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UNITED STATES HOUSING AUTHORITY

BULLETIN NO. 22 ON POLICY AND PROCEDURE

INITIAL STEPS IN TENANT SELECTION

Addendum No. 1 - Personnel for Initial Tenant Selection and Renting

Scope and Content of Addendum: This addendum has been prepared as a guide to local housing authorities in selecting and training personnel for initial tenant selection and renting. It comprises a discussion of the following subjects:

- I. Basic Considerations in Selecting Personnel
- II. Suggested Staff Requirements and Functions
- III. Minimum Qualifications for Tenant Selection Personnel (Professional and Clerical)
- IV. Sources for Securing Qualified Personnel
- V. Staff Training

I. Basic Considerations in Selecting Personnel.

Careful staff selection and thorough job training are indispensable to obtain satisfactory results in tenant selection. The necessary experience and educational qualifications of staff members will vary according to the duties to be performed and the degree of responsibility to be assumed by each. The number will be dependent upon the size of the project and the length of time allotted to tenant selection activities. A small staff employed for a longer period is preferable to a larger staff for a shorter period. This facilitates securing more competent personnel and makes better staff training possible, thus promoting office efficiency at a minimum of expense.

The processes of application taking, home visiting and other steps in verification of apparently eligible applications require skill in the interview method and in the assembling of pertinent family data. The final selection of tenants necessitates a careful review of the circumstances of each applicant family based on these facts. Not only is it essential



to ascertain that the family qualifies for acceptance according to all established policies of admission, but it is also necessary to determine if any of the social and economic problems presented may affect eligibility. To evaluate such factors without bias or prejudice and to know which agencies or individuals in the community to consult for reliable advice prior to making final decisions concerning eligibility requires the services of professionally qualified personnel skilled in the techniques and practices of family welfare work. Therefore, the staff selected to perform these functions must possess training and experience in fields which call for the use of similar techniques and judgments including previous experience in direct contact with families of low income and a thorough knowledge and understanding of their economic, social and racial backgrounds and characteristics.

The supervisor of tenant selection should be a progressive person of recognized professional standing. In the case of slum clearance projects, it is highly desirable that the person engaged to act in a supervisory capacity in tenant selection should have been identified with or in close touch with relocation activities. If the supervisor appointed has had no previous experience in actual tenant selection work, it is advantageous to make arrangements for this staff member to secure special training and to observe and if possible to actually participate for a period in tenant selection for another USHA-Aided project before assuming active responsibility for these duties.

It is recommended that wherever practicable the supervisor of tenant selection be employed in a permanent capacity from the outset, either on the project management staff or on the staff of the local housing authority, depending upon the number of projects involved and the local administrative set-up. Thus problems of tenant turnover, periodic review of the eligibility of tenants for continued occupancy, and related activities which are an integral part of project management will have the benefit of the continuing services of the staff member originally charged with the responsibility of initial tenant selection. If the scope of these activities does not warrant the full time services of one person, responsibility for community relations may also be delegated to the same person provided the staff member selected possesses the requisite qualifications to handle both phases of the work.



There are many advantages also in engaging other permanent management staff members and having them participate in initial tenant selection before assuming their regular duties. In slum clearance projects, it is desirable to utilize employees for tenant selection, if qualified, who have had the benefit of previous participation in relocation. The services of all professional and clerical personnel temporarily engaged for initial tenant selection should be confined to these specific activities and never confused with the regular functions of project management.

## II. Suggested Staff Requirements and Functions.

Activities pertaining specifically to initial tenant selection should be entirely separated from the regular project management office and may be conducted in a special temporary office located at some central point in the city or on the project site. All phases of initial renting should be conducted on the project site. A special temporary rental office may be necessary during the period of initial renting. However, all financial transactions in connection with renting should always be conducted in the management office according to the regularly established method of handling rent collections.

Below are outlined suggested professional and clerical staff requirements and specific functions to be performed in conjunction with initial tenant selection and renting. This outline does not embrace other management functions entailed in initial occupancy, nor does it present requirements for essential janitorial and custodial services. In very small projects certain of the duties outlined will of necessity be combined and handled by an even smaller staff than indicated, often with direct participation by the Housing Manager. In large projects, or where tenant selection for two or more projects is centralized, the staff may have to be considerably expanded as shown in the outline and the work of staff members divided with certain specific functions delegated to different persons or to separate divisions.



PROFESSIONAL STAFF

STAFF MEMBER

FUNCTIONS

SUPERVISOR OF

TENANT SELECTION<sup>1/</sup>

....Assists in formulating standards of admission and conditions of occupancy.

Maintains a working relationship with the Tenant Selection Advisory Committee, and may assist in establishing this committee.

Assists in preparation of leaflets for direct distribution to prospective tenants and in the planning and execution of other methods of publicity devised to reach eligible applicants.

