

The National Summit on Performance Measurements and Partnership Strategies for Public Housing

Enhance Operations and Improve Services in Public Housing through Performance Measurement and Partnership Strategies

Best Practices, Management Systems, and Cutting-edge Strategies for Improving the Management of Public Housing Agencies

- **Performance Measurements** for tracking and improving physical and financial conditions of housing programs and motivating employees and partners
- **Partnerships, Contracting and Outsourcing Strategies** to forge effective performance agreements with non-profits and for-profits to carry-out functions and deliver essential services in public housing
- **Improving and Reporting Financial Solvency** through new financial measurements and information technology

PLUS! Public Housing Assessment System: Compliance and Implementation Tips for tackling the latest wave of accountability initiatives

Performance Measures for:

- ✓ Physical conditions
- ✓ Resident Services
- ✓ Financial Solvency
- ✓ Security
- ✓ Welfare-to-Work
- ✓ Maintenance
- ✓ Utilities
- ✓ Service Contracts
- ✓ Management Systems
- ✓ Quality of Life
- ✓ Regulatory Compliance

...and many other areas

Best Practices for Public Housing from:

- ✓ U.S. Department of Housing and Urban Development
- ✓ National Academy of Public Administration
- ✓ U.S. House of Representatives
- ✓ Minneapolis Housing Agency
- ✓ Montgomery County Housing Agency
- ✓ Philadelphia Housing Agency
- ✓ Norfolk Housing Authority
- ✓ Public Housing Authorities Directors Association
- ✓ Council of Large Public Housing Authorities
- ✓ National Organization of African Americans in Housing
- ✓ Local Initiatives Support Corporation
- ✓ Reno Housing Authority
- ✓ Moody's Investor Service
- ✓ Standard and Poors
- ✓ National Association of Housing Redevelopment Officials

Presented by:
The Performance Institute

October 4-6, 2000
Washington Plaza Hotel
Washington, DC

"Tap into the best Performance-Enhancement Strategies in Public Housing"

Measures that Make a Difference
Partnerships that Produce Results

Who Should Attend?

Anyone interested in improving the performance of our nation's public housing, including:

- Public Housing Authority Managers
- For-profit housing service providers
- Community leaders
- Non-profit social welfare organizations
- Housing Inspectors and Regulators
- Federal and State Government Officials

MEASURE the impact of your programs to track results through intermediate outcome and end outcome performance measures

MOTIVATE employees and program partners to improve performance of services and operations

INNOVATE the operation of public housing by implementing best practices from across the nation

PARTNER to produce improved results and decrease costs by leveraging the participation of non-profits and for-profits in public housing administration

COMPLY with new performance measurement and reporting requirements, including the Public Housing Assessment System

Our Mission:

The Performance Institute is a resource for public, private and non-profit organizations seeking to improve their performance through strategic management and performance measurement. Offering timely conferences, training, research and consulting, the Institute positions itself as a "solutions center" for executives and managers seeking assistance, cutting-edge research, best practice analysis and "next step" advice on organizational design, change and renewal. For Continuing Education on a variety of issues, visit our website at www.PerformanceWeb.org

Dear Public Housing Professional:

You are invited to explore the latest best practices, lessons learned and cutting edge ideas from leading public housing experts at the *National Summit on Performance Measurements and Partnership Strategies in Public Housing*, being held October 4-6 in Washington, DC. From new accountability mandates and the Public Housing Assessment System to internal initiatives to enhance performance, public housing authorities all across the nation are improving their measurement, monitoring and reporting of physical and financial conditions, as well as partnering to produce improved services for their residents.

Measuring and Improving Physical and Financial Conditions

You shouldn't be overwhelmed by the latest accountability mandates to improve physical and financial conditions in public housing. Focus on performance measurements that will actually lead to improved services for residents. You will emerge from this conference equipped with practical performance measures that will lead to substantial improvements in a variety of public housing operational areas.

Cutting Edge Performance Measures from Leading Organizations

What measures are best for your organization? Government executives, nonprofit leaders, private-sector assessment entities and local housing authorities will discuss their vision of the future of performance measures as well as offer their strategic and tactical tips for implementation. This national summit will:

- Examine the debate over what performance measures to use and spotlight proven "best practices" that are responsible for real improvements
- Explore implementation approaches that balance the need for performance reporting with making progress in day-to-day management challenges
- Equip you with practical skills for implementing performance measures, collecting and reporting data, and using measures to motivate partners and stimulate program improvements.

