

# 2018

## Moving To Work ANNUAL REPORT



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# Section I.

## Introduction

Authorized by Congress in 1996, the Moving to Work Deregulation Demonstration (MTW) provides high performing Public Housing Authorities (PHAs) broad regulatory relief from some of the more onerous provisions of the United States Housing Act of 1937, as amended. MTW PHAs are tasked with demonstrating how they leverage MTW's regulatory relief to improve the lives of low-income households living in the communities they serve, while using the funds they receive through their contracts with the U.S. Department of Housing and Urban Development (HUD) more effectively than non-MTW PHAs. Specifically, Congress asked MTW agencies to demonstrate the benefits of MTW's flexibilities by meeting the following objectives:

- Reduce cost and achieve greater cost effectiveness in Federal expenditures;
- Give incentives to households with children where the head of household is working, is seeking work, or is preparing for work by participating in job training, educational programs, or programs that assist people to obtain employment and become economically self-sufficient; and
- Increase housing choices for low-income households.

## Overview of Short-Term and Long-Term MTW Goals and Objectives

Receiving its MTW designation in 2000, Keene Housing (KH) is a member of the initial MTW cohort. As we approach our 20th year in MTW, the "demonstration" is not ancillary to our mission and operations, but rather central to them. MTW affects every part of Keene Housing - our mission, our strategic planning and, especially, our success. As such, it is very difficult to delineate between MTW and non-MTW strategies when discussing the organization's short or long-term goals and objectives; MTW has been in our blood far too long to disentangle one from the other.

None-the-less, as required, this 2018 MTW Annual Report presents KH's MTW-related performance and accomplishments during the fiscal year (FY) ending December 31, 2018. In FY 2018, we continued meeting or exceeding our goals in the areas of affordable housing provision, maintenance and redevelopment as well as resident services.

For example, in 2018 we provided housing assistance to nearly 1,000 households through KH-owned and managed family and elderly communities, quality housing in the private market through our voucher programs, and expansive resident services programs to working and elderly/disabled voucher holders and residents through our Resident Self Reliance, Community Connections and Community Gardening programs. And, once again, our Housing Choice Voucher Program lease rate exceeded 100%, thanks to long-established MTW rent and administrative reforms.

In 2018 we continued leveraging MTW flexibility to reinvest into our aging affordable housing stock, spending \$1.1 million on improvements across the portfolio, including significant landscaping, energy and window projects. Most notably, we made a significant leap towards meeting our goal of relying entirely on renewable energy by 2035, with the installation of a 106-kilowatt photovoltaic array at Harper Acres, our largest property.

These are just a few of Keene Housing's accomplishments over the past year, all of which are consistent with the short and long-term goals articulated in the 2015-2020 Strategic Plan (please see APPENDIX II). As this Annual Report is being drafted, Keene Housing is beginning the process of creating our next five-year Strategic Plan. The planning process begins with interviews and surveys of residents, voucher holders, property owners, as well as local, regional and national partners, including HUD staff.

After exhaustive consultation and visioning with staff and Board members, the Plan will be drafted in late summer and shared with our community for additional input and recommendations. The final Strategic Plan will go to our Board of Commissioners near year's end. In addition to including a goal specific to MTW, the innovation and flexibility that MTW permits us will play a large role in establishing and achieving all of our goals, even those that may not immediately appear to have a direct connection to MTW.

As our nearly two decades in MTW demonstrates, the MTW Agreement is not simply a contract that articulates our rights and obligations vis-à-vis our relationship with HUD; it is a document that has, over time, transformed our organization and embedded into it a commitment to innovation and intellectual curiosity that propels us forward and compels us to constantly improve.

## Section II.

# General Housing Authority Operating Information

### **Housing Stock Information**

Keene Housing owns or manages 551 units of affordable housing including two homeless shelters, two HUD multifamily properties, six Low Income Housing Tax Credit (LIHTC) properties, one home for chronically mentally ill, and ten former public housing developments.

