

T0: Personnel Board

FROM: Sarah Olson, Human Resources

SUBJECT: Housing Assistance Clerk 1 & 2 – CDA Housing Operations Unit

DATE: September 11, 2017

At the request of the Interim Housing Operations Unit Director Tom Conrad, a study was conducted of the Housing Assistance Clerk 1 (Compensation Group 20, Range 11), held by S. Davis, B. Elder, B. Louis and A. Rahn and the Housing Assistance Clerk 2 (Compensation Group 20, Range 12), held by S. Clayborne. In addition, I studied the proposal for a new classification of Housing Assistance Clerk 3. The proposal for a classification series of Housing Assistance Clerk 1-3 is a result of these positions taking on more advanced level programmatic support related to the Section 8 Voucher programs. After reviewing the duties and responsibilities associated with these positions, as seen in the attached position descriptions, and my meetings with Mr. Conrad and the incumbents, I make the following recommendations for the reasons outlined in this memo:

- Create a new classification titled Housing Specialist 1 with placement in CG 20, Range 11. The title of Housing Specialist is in line with HUD industry standards.
- Create a new classification titled Housing Specialist 2 with placement in CG 20, Range 13.
- Create a new classification title Housing Specialist 3 with placement in CG 20, Range 14.
- Delete the classification of Housing Assistance Clerk 1 currently placed in CG 20, Range 11.
- Delete the classification of Housing Assistance Clerk 2 currently placed in CG 20, Range 12.
- Recreate position #4412, #1031, #3925, #3801 (currently occupied by S. Davis, B. Elder, B. Louis and A. Rahn, respectively), as a Housing Specialist 2 and reallocate the incumbents to the new positions.
- Recreate position #1025 (currently occupied by S. Clayborne) as a Housing Specialist 3 and reallocate the incumbent to the new position.

Currently, the Housing Assistance Clerks schedule and conduct orientations to advise potential clients of program requirements, rights and obligations. They process program applications and recertifications to determine eligibility (in conformance with Federal Section 8 program requirements). They interview program applicants and participants to gather relevant information, accept or reject program applications and terminate program participants for cause for a caseload of clients for Section 8 housing and for clients in their respective Section 8 special voucher programs. The Housing Assistance Clerks work with a host of community partners regarding their clients housing status including but not limited to Landlords, Police, Legal aides, Social Workers, Advocates and Doctors.

The proposed Housing Specialist 1-3 class specification identifies the work as:

... responsible paraprofessional work in the CDA Housing Operations Division. The work involves the primary day-to-day responsibility to perform technical administrative assistance in the delivery of rent services and caseload management duties as related to the administration of the Section 8 Housing Choice Voucher Program, regulated by the Department of Housing and Urban Development. Employees in this position work independently, coordinate many projects and work as a member of the Housing Operations Central Office staff. The work involves the exercise of judgment, discretion and initiative in performing specific, on-going program support activity involving determination of initial and continued eligibility, maintaining accurate and efficient case files and confidentiality of client information.

Mr. Conrad requested the creation of a series of classifications to allow for career progression as an incumbent gains knowledge, expertise and a Section 8 Voucher program to manage. Currently, the structure of the Housing Assistance Clerk 1-2 series reserves the second level for the leadworker of the unit.

The new series would be structured as follows: As a Housing Specialist 1, an individual could be hired who has a Bachelor's Degree and no experience OR at least three years of administrative and clerical experience which involved some independent responsibility for an office function with involved significant interaction with the public, and interpretation/application of governing standards. An incumbent at this level would work closely with the Housing Specialist 3 and the Housing Assistance Program Supervisor to learn the work of the agency. Incumbents of the Housing Specialist 2 would work under general supervision and perform all of the work of the Housing Specialist 1, and in addition, monitor, analyze, and manage a Section 8 Voucher program. Such Section 8 programs include Family Self-Sufficiency, Family Unification, VASH, Home ownership and Portability. Finally, as a Housing Specialist 3, an incumbent would work under general supervision performing all of the work of the Housing Specialist 2, as well as provide leadership to the unit and perform complex and advanced level administrative assistance to Section 8 caseload and voucher programs.

It is expected that an incumbent would spend approximately 2 years at level 1 and have taken on the oversight of at least one Section 8 Voucher program before moving to the next level. Movement to the 3 level would not be automatic but would be dependent on department needs and would be the result of a position study or competition. It is intended that there would only be one incumbent at the 3 level, but all other employees in the unit would be able to advance to the 2 level.

The Housing Specialist 1 position description did not result in any changes, therefore, I recommend its placement to remain in CG 20, Range 11. The placement of the level 2 and 3 in Ranges 13 and 14, respectively, is a recommendation following an analysis of an increase in the following factors: technical knowledge, specialized knowledge, specialized training related to the position, programmatic authority, decisional impact, policy interpretation, and autonomy.

The addition of a classification of Housing Specialist 2 reflects the advanced level technical and specialized knowledge in the administrative assistance in the delivery of rent services and caseload management duties as related to the Section 8 Housing Choice Voucher Program. New programs have been added to the Section 8 Voucher Program requiring a higher level of responsibility for managing relationships with outside partners and assisting the Program Supervisor in developing, monitoring and analyzing the new programs and relationships. Each incumbent has taken on a Section 8 program to support in addition to their Section 8 caseload. The Housing Specialist 2 is expected to work independently, and understand and interpret HUD regulations in respect to their Section 8 program. In addition, each Housing Specialist is required to obtain the Section 8 Choice Voucher Certification, which requires a week of training and the passing of the exam. In reviewing other classifications within the City to determine the appropriate range, it's important to look within the agency for comparable positions.