Performance-Oriented Partnership Strategies with Non-Profits and For-Profits

Our expert speaking faculty will present innovative partnership solutions to the everyday problems you face in public housing. Discover how partnerships for non-profits can help your agency tackle long-standing socio-economic issues of your residents and learn to leverage private sector evaluations and services for enhancing the day-to-day operations of your units.

Performance measurements and partnership strategies can be a vitally important asset for improving internal conditions in public housing and building external trust and confidence. This conference provides you with a one-stop resource for designing and developing a set of metrics geared to maximize the performance of your housing authority, as well as forging the partnerships necessary for improving your operations. Don't delay, call 703-519-6270 to register for this important conference.

Sincerely,

Ed Joseph

Edward Joseph
Director
The Performance Institute

Enhance Operations and Improve Service

Top Ten Reasons to Attend the National Summit on Performance Measurements and Partnership Strategies in Public Housing!

1. Take an active role in the dialogue on performance measures in public housing and participate with major policy decision makers on measuring and improving the performance of public housing.
2. Gain a better understanding of the future of performance measures in the federal government, HUD, the public housing community at large.
3. Improve strategic planning, operational planning and management, and performance measurement and reporting practices at your organization.
4. Gain external trust by developing internal and external evaluation strategies, as well as communicating your success stories to the public.
5. Explore expert systems to improve physical property management.
6. Achieve performance-based contracts in your organization.
7. Discover how information technology is bringing the public housing community closer together and enhancing the exchange of performance information
8. Secure necessary resources by learning techniques and tools to maximize funding.
9. Expand your knowledge as colleagues share their best practices in management and improving resident services.
10. Forge partnerships with for-profit and non-profit organizations that result in improved services and enhanced operations.

DAY ONE: October 4, 2000

Measuring Performance

7:30 **Registration and Continental Breakfast**

8:30 **Measuring and Improving Public Housing Programs: The HUD Vision**

In this keynote address, hear how HUD intends to devise, implement, evaluate, and collect data for national performance measurements for public housing outcomes. This presentation will define HUD's vision of the role of public housing as a key service to help the nation's communities meet their development needs, spur economic growth in distressed neighborhoods, provide housing assistance for the poor, help rehabilitate and develop moderate and low-cost housing, and enforce the nation's fair housing laws. Hear what lessons have been learned so far, and what initiatives are coming up on performance and partnership issues.

Karen Newton
Director of the Troubled Agency Recovery Center
U.S. Dept. of Housing and Urban Development

9:15 **A Vision of Public Housing—Performance and Partnerships for Results**

Under the Quality Housing and Work Responsibility Act of 1998, Congress asked the National Academy of Public Administration to examine the Public Housing Assessment System (PHAS). In this presentation, a key architect of that initiative will discuss some of the areas examined by the NAPA's study as well as offer insights on future directions in developing and using performance measures in public housing.

Dr. Bruce McDowell
National Academy of Public Administration

10:00 **The Congressional View of Performance Measurements and Partnership Strategies for Public Housing**

Where does Congress intend to go with performance measurement and partnerships in public housing? Will Congress pay attention to performance information in resource allocation and adjusting public housing programs at the national level? In this key session, hear from veteran Hill staff on the political landscape facing public housing and their views on performance measurements and partnership arrangements.

Joe Ventrone
Staff Director, Subcommittee on Housing and Community Opportunity
House Banking and Financial Services Committee

Marcia Kuntz
Rep. Barney Frank, House Banking and Financial Services Committee
Subcommittee on Housing and Community Opportunity

10:45 **Break and Refreshments**

11:00 **Leadership Panel: Views from Advocacy Organizations—Key Perspectives, Issues, and Practices for Improving the Performance of Public Housing**

In this interactive session, leaders representing the public housing community come together to debate the evolution of performance measurements and partnership arrangements in public housing:

- What challenges do the housing authorities face with the implementation of performance measures?
- Are the current performance measures objective, uniform and verifiable?
- What is an appropriate level of accountability?
- How can partnerships be forged in mutually-beneficial ways?