MTW plays an integral part in the management of our entire portfolio. Both our former public housing portfolio and many of our LIHTC properties include MTW Project Based Voucher (PBV) subsidies; our homeless shelters utilize sponsor-based subsidies provided through our Transitional Housing Assistance Subsidy Program (THASP); and in 2015 we completed the conversion of Meadow Road, an expiring use Project-Based Section 8 property, to MTW PBVs through our Affordable Housing Preservation activity. For a clearer picture of which units benefit from our participation in MTW, please see the table provided in Appendix I.

## General Operating Information

### New Housing Choice Vouchers that were Project Based During the Fiscal Year

Table 1. New PBVs issued in FY2018.

| Property Name | Anticipated Number of New Vouchers to be Project-Based* | Actual Number of New Vouchers that were Project-Based | Description of Project |
|---------------|---|---|------------------------|
| N/A           | 0   | 0   | N/A                    |

Table 2. Total PBVs Committed in FY2018.

| Anticipated Total Number of PBVs Committed at the End of the Fiscal Year* | Anticipated Total Number of PBVs Leased Up or Issued to a Potential Tenant at the End of the Fiscal Year |
|---|--|
| 336   | 336  |
| Actual Total Number of PBVs Committed at the End of the Fiscal Year       | Actual Total Number of PBVs Leased Up or Issued to a Potential Tenant at the End of the Fiscal Year      |
| 336   | 331  |

### Other Changes to the Housing Stock That Occurred During the Fiscal Year

There were no other changes to our housing stock in FY2018.

### General Description of All Planned Capital Fund Expenditures During the Plan Year

KH does not have any public housing units and is ineligible for Capital Funds at this time.

Table 3. Other Housing Owned and/or Managed by KH

| Housing Program*                         | Total Units | Overview of the Program   |
|--|-------------|---|
| Non-MTW HUD Funded                       | 100         | Includes 90 Multifamily Section 8 and 10 Section 202 units  |
| Tax Credit                               | 81          | 81 2- and 3-bedroom townhouse style units including 2 accessible units; mix of Tax Credit, USDA RD, Multifamily Section 8, and HOME subsidies |
| Market Rate                              | 26          | 24 1-bedroom units at Ashbrook managed for Cheshire Housing Opportunities and 2 units at Brookbend East                                       |
| Total Other Housing Owned and/or Managed | 207         |   |

\*Select Housing Program from: Tax-Credit, State Funded, Locally Funded, Market-Rate, Non-MTW HUD Funded, Managing Developments for other non-MTW Public Housing Authority, or Other.

If Other, please describe: N/A

## Leasing Information

The tables on the following pages provide details on the families served by KH. The first section is a snapshot and unit information on the number of households served through Public Housing and MTW Housing Choice Vouchers. The second section provides information about the families served through KH's Transitional Housing Assistance Subsidy Program (THASP) and Project MARCH, a local, non-traditional MTW funded program. For more information on these activities please see page 38 and 59, respectively. The third section provides an overview of the mix of families served by KH through our traditional MTW Housing Choice Voucher (HCV) program. The final section reports on households participating that successfully transitioned out of housing assistance in FY2018.

## Actual Number Households Served

Table 1. Number of Households Served at the End of the Fiscal Year (Number of Households Served).

| Housing Program                              | Number of Households Served* |        |
|--|------------------------------|--------|
|  | Planned                      | Actual |
| MTW Public Housing Units                     | 0                            | 0      |
| MTW Housing Choice Vouchers                  | 587                          | 591    |
| Total Projected and Actual Households Served | 587                          | 591    |

\* Calculated by dividing the planned/actual number of unit months occupied/leased by 12.

\*\* In instances when a Local, Non-Traditional program provides a certain subsidy level but does not specify a number of units/Households Served, the PHA should estimate the number of Households Served.

Table 2. Number of Households Served at the End of the Fiscal Year (Units Months Leased)

| Housing Program  | Unit Months Occupied/Leased**** |        |
|--|---------------------------------|--------|
|  | Planned                         | Actual |
| MTW Public Housing Units                               | 0                               | 0      |
| MTW Housing Choices Vouchers                           | 7,044                           | 7,092  |
| Total Projected and Annual Unit Months Occupied/Leased | 7,044                           | 7,092  |

\*\*\* In instances when a Local, Non-Traditional program provides a certain subsidy level but does not specify a number of units/Households Served, the PHA should estimate the number of Households Served.