CDA Housing Operations is comprised of three sections: Admissions & Eligibility, Section 8 Programs, and Low Rent-Public Housing. Under the Admissions & Eligibility section, there are two incumbents classified as a Program Assistant 2, (CG 20, Range 12). These two positions must clearly understand, interpret, and implement Federal Housing and Urban Development (HUD) mandates and Community Development Authority (CDA) policy requirements. Duties require independent judgment in making final eligibility determinations, to include performing a detailed analysis of applicant information, consistency in application, and ensuring that decisions meet program needs and requirements. They manage and maintain multiple program waiting lists. In addition, due to the new Section 8 Voucher Programs, these involve the creation and management of many new program admission and eligibility processes, as well as new waiting lists. Changes also involve learning several different federal and IRS regulations. They will also meet with applicants to advise them of their housing eligibility status.

Some of the above duties are comparable to the Housing Specialists but there are significant differences which warrant a difference in salary range: The work of the Housing Specialists requires the exercise of considerable judgment and discretion in performing highly specialized program administration functions as it relates to the Section 8 Voucher Programs. A Housing Specialist will meet with on average about 325 clients for their annual recertification for a housing subsidy. In addition to calculating each client's housing subsidy and the preparation of contracts, they are contacted regarding any qualifying event changes during the year. The Eligibility Program Assistant 2's meet with clients at the time of Housing eligibility determination whereas the Housing Specialists meet with clients on an annual basis at minimum, with some clients much more frequently regarding any changes to their housing situation. The contact with clients is much more frequent and involved at the Housing Specialist level.

Also, each Housing Specialist is managing a Special Program which requires meeting with each individual one-on-one to go over the program rules and how to maintain the voucher. Each Housing Specialist hosts weekly walk-in hours for clients dealing with housing issues or questions. As the contact for Housing questions, clients often are explaining life circumstances and situations to the Housing Specialists so the Housing Specialist may properly identify which Housing Program voucher will meet their needs and where to refer them to community resources to get further

support. While Housing Specialists are not expected nor encouraged to act as Case Manager for the customer, often Housing Specialists are providing advice and coaching and working with a wide variety of community partners including Landlords, Police, Legal aides, Social Workers, Advocates and Doctors. As circumstances and situations evolve and change for a client, the Housing Specialist is expected to meet with them and ensure they still meet program requirements and also refer clients to others in the community that can be of assistance. The eligibility Program Assistant 2's are not meeting with clients on an on-going regular basis referring to external partners for further assistance. It's also very common for the Housing Specialists to have numerous calls from community partners regarding the status of their clients. The Eligibility Program Assistant 2's are not receiving and making calls to community partners regarding clients on an ongoing basis. The specialized knowledge and decisional impact in these situations are of a higher degree to ensure that clients are in the appropriate housing program and have referrals to appropriate outside agencies that can help them with any further needs. In many of these cases, clients are contacting Housing Specialists out of urgency and in crisis mode, and must disclose many details of their situation to the Housing Specialists. Housing Specialists need to be prepared, knowledgeable, aware of HUD regulations and experts in their Section 8 special voucher program. For those reasons, I found the Housing Specialist 2 to be comparable with a Program Assistant 3 (CG 20, Range 13) classification and justifiable to be one range higher than the Eligibility Program Assistant 2's.

The Program Assistant 3 classification indicates

**...highly responsible advanced-level programmatic administrative support work in a department, division, or other independent program unit.** Employees in this class typically function as office managers responsible for the coordination of all clerical and administrative support including the supervision of large clerical support staffs (5-8 employees), as well as serving as assistant/secretary to the program head. **The work requires the exercise of considerable judgment and discretion in the performance, coordination, and/or supervision of a wide variety of administrative support and special activities relating to the unit's programs and functions. The work involves developing operating policies, systems, and procedures; performing and/or overseeing the performance of all administrative support functions; and being responsible for a number of specific program components and/or special projects on an on-going basis. The work at this level requires specialized and/or in-depth program knowledge, independent decision-making and justification, and responsibility for specific policy and procedure development and communication. (NOTE: Substantial specialized program responsibilities which occupy a significant amount of a position's time, may be substituted for another major function such as supervision of a large staff.)** Employees in this class work under the general supervision of the department, division, or program head. **[Emphasis added]**

Given the leadership component of the Housing Specialist 3, I recommend the placement to remain at least one range higher than the Housing Specialist 2 and in a comparable classification to Administrative Assistant. Given that each Housing Assistance Clerk 1 is assigned and managing a special program, and the Housing Assistance Clerk 2 continues to provide leadership support over the unit, my recommendation is to reallocate the incumbents to the level 2 and the leadworker to the level 3.

The necessary resolution to implement this recommendation has been drafted.

Editor's Note:

| Compensation Group/Range | 2017 Annual Minimum (Step 1) | 2017 Annual Maximum (Step 5) | 2017 Annual Maximum +12% longevity |
|--------------------------|------------------------------|------------------------------|------------------------------------|
| 20/11                    | \$46,454                     | \$51,998                     | \$58,238                           |
| 20/12                    | \$47,598                     | \$53,378                     | \$59,783                           |
| 20/13                    | \$49,233                     | \$54,896                     | \$61,483                           |
| 20/14                    | \$50,614                     | \$56,142                     | \$62,879                           |

cc: Tom Conrad—Interim Housing Operations Director  
Natalie Erdman—Director of Planning, Community & Economic Development  
Greg Leifer—Employee and Labor Relations Manager