Paul Messenger
Public Housing Authority Directors Association
Julio Barreto
National Association of Housing and Redevelopment Officials
Deb Gross
Council of Large Public Housing Authorities
Kevin Marchman
National Organization of African Americans in Housing

12:00 **Networking Luncheon**

1:15 **Linking Measures to Management: New Dimensions in Measuring Performance in Public Housing**

Independent third-party evaluations are becoming a powerful decision-making tool for public housing authorities. In this session, hear from the primary independent evaluation organizations in public housing. You'll emerge with keen insight on:

- What performance measurements these organizations are using in their evaluation systems and how to improve your standing under their evaluation criteria
- Best practice performance measurements that combine financial and physical issues
- How to best use the full spectrum of services available from the private sector that assist with evaluation of an agency's current condition and services
- Developing strategic plans and staying on track to manage change within public housing organizations

Wendy Dolber
Standard and Poor's
Portia Lee
Moody's Investor Service
Richard Gentry
Local Initiatives Support Corporation

2:30 **Break**

2:45 **Measuring Physical Conditions: Case Study on Philadelphia's Site-Management System**

Hear from Director of the Philadelphia Housing Authority on their Site-Management System—an award-winning computer system designed to enhance the responsiveness and performance of the Authority's management of physical operations. In this session you will explore a wide-range of performance measurements and innovative strategies for improving physical conditions in public housing.

Carl Green
Philadelphia Housing Authority

3:45 **Measuring Performance with Technology and Submission of Electronic Data**

Information technology is being used in every facet of life to enhance communication and coordination and facilitate the exchange of ideas. Public housing is just now starting to tap into the power of information technology. In this session, hear how HUD is revolutionizing the way it communicates with its customers with the new Public and Indian Housing Information Center (PIC). Learn some of the lessons-learned from applying e-commerce tools to public housing, as well as how your housing agency can report and access performance information using the PIC system.

Johnson Abraham
U.S. Department of Housing and Urban Development

4:45 **Adjourn**

DAY TWO: October 5, 2000

Performance Strategies and Partnering for Results

8:30 **Measuring and Improving Financial Conditions at Public Housing Authorities**

"No measures, no money." Financial solvency and integrity in public housing will always be a paramount issue. In most cases, not having adequate financial controls and accountability standards in place can cause significant turmoil for a housing agency, and lead to external intervention. Over the past 15 years, a number of lessons have been learned and best practices pioneered for improving financial conditions at public housing agencies. In this presentation, hear from a veteran expert in measuring and improving financial conditions in public housing on important performance indicators to use and essential financing options to pursue for your agency.

Frederick C. Lamont
Frederick C. Lamont, CPA

9:30 **Innovations in Improving Quality of Life: The Diggstown Case Study**

Diggstown's success began with a new urbanism design strategy to blend public housing with the surrounding community. Through community support and the right balance of resident support services, residents in Diggstown consistently achieve self-sufficiency and better their lives. Through this case study you will learn about the:

- Effects of architectural design on the attitudes of residents and their quality of life
- Techniques used to implement this program, their cost to the housing authority, and the dramatic benefits being produced for the residents
- Empowerment of residents through brokering of needed funds from business community via Tenant Management Corporation model

Bertrand Robinson
Lucy Major
Norfolk Housing and Redevelopment Authority

10:15 **Break**

10:30 **Best Practices in Public Housing Management: Energy Conservation and Assisted Living**

A housing expert from Minneapolis will present a briefing on the objectives, implementation strategies, lessons-learned, and next steps for two nationally recognized programs. Learn the how to's of creating an energy conservation program that enhances living conditions for residents, provides positive environmental impact and achieves significant annual cost savings. Take advantage of HUD's Energy Savings Contract Opportunities. Install new systems entirely paid for through cost savings. Explore an innovate approach to assisted living in public housing, where assisted living is incorporated into the existing structures, instead of dedicating an assisted living building. Under this model residents do not have to move to receive services, if services are only temporary. They do not have to move to curtail services. Because services are slotted there is no disruption in PHA leasing and occupancy actions due to waiting for filling a unit that can only be used for Assisted Living.

