner handout]



**Pittsburgh  
Financial  
Empowerment  
Center**

Free One-on-One  
Financial Counseling

Pittsburgh's Financial Empowerment Center (FEC) offers one-on-one, professional financial counseling as a free public service. The FEC helps clients take control of their debt, deal with debt collectors, improve their credit, create a budget, increase savings, connect to safe and affordable financial products, and much more!

**⇒ BANK SAFELY**

**⇒ ESTABLISH CREDIT**

**⇒ BUILD SAVINGS**

**⇒ REDUCE DEBT**

**OUR LOCATIONS:**

- Advantage CCS - 2403 Sidney St, #225, Pittsburgh, PA 15203
- PA CareerLink - 304 Wood St, Pittsburgh, PA 15222
- Reemployment Transition Center, Allegheny County EARN - 333 Forbes Ave, Floor 2, Pittsburgh, PA 15222
- CoLab18 - 100 S Commons, #100, Pittsburgh, PA 15212
- Pittsburgh Community Services Inc. - 249 N Craig St, Pittsburgh, PA 15213
- East End Cooperative Ministry - 6140 Station St, Pittsburgh, PA 15206

Contact us to schedule your FREE counseling session:

**Phone: 1-800-298-0237**

**Email: [fecinfo@advantageccs.org](mailto:fecinfo@advantageccs.org)**

# Family Preparation Plan

Housing Mobility Toolkit: Client Binder

## Family Preparation Plan

Why I am choosing to move:

What makes me a successful tenant and member of the community:

Select any items that may affect applications:

- Credit report
- Previous rental history
- Other:
- Previous criminal history
- Issue with a current property manager

Pre-searching family preparation steps to complete:

- Housing Search Workshop
- Renter's Workshop
- Financial Counseling Referral
- Legal Referral
- Application Cover Letter

Goal due date to complete all pre-search steps:

## Searching and Applications

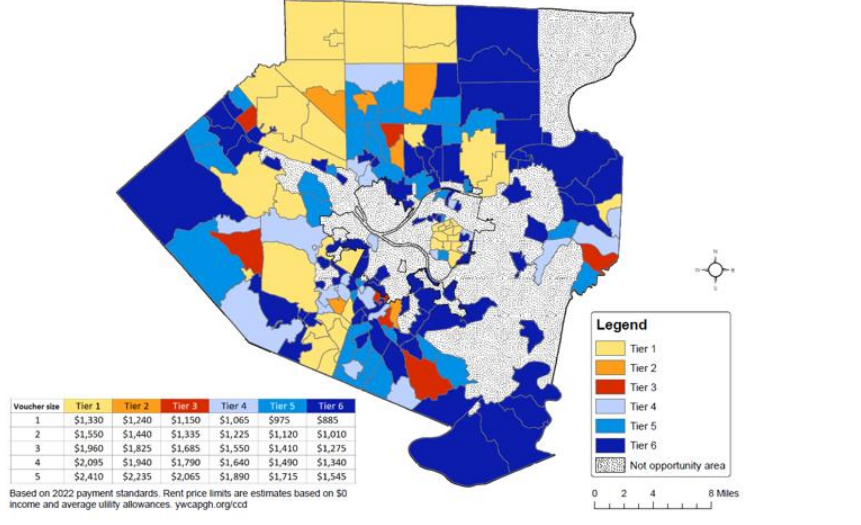
Primary area(s) of interest:

# Affordability Map

Housing Mobility Toolkit: Client Binder

[Affordability Map. This map should include information on affordability and payment standards in addition to the Opportunity Areas.]

## Pittsburgh – Allegheny County Affordability



## Tips for Searching for Housing

Housing Mobility Toolkit: Client Binder

### Tips for Searching for Housing Online

Some popular sites to begin your online search:

Zillow.com  
Trulia.com  
Craigslist.org  
Apartments.com  
AffordableHousing.com  
Facebook Marketplace  
property rentals

Use filters to find units that match your needs

Location  
Number of bedrooms  
Home type  
Price

**Beware of Scammers** that will waste your time and money. Do not provide identifiable information about yourself until you have seen a unit and you are filling out an application. You should never have to pay money to see a unit.