\*\*\*\* Unit Months Occupied/Leased is the total number of months KH has occupied/leased units, according to unit category during the year.

## Households Served through Local Non-Traditional MTW Funded Programs

Table 3. Number of Households Served at the End of the Fiscal Year (Number of Households Served).

| Housing Program  | Number of Households Served* |        |
|--|------------------------------|--------|
|  | Planned                      | Actual |
| Number of Units that were Occupied/Leased through Local Non-Traditional MTW Funded Property-Based Assistance Programs ** | 62                           | 56     |
| Number of Units that were Occupied/Leased through Local Non-Traditional MTW Funded Tenant-Based Assistance Programs **   | 20                           | 5      |
| Total Projected and Actual Households Served   | 82                           | 61     |

\* Calculated by dividing the planned/actual number of unit months occupied/leased by 12.

\*\* In instances when a Local, Non-Traditional program provides a certain subsidy level but does not specify a number of units/Households Served, the PHA should estimate the number of Households Served.

Table 4. Number of Households Served at the End of the Fiscal Year (Units Months Leased)

| Housing Program   | Unit Months Occupied/Leased**** |        |
|---|---------------------------------|--------|
|   | Planned                         | Actual |
| Number of Units that were Occupied/Leased through Local Non-Traditional MTW Funded Property-Based Assistance Programs *** | 744                             | 672    |
| Number of Units that were Occupied/Leased through Local Non-Traditional MTW Funded Tenant-Based Assistance Programs ***   | 240                             | 60     |
| Total Projected and Annual Unit Months Occupied/Leased  | 984                             | 732    |

\*\*\* In instances when a Local, Non-Traditional program provides a certain subsidy level but does not specify a number of units/Households Served, the PHA should estimate the number of Households Served.

\*\*\*\* Unit Months Occupied/Leased is the total number of months KH has occupied/leased units, according to unit category during the year.

Explanation for Differences Between Planned and Actual Households Served

In 2018 Project MARCH utilized five (6) of the twenty (20) project-based vouchers set aside for the program. Southwestern Community Services, a partner with Keene Housing in the Transitional Housing Assistance Subsidy Program (THASP) closed their Second Chance for Success program in February of 2018 relinquishing twelve (12) sponsor based subsidies for the remainder of 2018.

Households Served Through Local Non-Traditional Services Only

Table 6. Average and Total Number of Households Served at the End of the Fiscal Year

|  | Average Number of Households Served Per Month | Total Number of Households Served During the Year |
|--|---|---|
| Households Served through Local, Non-Traditional Services Only | 0   | 0   |

## Reporting Compliance with Statutory MTW Requirements

### 75% of Families Assisted are Very Low-Income

HUD will verify compliance with the statutory objective of “assuring that at least 75 percent of the families assisted by the Agency are very low-income families” is being achieved by examining public housing and Housing Choice Voucher family characteristics as submitted into the PIC or its successor system utilizing current resident data at the end of the agency’s fiscal year. The PHA will provide information on local, non-traditional families provided with housing assistance at the end of the PHA fiscal year, not reported in PIC or its successor system, in the following format:

*Table 7. Local, Non-Traditional Households Served Annually*

| Fiscal Year  | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 |
|--|------|------|------|------|------|------|------|------|
| Total Number of Local, Non-Traditional MTW Households Assisted                                   | 181  | 350  | 646  | 731  | 747  | 799  | 732  | 0    |
| Number of Local, Non-Traditional MTW Households with Incomes Below 50% of Area Median Income     | 181  | 350  | 646  | 731  | 747  | 799  | 732  | 0    |
| Percentage of Local, Non-Traditional MTW Households with Incomes Below 50% of Area Median Income | 100% | 100% | 100% | 100% | 100% | 100% | 100  | 0    |

## Reporting Compliance with Statutory MTW Requirements: Maintain Comparable Mix

In order to demonstrate that the statutory objective of “maintaining a comparable mix of families (by family size) are served, as would have been provided had the amounts not been used under the demonstration” is being achieved, the PHA will provide information in the following formats:

*Table 8. Baseline for the Mix of Family Sizes Served (FY 1999)*

| Family Size | Occupied Number of Public Housing units by Household Size when PHA Entered MTW | Utilized Number of Section 8 Vouchers by Household Size when PHA Entered MTW | Non-MTW Adjustments to the Distribution of Household Sizes | Baseline Number of Household Sizes to be Maintained | Baseline Percentages of Family Sizes to be Maintained |
|-------------|--|--|--|---|---|
| 1 Person    | 0  | 316  | 0  | 316   | 54%   |
| 2 Person    | 0  | 118  | 0  | 118   | 20%   |
| 3 Person    | 0  | 80   | 0  | 80  | 14%   |
| 4 Person    | 0  | 44   | 0  | 44  | 8%  |
| 5 Person    | 0  | 17   | 0  | 17  | 3%  |
| 6+ Person   | 0  | 10   | 0  | 10  | 2%  |
| Totals      | 0  | 585  | 0  | 585   | 100%  |

Explanation for Baseline Adjustments to the Distribution of Household Sizes Utilized

N/A

*Table 9. Actual Mix of Family Sizes Served*

|  | <b>1<br/>Person</b> | <b>2<br/>Person</b> | <b>3<br/>Person</b> | <b>4<br/>Person</b> | <b>5<br/>Person</b> | <b>6+<br/>Person</b> | <b>Totals</b> |
|--|---------------------|---------------------|---------------------|---------------------|---------------------|----------------------|---------------|
| Baseline Percentages of Household Sizes to be Maintained**               | 54%                 | 20%                 | 14%                 | 8%                  | 3%                  | 2%                   | 100%          |
| Number of Households Served by Family Size this Fiscal Year***           | 389                 | 125                 | 86                  | 42                  | 13                  | 10                   | 665           |
| Percentages of Households Served by Household Size this Fiscal Year****† | 58%                 | 19%                 | 13%                 | 6%                  | 2%                  | 2%                   | 100%          |
| <b>Percentage Change</b>   | <b>4%</b>           | <b>-1%</b>          | <b>-1%</b>          | <b>-2%</b>          | <b>-19%</b>         | <b>0%</b>            | <b>0%</b>     |

\* "Non-MTW adjustments to the distribution of family sizes" are defined as factors that are outside the control of the PHA. Acceptable "non-MTW adjustments" include, but are not limited to, demographic changes in the community's population. If the PHA includes non-MTW adjustments, HUD expects the explanations of the factors to be thorough and to include information substantiating the numbers used.

\*\* The numbers in this row will be the same numbers in the chart above listed under the column "Baseline percentages of family sizes to be maintained."

\*\*\* The methodology used to obtain these figures will be the same methodology used to determine the "Occupied number of Public Housing units by family size when PHA entered MTW" and "Utilized number of Section 8 Vouchers by family size when PHA entered MTW" in the table immediately above.

\*\*\*\* The "Percentages of families served by family size this fiscal year" will reflect adjustments to the mix of families served that are directly due to decisions the PHA has made. HUD expects that in the course of the demonstration, PHAs will make decisions that may alter the number of families served.

†Does not include households served through KH's local non-traditional MTW programs, THASP and Project MARCH.

**Description of any Issues Related to Leasing of Public Housing, Housing Choice Vouchers, or Local, Non-Traditional Units and Solutions at Fiscal Year End**

Keene Housing did not have any issues relating to leasing in its programs during the fiscal year.

*Table 10. Leasing issues during fiscal year by program.*

| Housing Program | Description of Leasing Issues and Solutions |
|-----------------|---|
| N/A             | N/A   |

**Number of Households Transitioned to Self-Sufficiency by Fiscal Year End**

KH uses two definitions for self-sufficiency. The first definition, “economic self-sufficiency”, counts households that leave housing assistance through KH’s \$0 HAP Threshold activity (page 32). Households who meet this criteria have increased their income enough that KH’s Housing Assistance Payment (HAP) is reduced to \$0. After six months at \$0 HAP, KH determines that the household no longer requires housing assistance and the household’s participation in the voucher program is ended.