Prepares local tenant selection manual, assembles and organizes all requisite reference and training material.

Establishes working relationships with local agencies and groups whose cooperation will be required in tenant selection.

Organizes the set-up for tenant selection and assists in interviewing and selecting personnel.

Trains the tenant selection staff.

Supervises and directs the work of interviewers and other staff members by staff meetings, conferences, etc., as to content and quality of work.

Makes preliminary reviews of all applications prior to verification.

Reviews verified applications and makes recommendations for final action.

Interviews applicants presenting special problems as requests for reconsideration of eligibility, etc.

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<sup>1/</sup> Where the volume of work demands, certain special aspects should be assigned to one or more supervisory assistants.



(Professional Staff - continued)

STAFF MEMBERS

FUNCTIONS

SUPERVISOR OF

TENANT SELECTION....

(Cont'd)

Assists in assigning dwelling units, interviewing accepted families, explaining terms of lease, management policies, etc.

Performs special duties and assignments as required, as preparation or review of statements for the press, special reports, etc., on tenant selection.

INTERVIEWERS.....

Take applications for admission and make decisions concerning apparent eligibility or definite ineligibility, etc. Interpret such decisions to applicants.

(As many as required)

Determine and take all steps essential to verifying eligibility of applicant families according to assignments made. This includes written communications, home visits, and other field visits, as personal interviews with employers, representatives of social agencies, and others as required. (Single phases of verification may be assigned to individual interviewers to facilitate contacts).

Act as assistants to supervisor on special aspects of tenant selection where volume of work demands.<sup>1/</sup>

Submit regular reports (daily or weekly) showing progress of work.

CLERICAL STAFF

RECEPTIONIST -

TYPIST<sup>2/</sup>

..... Receives applicants, maintains master card file, schedules appointments for taking applications if this method is to be followed.

Completes steps preliminary to taking applications, routes the folder, and refers applicant to interviewer.

Answers general inquiries concerning rents, eligibility requirements, etc., and refers other inquiries to the correct source of information.

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<sup>1/</sup> Such assistants may be referred to as senior interviewers or given special titles descriptive of the actual work performed.

<sup>2/</sup> Because of the importance of first contacts with prospective tenants, serious consideration should be given to assigning a professionally qualified staff member to these duties, with such clerical assistance as is required.



(Clerical Staff - continued)

<u>STAFF MEMBER</u>	<u>FUNCTIONS</u>
RECORD CLERK - TYPIST	<p>.....Sets up and maintains files of initial tenant selection.</p> <p>Posts control cards to indicate assignment of applications and classification status of each from the time it is filed until its final disposition.</p> <p>Prepares progress reports as to status of all applications and tabulates statistical data as required.</p>
RENTAL CLERK..... (With assistants as required)	<p>Maintains a current record showing dwelling units assigned, occupied, unassigned and unoccupied, during the period of initial renting, including a site plan showing available space.</p> <p>Shows dwelling units and display units; supervises others in performance of such duties.</p> <p>Prepares moving-in assignments and service space assignments and issues necessary instructions to custodial staff. Maintains the necessary records in this connection.</p>
STENOGRAPHERS - TYPISTS (As many as re- quired. - Cer- tain special- ized duties are best dele- gated to one person)	<p>....Take in shorthand and transcribe dictated letters required by the supervisor or by the interviewers.</p> <p>Fill in form letters, reports or inquiries as required in connection with verification.</p> <p>Handle incoming and outgoing mail and maintain a tickler file for outstanding communications.</p> <p>Type schedules or weekly summaries and reports as required for the supervisor, the Housing Manager, or the local authority.</p> <p>Take in shorthand and transcribe technical reports and other special material required by the supervisor or the Housing Manager.</p> <p>Assist record clerk, receptionist, or rental clerk in the performance of routine clerical duties, if volume of work demands.</p> <p>Act in a secretarial capacity to supervisor of tenant selection including handling of personnel files, etc.</p> <p>Answer the telephone (or handle the switchboard in a large set-up).</p>



III. Minimum Qualifications for Tenant Selection Personnel.

A. Professional Personnel

Supervisor of Tenant Selection <sup>1/</sup>

Training

Graduation from a college of recognized standing, with major training in the social sciences, and public or social work administration. (Graduation from or graduate study in a school of social work preferred).

Experience

Three years of experience in recognized public or private social agencies requiring a thorough knowledge of community organization and the requisite techniques of family welfare work, one year of which shall have been of administrative character or in a supervisory or training capacity.

(An equivalent combination of experience and training may be accepted in lieu of the above stated requirements.)