Bob Boyd
Director of Special Projects
Minneapolis Housing Authority

11:45 **Networking Luncheon**

1:00 **Forging Effective Partnerships for Results in Public Housing: Contracting, Outsourcing and Privatization Options**

Hear from an expert panel on the issues key to forging partnerships in public housing, with primary emphasis on:

- Key strategies and critical success factors for crafting public-private partnerships
- Leveraging your relationships with outside organization to create new, affordable housing in your locality
- Balancing and mixing the competencies of non-profit, for-profit and government players in public housing

Richard Norment,
National Council for Public-Private Partnerships

Patrick Maier
Montgomery County Housing Opportunities Commission

2:00 **Partnering with Local Businesses and Non-Profit Organizations: The Youth Entrepreneurial Program**

Tackling tough social issues that come along with working in public housing is not an easy task. It requires new approaches, creative thinking, and innovative partnerships. Norfolk's award-winning Youth Executive Council that has done all three! Learn how this training program fosters leadership skills that are relevant to both school and home life.

- Youth Executive Council reaffirms values and responsibilities of public housing youth using networks that reach neighborhoods throughout Norfolk.
- The Council's nonprofit work earns funding for youth and community programs, as well as scholarships.
- Programs that involve youth of all ages in your programs.

Jackie Baker
Norfolk Housing and Redevelopment Authority

Measurement and Partnership Strategies

2:50 **Break**

3:00 **Partnering and Outsourcing to Non-Profits**

- Key opportunities for involving non-profits in the management of public housing agencies
- Do's and Don'ts of crafting partnerships for management functions

David Morton
Reno Housing Authority

3:30 **Break**

3:45 **Partnering and Outsourcing to For-Profits**

This session will present case studies of cities that have chosen the alternative of private management for their public housing needs, focusing primarily on:

- What are the advantages of private management?
- Has private management resulted in improved delivery of services?
- What trends and best practices are emerging?
- How to structure the contract in the most effective way to provide for accountability for superior performance?

Greg Burn
Former Executive Director, Dade County Housing Authority
Steve Herwaldt
Abt Associates

4:30 **Adjourn**

This event will be held at the Washington Plaza Hotel in Washington, D.C. A limited number of rooms at government per diem rate have been reserved at the conference center. Please call 1-800-424-1140 or 202-842-1300 to reserve a room. Please reference group code 9492. For any other questions, comments or concerns regarding this program, please contact The Performance Institute at 703-519-6270.

DAY THREE: October 6, 2000

Application Workshops

8:30-11:30 **Choose Session A or B**

Session A: Designing Performance Measurements for Public Housing

Selecting performance measurements for your organization is not an easy task. Measures that work in one organization may not be appropriate for another. In this application workshop, you will spend time with a performance measurement expert and have opportunities to directly apply performance measurements to your specific organizational challenges. You will emerge with the skills to devise performance measures that track outputs, intermediate outcomes, and end-outcomes for a number of key outcomes in public housing. You will also be equipped with a number of activity and process-measures critical to the successful operation of public housing agencies.

Edward Joseph
The Performance Institute

8:30-11:30 **Session B: Performance-Based Contracting for Public Housing Services**

Crafting and managing performance-based contracts for key public housing services is an emerging device being used successfully by many public housing authorities. In this application workshop, you will explore the critical dimensions of a performance-based contract, from crafting a clear statement of work to ensuring that performance expectations are communicated and performance targets set. You will emerge from this workshop prepared to develop a results oriented approach to contract management as well as with the skills to manage contracts for results at each stage of the contract management process.

Dr. Allan Burman
President, Jefferson Solutions

"One of the best in the area of outcomes and performance measures. Directly related to my job, using clear program examples."
— Kim Jennings, Environmental Protection Agency

"Excellent speakers. Presented several ideas, concepts and performance measures that I will use in my programs to focus on results."
— Tara Fochesato, Center for Civic Leadership

"Practical and up-to-date; well presented with great content."
— Von E. Nebbitt, St. Louis Housing Authority

Performance Measurements and Partnership Strategies for Public Housing Registration Form

Call (703) 519-6270; Fax This Form To: (703) 519-6271; or visit www.PerformanceWeb.org

☐ Yes! register me for the Summit at the standard tuition rate of $995.

☐ Yes, register me for the Summit AND an application workshop on Day Three for $1295 A B *(circle one)*

☐ Please call me. I am interested in a special Group Discount for me and my team.

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The National Summit on Performance Measurements and Partnership Strategies for Public Housing
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