KH’s second definition, “personal self-sufficiency”, counts households that voluntarily terminate participation. Generally, these households leave the program because they have found a way to afford housing without KH’s assistance. In some cases, a household may have found housing that better suits their needs at a lower price or where housing costs are offset in some way, such as becoming a live-in aid. In other cases, a household may have reduced their debt to the point that they feel they can afford rent without assistance, purchased a home without KH assistance, or found a job outside of our jurisdiction and do not feel that porting out is worth the required time and paperwork. KH does not include households who choose to terminate their participation to avoid eviction or termination from the HCV program for non-compliance as having attained self-sufficiency.

## General Operating Information

*Table 11. Number of Households Transitioned To Self-Sufficiency by Fiscal Year End*

| <b>Activity Name/#</b>  | <b>Number of Households Transitioned</b> | <b>Agency Definition of Self Sufficiency</b>   |
|---|--|--|
| \$0 HAP Rent Burden Test/<br>2013.01.SS                               | 5  | Economic self-sufficiency: Household HAP is reduced to \$0 due to an increase in gross income                        |
| Resident Self-Reliance/ 1999.05.<br>SS                                | 23                                       | Personal self-sufficiency: Voluntary termination for reasons other than to avoid eviction or HCV program termination |
| Households Duplicated Across Activities/<br>Definitions               | 0  |  |
| Annual Total Number of Households<br>Transitioned to Self-Sufficiency | 28                                       |  |

## Wait List Information

Table 12. Projected Number of Wait List Applicants for FY2018 by Wait List Type.

| Housing Program(s)*                   | Wait List Type**                | Number of Households on Wait List | Wait List Open, Partially Open, or Closed*** | Are There Plans to Open the Wait List During the Fiscal Year |
|---------------------------------------|---------------------------------|-----------------------------------|--|--|
| Federal MTW HCV Units (Tenant-Based)  | Community-Wide                  | 1638                              | Open   | N/A  |
| Federal MTW HCV Units                 | Program Specific (NED)          | 303                               | Open   | N/A  |
| Federal Non-MTW HCV Units             | Program Specific (Mainstream)   | 239                               | Open   | N/A  |
| Federal MTW HCV Units (Project Based) | Site-based (Unduplicated)       | 1183                              | Open   | N/A  |
| Federal MTW HCV Units (Tenant Based)  | Program Specific (PBV Mobility) | 129                               | Partially Open                               | No   |

\* Select Housing Program: Federal MTW Public Housing Units; Federal MTW Housing Choice Voucher Program; Federal non-MTW Housing Choice Voucher Units; Tenant-Based Local, Non-Traditional MTW Housing Assistance Program; Project-Based Local, Non-Traditional MTW Housing Assistance Program; and Combined Tenant-Based and Project-Based Local, Non-Traditional MTW Housing Assistance Program.

\*\* Select Wait List Types: Community-Wide, Site-Based, Merged (Combined Public Housing or Voucher Wait List), Program Specific (Limited by HUD or Local PHA Rules to Certain Categories of Households which are Described in the Rules for Program Participation), None (If the Program is a New Wait List, Not an Existing Wait List), or Other (Please Provide a Brief Description of this Wait List Type).

\*\*\* For Partially Open Wait Lists, provide a description of the populations for which the wait list is open.

The PBV Mobility Waitlist is only available to households leased up in a PBV unit interested in obtaining a tenant-based voucher.

If Local, Non-Traditional Housing Program, please describe:

N/A

If Other Wait List Type, please describe:

N/A

If there are any changes to the organizational structure of the wait list or policy change regarding the wait list, provide a narrative detailing these changes

## Section III.

# Proposed MTW Activities

All proposed activities that are granted approval by HUD are reported in Section IV as 'Approved Activities'.