Housing Mobility Program

[Address line 1]

### Get Organized with Everything You will Need

- Internet access
- A smart phone or computer
- The list of neighborhoods you are interested in
- A script ready for speaking to property owners

### Conduct the Search

- Start by searching for homes that fit your unit needs in your neighborhoods of interest.
- Think about how much you can afford based on the area you are looking in – is the unit in [Tier 1, 2, 3 or 4]?

#### What I can afford in:

Tier 1:

Tier 2:

Tier 3:

Tier 4:

- Check to make sure that a unit you are interested in is both:
  - (1) In an Opportunity Area
  - (2) Affordable for you
- The Housing Mobility Program will only cover security deposits and assist with inspections and lease-ups for units in Opportunity Areas.

[Link to Opportunity Area Address Locator tool]

## Workshop Calendars

Housing Mobility Toolkit: Client Binder

### October 2022 Mobility Program Workshop Calendar

September '22							November '22								
S	M	T	W	T	F	S	S	M	T	W	T	F	S		
				1	2	3					1	2	3	4	5
4	5	6	7	8	9	10	6	7	8	9	10	11	12		
11	12	13	14	15	16	17	13	14	15	16	17	18	19		
18	19	20	21	22	23	24	20	21	22	23	24	25	26		
25	26	27	28	29	30		27	28	29	30					
							30	31							

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
2	3	4	5	6	7	8 In-Person Housing Search Workshop 10:00-12:00pm 305 Wood St Pittsburgh, PA 15222
9	10	11	12	13 Virtual/In-Person Renter's Workshop 10:00-12:00pm Microsoft Teams & 305 Wood St, Pittsburgh, PA	14	15
16	17	18 In-person Renter's Workshop 6:00-8:00pm 305 Wood St Pittsburgh, PA 15222	19	20	21	22
23	24	25	26	27 Virtual/In-Person Housing Search Workshop 10:00-12:00pm Microsoft Teams & 305 Wood St, Pittsburgh, PA	28	29
30	31	1	2	3	4	5

## Application Cover Letter

Housing Mobility Toolkit: Client Binder

### Application Cover Letter [Update so the example reflects the PHA's area]

Creating an application cover letter is a great way to make a good first impression with property owners. It can also help your application stand out.

Use this template to organize information about you and your family. Use a computer or write a draft letter by hand and have a Housing Mobility Program staff member help you make a computer version.

Once you create the letter, you can give it to property owners and managers when you tour units and apply to rent a home.

**CONTACT INFO** | Your Name  
Street address, city, state zip code  
email | telephone

To whom it may concern:

**LOOKING FOR** | Answer the following questions in your intro:

- What size unit are you looking for?
- How many people are in your household?
- What type of neighborhood are you looking for?
- Why are you moving?
- By when do you need to move?

**Example:**  
We are a family of 4 looking for a 3-bedroom home in a quiet area in the North Hills of Pittsburgh. We are moving so my kids have the chance to attend a high-performing school. We have a Housing Choice Voucher with the Allegheny County Housing Authority, and we are looking to move by January 1, 2023.

**ABOUT ME** | Provide a bit more information about you and your household so the property owner can get a sense of who you are.

## Financial Assistance and Reimbursement Request Form

Housing Mobility Toolkit: Client Binder

### Financial Assistance [Update based on final program parameters]

The Housing Mobility Program can help you pay for many costs associated with moving into an Opportunity Area Unit. Use this information to request a reimbursement for an expense that you already paid.

If you have not paid this expense, simply reach out to your Coach. In most cases, they can pay the fee directly on your behalf.

Use the Financial Assistance Reimbursement Request form in this section to make a request for a reimbursement.