Special Qualifications

This type of service requires sympathetic consideration and impartial analysis of the varied problems of low-income families and a genuine interest in and understanding of people. To achieve success this worker should be alert, resourceful and imaginative, with ability to organize and direct the work of others, and to establish findings and make recommendations clearly and logically in either oral or written form. In addition, this worker should have a broad knowledge of the public housing program and possess the personality and tact to interpret successfully the principles and techniques of tenant selection to members of the local housing authority and to representatives of various agencies or lay groups unfamiliar with these functions.

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<sup>1/</sup> In addition to the above qualification, training and experience in group work are requisite if the person selected is to be a permanent member of the management staff, responsible also for the community relations aspects of the work.



(Professional Personnel - continued)

Interviewers 1/

Training

Graduation from a college of recognized standing, with major training in the social sciences. (Graduation from or graduate study in a school of social work preferred).

Experience

One year of experience with recognized public or private social agencies requiring a thorough knowledge of community organization and the requisite techniques of family welfare work.

(An equivalent combination of experience and education may be accepted in lieu of the above stated requirements).

Special Qualifications

This type of service requires sympathetic consideration and objective analysis of the varied problems of low-income families and demonstrated ability to verify, analyze and evaluate facts and to make sound recommendations based upon findings. Resourcefulness and tact and a genuine interest in and understanding of people, are essential qualifications.

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1/ In addition to the above qualifications, at least one year of experience of administrative character or in a supervisory capacity are requisites if interviewers are to be given responsibility for serving as assistants to the supervisor of tenant selection.



## B. Clerical Personnel

In addition to the minimum qualifications of training and experience given below, the selection of clerical workers should be given careful consideration to obtain a clerical staff comprised of individuals who are alert, quick to grasp, adaptable, and possessing ability to work well with others. This is of utmost importance because of the temporary nature of the work. Further, since clerical personnel in a tenant selection office will have more contact with the public than is usual in commercial employment, special attention should be given to the selection of individuals who have a pleasing and tactful manner and experience in work involving public contacts. Such qualifications are indispensable in the case of the rental clerk and receptionist.

### Receptionist-Typist

#### Training

Graduation from high school, or completion of a special business or commercial course. (Supplementary courses in the social sciences and related fields preferred).

#### Experience

Two years of experience in work which has involved direct contact with the public, preferably in a public or private welfare agency involving responsibility for scheduling appointments and maintaining records covering matters affecting low-income families.

(An equivalent combination of experience and education may be accepted in lieu of the above stated requirements).

### Record Clerk-Typist

#### Training

Training equivalent to that represented by graduation from high school, or completion of a special business or commercial course.

#### Experience

Two years of experience in typing, clerical and general office work (preferably in a public or private welfare agency, insurance or real estate office) including responsibility for setting up and maintaining files similar to those required in tenant selection.



(Clerical Personnel - continued)

Rental Clerk

Training

Graduation from high school.

Experience

Two years of experience in work which has involved direct contact with the public, preferably with low-income families. (Experience in a public or private welfare agency, in the rental department of a real estate office, or other comparable work).

(An equivalent combination of experience and education may be accepted in lieu of the above stated requirements).

Stenographers - Typists - Clerks

Training

Training equivalent to that represented by graduation from commercial high school, or completion of a special business or commercial course.

Experience

Two years of experience in taking shorthand, typing and general office work.

(An equivalent combination of experience and education may be accepted in lieu of the above stated requirements).



#### IV. Sources for Securing Qualified Personnel.

##### A. Special Factors to be Considered

Salaries for tenant selection personnel, both professional and clerical, should be based upon local prevailing wage scales for comparable types of employment.

Where interviewers are expected to use their own automobiles or will be required to make other expenditures in connection with field work, they should receive special allowances to cover transportation, telephone calls, and other incidental expenses. All those employed should understand in advance that it may be necessary to stagger working hours in order to keep the Tenant Selection Office open evenings and on Sundays to facilitate the taking of applications. It should be made clear to interviewers that field work will sometimes involve calls in the evening.

##### B. Employment Sources

###### 1. Local Social Agencies

Departments of public welfare and other social agencies in the community may be willing to cooperate by granting leaves of absence to competent professional members of their staffs for the duration of initial tenant selection. Such agencies may also be able to recommend former staff members, retired from active professional life due to marriage, etc., who would be interested in accepting temporary employment.

###### 2. Universities and Schools of Social Work

Universities and colleges which have social science departments, or divisions of public welfare or social service administration and schools of social work should be consulted as a means of securing qualified professional staff members.



3. Professional Associations

National professional associations, such as the National Association of Housing Officials, (1313 East Sixtieth Street, Chicago, Illinois), and the American Association of Social Workers, (130 East 22d Street, New York City), constitute potential sources of personnel, especially for the position of tenant selection supervisor, and particularly if this staff member is to be engaged on a permanent basis.

4. U. S. Employment Service

Local offices of the U. S. Employment Service maintain registers of available personnel which should be consulted. These may contain professional as well as clerical listings.