## Section IV.

# Approved MTW Activities

The following table indexes all current MTW Activities with statutory objective, authorization cited, approval and implementation year, and status. A complete discussion of the each activity, challenges, and metrics begins on page 22.

| Activity Name  | Plan Year | Activity Type                  | Primary Statutory Objective | Status  |
|--|-----------|--------------------------------|-----------------------------|---------|
| Alternative Rent Burden Threshold                        | FY1999    | Rent Reform                    | Expand Housing Choices      | Ongoing |
| Eligibility Administration for Section 8 HCV Program     | FY1999    | Admission Policy               | Expand Housing Choices      | Ongoing |
| HQS Landlord Self-Certification Inspection Program       | FY1999    | Inspection Policy              | Cost Effectiveness          | Ongoing |
| Rent Reasonableness Neighborhood Analysis Discontinuance | FY1999    | Rent Reform                    | Expand Housing Choices      | Ongoing |
| Resident Self-Reliance Program                           | FY1999    | Resident Services              | Self-Sufficiency            | Ongoing |
| Stepped Subsidy Rent Reform                              | FY1999    | Rent Reform                    | Self-Sufficiency            | Ongoing |
| Unit Rent Reasonableness Analysis Discontinuance         | FY1999    | Rent Reform                    | Expand Housing Choices      | Ongoing |
| Transitional Housing Assistance Subsidy Program          | FY2000    | Supportive Housing Partnership | Expand Housing Choices      | Ongoing |
| Income Based Alternative Recertification Schedule        | FY2005    | Rent Reform                    | Cost Effectiveness          | Ongoing |
| Stepped Subsidy Alternative Recertification Threshold    | FY2005    | Rent Reform                    | Cost Effectiveness          | Ongoing |

## Approved MTW Activities

| Activity Name  | Plan Year | Activity Type             | Primary Statutory Objective | Status     |
|--|-----------|---------------------------|-----------------------------|------------|
| Standard Deductions  | FY2006    | Rent Reform               | Cost Effectiveness          | Closed Out |
| MTW Homeownership Program                                    | FY2008    | Homeownership             | Expand Housing Choices      | Ongoing    |
| Project-Based Voucher Program                                | FY2008    | Project Based Initiatives | Expand Housing Choices      | Ongoing    |
| Restrictions on Section 8 Portability                        | FY2008    | Mobility and Portability  | Cost Effectiveness          | Ongoing    |
| Housing Quality Standards (HQS) Biennial Inspection Schedule | FY2011    | Inspections Policy        | Cost Effectiveness          | Closed Out |
| \$0 HAP Rent Burden Test                                     | FY2013    | Occupancy Policy          | Cost Effectiveness          | Ongoing    |
| HQS Alternative Inspection Protocol                          | FY2013    | Inspection Policy         | Cost Effectiveness          | Closed Out |
| Affordable Housing Preservation and Modernization Program    | FY2014    | Use of Funds              | Expand Housing Choices      | Ongoing    |
| Affordable Housing Preservation Program (AHPP)               | FY2014    | Project Based Initiatives | Expand Housing Choices      | Ongoing    |
| Asset Exclusion Threshold                                    | FY2014    | Rent Reform               | Self-Sufficiency            | Ongoing    |
| Keene Housing Kids Collaborative                             | FY2014    | Use of Funds              | Self-Sufficiency            | Ongoing    |
| Medical Deduction Threshold                                  | FY2014    | Rent Reform               | Cost Effectiveness          | Ongoing    |
| AHPP Alternative Inspection Protocol                         | FY2016    | Inspection Policy         | Cost Effectiveness          | Ongoing    |
| AHPP Rent Reform   | FY2016    | Rent Reform               | Cost Effectiveness          | Ongoing    |
| Earned Income Disallowance (EID) Discontinuance              | FY2016    | Rent Reform               | Cost Effectiveness          | Ongoing    |
| Project-Based Unit Agency Conducted Inspections              | FY2016    | Inspection Policy         | Cost Effectiveness          | Ongoing    |