#### Flexible moving-related expenses:

Fee	Definition	Required documentation for reimbursement
<b>Application Fee</b>	A fee that is paid when you put in an application. It covers the cost of a background check.	<b>Receipt:</b> screenshot, email, or written receipt with date, your name, unit address, and cost of the fee.
<b>Administrative or Processing Fee</b>	A fee that may be required along with an application to cover costs of processing the application.	<b>Receipt:</b> screenshot, email, or written receipt with date, your name, unit address, and cost of the fee.
<b>Bus or train pass to tour units</b>	The cost of admission for using public transportation to go see a unit	<b>Not applicable:</b> Your Coach or the Leasing Coordinator will supply you with these.
<b>Utility Arrears or Deposit</b>	Overdue bills or deposit for a utility that is required to be paid prior to establishing services at a new property	<b>Overdue bill or notice:</b> screenshot, email, or written receipt with date, your name, unit address, and the amount.
<b>Renter's Insurance</b>	Insurance policy required by your lease to cover your belongings at your rental property.	<b>Receipt and copy of lease:</b> screenshot, email, or written receipt with date, your name, unit address, and cost of fee. Copy of lease indicating that Renter's Insurance is required.

#### Holding fee and security deposit:

Fee	Definition	Required documentation for reimbursement	Maximum paid by program
<b>Holding Fee</b>	A fee paid to the owner after your application has been selected so the owner will hold the unit for you. The holding fee is then reimbursed to you or goes towards your deposit after the	<b>Receipt:</b> screenshot, email, or written receipt with date, your name, unit address, and cost of the fee. <b>Holding Fee Agreement signed by</b>	Up to half the monthly rent

# Addressing Discrimination in the Rental Market

Housing Mobility Toolkit: Client Binder

Addressing Discrimination in the Rental Market [update to reflect protected classes based applicable local and state law and the contact information of local nonprofits that fight housing discrimination]

It is illegal for property owners or property managers to deny you the opportunity to apply for housing based on...

...your race	...your sex	...your age (40+)
...your old (3+ years) criminal record	...your religion	...your marital status
...your physical or mental abilities	...your national origin	...your number of children
...your gender identity	...your ancestry	...your color
...your sexual orientation	...your military status	...your source of income

\*These criteria are based on federal fair housing law as well as Pennsylvania State and City of Pittsburgh laws

Property owners cannot deny your application or require you to go through an additional screening they do not require for all applicants based on any of the above characteristics.

For example, if someone says to you...

"We don't take Section 8"

"I only allow up to two kids in my properties"

"I am only looking for female tenants"

"I require a home visit for Section 8 applicants"

...You may be experiencing discrimination. If you feel you have been discriminated against illegally, there is help.

### Non-profits that offer free legal advice and preparation to file a complaint:

Community Justice Project (412) 434-6002 <a href="https://www.communityjusticeproject.org/">https://www.communityjusticeproject.org/</a>	Neighborhood Legal Services (866) 761-6572 <a href="https://www.nlsa.us/">https://www.nlsa.us/</a>
Fair Housing Partnership (412) 391-25635 <a href="https://fhp.org/">https://fhp.org/</a>	

PROGRAM MANUAL  
ATTACHMENTS:

Client Binder<sub>7</sub>

# RFTA Cover Letter

Housing Mobility Toolkit: Client Binder

RFTA Cover Letter [Update based on final program parameters]

September 6, 2023

Subject: Leasing up with a Housing Mobility Program Tenant

To whom it may concern:

[NAME] participates in the Housing Mobility Program. The Housing Mobility Program works in close partnership with the housing authorities in the [region name] region to connect families with vouchers to property owners with quality housing in Opportunity Areas in our region.

As a property owner leasing up with a tenant in the Housing Mobility Program, there are many benefits:

- Your new tenant has received pre-move coaching and worked hard to prepare for this move.
- You will receive a lease Lease-up Bonus of a half month's rent upon lease-up.
- You will receive expedited processing of the attached Request for Tenancy Approval (RFTA) paperwork and an inspection will be scheduled very soon after receipt of this RFTA.
- Access to a Damage Mitigation Fund in the unlikely event that your tenant damages the unit.

Please do not remove this cover sheet from the RFTA paperwork as it serves as a notice to the Housing Authority that you are an owner working with the Housing Mobility Program.

Additionally, please do not hesitate to contact me if you have any questions or concerns, or if you would like assistance in completing the attached RFTA documents.