5. Files of the Personnel Division of the USHA

The Personnel Division of the USHA maintains a file of applicants for positions, and upon request, will be glad to submit the names as well as a digest of the training and experience of persons qualified for tenant selection. When in the Washington office representatives of local housing authorities may wish to consult members of the Personnel Division,

6. Local Civil Service Registers

Where there is a state or municipal Civil Service Commission, it may be incumbent upon the local housing authority to employ from its register. Establishing such a register will usually call for special examinations for permanent staff members engaged for tenant selection or for other phases of project management. In such cases, a representative of the local authority should confer with the Civil Service Commission well in advance of the actual employment of personnel. In any event, local civil service registers constitute a potential source of tenant selection personnel, both professional and clerical, which should be consulted.



## V. Staff Training.

### A. Nature and Method of Training

The entire staff, including clerical employees, should be thoroughly familiarized with the project, dwelling unit sizes and types, rent charges, and the routine office procedures. The receptionist, the record clerk, and other members of the clerical staff will require specific instruction in the work to be performed by each.

In addition, at least one week prior to active tenant selection should be devoted to the orientation and training of the professional staff through lectures, staff discussions, supervised field work, and reading assignments. Responsibility for the organization and direction of such training should rest with the supervisor of tenant selection.

Where application taking has been started some months in advance of the establishment of the complete set-up for actual tenant selection (according to the procedure recommended), the application interviewers employed at an earlier period should receive similar job training before undertaking their duties.

Following is a suggested outline of subjects to be covered in staff training and a list of suitable reference materials:

### B. Subjects to be Covered

#### The Housing Problem

The extent of slums and blighted areas in the United States; economic and social effects of slums; the development of public housing in the United States and its acceptance as a responsibility of the Government.

#### The Housing Program - Federal Aspects

The functions of various departments or agencies dealing with housing; provisions of the U. S. Housing Act; extent of local participation in the program of the USHA.

#### The Housing Program - Local Aspects

Local housing conditions; building regulations, zoning laws, methods and extent of enforcement; state and local enabling legislation; activities of local housing authority to date, including relocation in slum clearance projects, results of WPA Real Property Inventories.



## Subjects (Cont'd)

### The Project - Community Services

Location of public, nursery, and other special schools; churches of all denominations; hospitals and clinics; community centers, playgrounds, parks, etc.; shopping centers and other neighborhood resources; and transportation facilities and rates.

### The Project - Physical Aspects

Dwelling unit sizes and types; facilities and rental charges; facilities for community activities, etc.

### The Project - Management Policies

Plans for disinfestation of household furnishings, if this is to be required in connection with initial occupancy; the rental agreement or lease; methods of rent collections, etc.; management policies regarding tenant maintenance of property, use of laundries, garbage and trash collection, etc.

### Tenant Selection - Policies and Procedures

Compliance with the letter and spirit of the U. S. Housing Act; local policies and procedures; objectives, techniques and methods of all phases of the work.

## C. Reference Material

### Local Reference Material

1. Literature issued by the local housing authority dealing with the local housing program.
2. State and local enabling legislation.
3. Surveys, maps and reports on local housing conditions.
4. Summary reports on relocation activities and results in the case of slum clearance projects.

### Tenant Selection

1. Local manual of tenant selection policies and procedures, including approved standards of eligibility and conditions of occupancy; outline of office routine (procedure for filing, routing, etc.); tenant selection and renting forms and instructions for their use.



Reference Material

Tenant Selection (Cont'd)

2. Reference materials, such as files of former site occupants, housing reference file, family budget guide, summary outline of community services, etc.
3. Local handbook of management policies and advice on the care of walls, floors, equipment, etc., prepared for distribution to tenants.

General Reference Material

The following reference material is available for distribution from the Informational Service Division, USHA. For general bibliographies in the field of housing, consult the Informational Service Division of the USHA and the National Association of Housing Officials.

1. "The U. S. Housing Act as Amended" - (and Provisions of Other Laws and of Executive Orders Pertaining to the U. S. Housing Act of 1937, as amended).
2. "Initial Steps in Tenant Selection", Bulletin No. 22 on Policy and Procedure (and supplementary releases).
3. "Slums and Blighted Areas in the United States", Dr. Edith Elmer Wood, (Reprint, 1938).
4. "Housing in My Time", Shelter, December, 1938, Dr. Edith Elmer Wood, (Reprint No. 47457).
5. "What the Housing Act Can Do for your City".
6. "9 Questions and 9 Answers - The Program of the USHA - Its Record to Date".
7. USHA Leaflet Series:
  - "The Business Man and Public Housing"
  - "Rehousing Relief Families"
  - "Tax Exemption of Public Housing"
8. Annual Report of the U. S. Housing Authority for 1938.

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