Thank you,

[Name]  
Leasing Coordinator  
Housing Mobility Program  
[Housing Authority]



# Holding Fee Agreement

Housing Mobility Toolkit: Client Binder

## Holding Fee Agreement

[Update based on final program parameters and after review by legal counsel to ensure it is in compliance with all applicable state and local laws]. As an act of good faith, the Housing Mobility Program will pay an upfront holding fee of up to half the security deposit to property owners who have accepted the application of a Housing Mobility Program tenant for an Opportunity Area unit while the unit undergoes inspection and paperwork processing. Holding Fees are then credited towards the tenant's security deposit.

Property Owner or Manager's Name:	Tenant's Name:	Tenant Number (staff only):

**Property Information:**

Address line 1:	Address line 2:
City, State:	ZIP Code:

Monthly rent amount:	Security deposit amount:	Holding fee amount requested:

**This agreement outlines the terms of the holding fee. Please initial each statement:**

\_\_\_ A holding fee may only be used toward an Opportunity Area unit. Not sure if your unit is in an Opportunity Area? Check here: [insert link](#)

\_\_\_ The holding fee is only provided after the owner accepts a client's application for the unit.

\_\_\_ The holding fee must be returned to the Housing Mobility Program if for any reason the owner chooses not to lease up with a tenant. Reasons include, but are not limited to: refusing to make required repairs to pass the unit inspection or choosing a different applicant.

\_\_\_ Property owners who receive a holding fee but then choose not to sign a lease with the prospective tenant must return the holding fee to the Housing Mobility Program within 30 days.

\_\_\_ After the lease has been executed, the holding fee must be credited towards the tenant's deposit.

**Payee Information:**

Name:	
Address line 1:	Address line 2:
City, State:	ZIP Code:

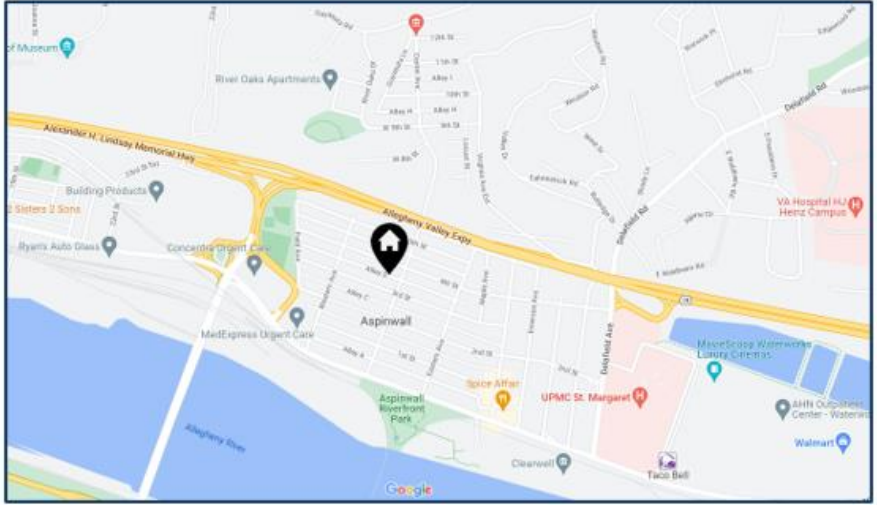
# Post-Move Welcome Packet

Housing Mobility Toolkit: Client Binder

## Welcome Packet

[These are developed individually by neighborhood and provided to the family after their move to the new area].

### Welcome to Your New Neighborhood!



**Highlights of your new home & neighborhood:**

- Nationally recognized, award-winning Fox Chapel Area School District
- Plenty of shopping and amenities nearby
- Access to the waterfront at Allegheny River Trail Park
- Backyard space for the kids to run around

PROGRAM MANUAL  
ATTACHMENTS:

Client Binder<sub>8</sub>

## Post-move Frequently Asked Questions

Housing Mobility Toolkit: Client Binder

### Post-move Frequently Asked Questions

**1. When will I hear from the Housing Mobility Program next?**

We will call you about 9 months after you have moved in to your current property to see if you are thinking you will stay at your current place, or if you want to move again.

**2. Who do I call if I need to get in touch with the Housing Authority?**

Contact your primary caseworker. If, after several attempts over several days you are unable to reach them, feel free to contact a Housing Mobility Program staff member to assist you.

**3. What do I do if I have a maintenance issue?**

Contact your property owner. If you are not sure how to contact your owner, look at your lease. In most cases, you and your property owner should have already discussed how they want to be reached. If you are not sure, take a look at your lease or other move-in information from your property owner.

In an emergency situation: Contact the property owner as soon as possible. Some management companies have emergency numbers you can call after hours.

Examples of emergency situations may include:

- Flooding
- Water leaking from a roof or ceiling
- Gas smells
- Sparks flying from an outlet
- An exterior door that no longer locks, which makes your unit unsecure

Emergency maintenance issues should be fixed within 24 hours after being reported. If your emergency maintenance issue has not been fixed within 24 hours, call the Inspections Department at [insert number]. If you are worried your owner will not make the repair within 24 hours, you may also call the Inspections Department.

In a non-emergency situation: Contact the property owner during regular business hours, 8am to 5pm. The typical time for fixing a non-emergency repair is 1 week after being reported. Some repairs take longer than others to fix. Your owner should be taking steps to make the repair within 1 week.

If your property owner is not making timely repairs and you need assistance, call your Coach or your primary Housing Authority Caseworker.

**4. What do I do if my income changes?**

[Describe the policies and processes associated with an income change, including when a family must report an income change and the timeline for making the update.]

PROGRAM MANUAL  
ATTACHMENTS:

# Affordability Calculator

- **Baseline tab:** Update geographic boundaries of payment standard areas
- **Family budget tab:** Update geographic boundaries of payment standard areas and average utility allowance by bedroom size
- **Affordability 2023:** List of affordability by payment standard area and voucher bedroom size, calculated by subtracting the average utility allowance from the payment standard
- **Payment standards 2023:** Payment standard schedule
- **A full list instructions to update and instructional video is available on the “updating this file” tab**

# Workshop Materials

- Housing Search Workshop
  - Housing Search Workshop (PPT)
  - Housing Search Workshop Facilitator Guide (Word)
  - Housing Search Workshop Group Activities (Word)
  - Housing Search Workshop Participant Booklet (Word)
- Money Management Workshop Materials
  - Money Management Workshop (PPT)
  - Money Management Facilitator Guide (Word)
  - Money Management Workshop Participant Booklet (Word)
- Renter's Workshop Materials
  - Renter's Workshop (PPT)
  - Renter's Workshop Facilitator Guide (Word)
  - Renter's Workshop Quizipop (PPT)
  - Renter's Workshop Participant Booklet (Word)
  - Quizipop Instructions (Word)

WORKSHOP MATERIALS:

# Housing Search Workshop

- How to use the Address Locator Tool
- Geographic payment standard area
- Local and state housing law
- Group activity examples
- Popular housing search engines for the region

WORKSHOP MATERIALS:

# Renter's Workshop

- PHA-specific policies and procedures
- Local and state housing law
- Available resources in the region

WORKSHOP MATERIALS:

# Money Management

- Regional average cost to move
- Local resources to furnish a home
- Methods for paying local utilities
- Information for the financial coaching referral partner
- How to update income at the PHA(s)



Closing



# Previous Webinars on the Housing Mobility Toolkit

- Introduction to the Housing Mobility Toolkit, 4/26
- Program Overview, 6/27
- Program Setup, 8/1
- Program Framework, 8/15
- Find past trainings on HUD's training on HCV webpage:  
[https://www.hud.gov/program\\_offices/public\\_indian\\_housing/programs/hcv/program\\_trainings\\_and\\_resources/previous](https://www.hud.gov/program_offices/public_indian_housing/programs/hcv/program_trainings_and_resources/previous)

# Stay Informed

- HUD's webpage on Housing Mobility:  
[https://www.hud.gov/program\\_offices/public\\_indian\\_housing/programs/hcv/housingmobility](https://www.hud.gov/program_offices/public_indian_housing/programs/hcv/housingmobility)
- HUD's webpage on HCV Trainings:  
[https://www.hud.gov/program\\_offices/public\\_indian\\_housing/programs/hcv/program\\_trainings\\_and\\_resources](https://www.hud.gov/program_offices/public_indian_housing/programs/hcv/program_trainings_and_resources)
- Sign up for the HCV Connect Newsletter:  
<https://public.govdelivery.com/accounts/USHUDPIH/signup/28268>



# Questions?

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