## Approved MTW Activities

| Activity Name  | Plan Year | Activity Type                     | Primary Statutory Objective  | Status  |
|--|-----------|-----------------------------------|------------------------------|---------|
| Project M.A.R.C.H.<br>(Monadnock Area<br>Resources Curing<br>Homelessness) | FY2016    | Supportive Housing<br>Partnership | Expanding Housing<br>Choices | Ongoing |
| PBV Mobility Wait List   | FY2017    | Mobility and<br>Portability       | Expanding Housing<br>Choices | Ongoing |
| Local Payment Standard   | FY2017    |                                   | Expanding Housing<br>Choices | Ongoing |

## Implemented Activities

### 1999.01.HC ELIGIBILITY ADMINISTRATION GUIDELINES

*Plan Year Approved: 2000    Year Implemented: 2000*

KH's MTW HCV program income eligibility threshold was increased to 80% of Area Median Income (AMI) as part of our original MTW agreement. This expanded the number of programs available to low-income households by targeting households up to 80% AMI.

In addition, Keene Housing added a \$100,000 asset threshold to our MTW program's eligibility guidelines in 2014. When determining eligibility, KH calculates anticipated income by applying all applicable income sources as described at 24 CFR 5.609. If the calculated income is 80% AMI or less, KH applies the asset threshold as a second layer for eligibility determination. Applicant households with assets of \$100,000 or more are not eligible for assistance even if the applicant's anticipated income falls at or below the 80% AMI threshold.

This threshold does not apply to inaccessible assets, such as irrevocable trusts. KH applies income from inaccessible assets to a household's income for determining income eligibility as if this threshold did not exist.

Keene Housing made no significant changes to this activity and no changes were made to the metrics and data collection.

**Benchmarks and Outcomes***HC #4: Displacement Prevention*

| Unit of Measurement   | Baseline 2007 | Benchmark | Outcome | Benchmark Achieved? |
|---|---------------|-----------|---------|---------------------|
| Number of households at or below 80% AMI that would lose assistance or need to move (decrease). | 228           | 0         | 0       | Yes                 |

**2008.03.HC MTW HOMEOWNERSHIP FLAT SUBSIDY**

*Plan Year Approved: 2009    Year Implemented: 2009*

In 2005 Keene Housing created its MTW Homeownership program as part of its Public Housing Resident Opportunities for Self-Sufficiency (ROSS) grant under the Family Self-Sufficiency (FSS) program (now Resident Self-Reliance). Over the course of administering the program, KH found that some households who expressed interest in homeownership were near 80% AMI when they began the process of meeting the program's requirements - such as homeownership counseling. As this process may take up to a year, it was possible that a household may have had income in excess of 80% AMI by the time a home was located and a lender secured. To avoid penalizing homeownership participants who increased their income above 80% AMI while in the process of finding a home, Keene Housing initiated, with HUD approval of our FY2008 Annual Plan, a flat subsidy for families in the Homeownership Program with incomes between 80% AMI and 140% AMI.

KH also applies the flat subsidy and 140% AMI ceiling to households after closing. Under the traditional HUD homeownership program, a non-elderly, non-disabled (work-able) household may receive assistance for up to 15 years on a 20 year or longer mortgage (10 years for a shorter mortgage). This assistance continues regardless of income after the initial income eligibility determination. By utilizing both an income guideline and HUD's standard term limits, KH promotes a participant's efforts to increase financial stability while holding the household to a higher standard than HUD's traditional homeownership program. With the 2008 economic and housing market instability, Keene Housing initiated a policy change that permitted homeownership families to request interim recertifications when their incomes changed. This policy change prevented at least two foreclosures and remains in place today.

No new Homeowner Vouchers were issued in 2018. Participation remained at 5 households.

**Benchmarks and Outcomes***HC #5: Increase in Resident Mobility*

| Unit of Measurement  | Baseline 2007 | Benchmark | Outcome | Benchmark Achieved? |
|--|---------------|-----------|---------|---------------------|
| Number of households able to move to a better unit and/or neighborhood of opportunity as a result of this activity (increase). | 0             | 0         | 0       | Yes                 |

*HC #6: Increase in Homeownership Opportunities*

| Unit of Measurement  | Baseline 2007 | Benchmark | Outcome | Benchmark Achieved? |
|--|---------------|-----------|---------|---------------------|
| Number of households that purchased a home as a result of the activity (increase). | 1             | 1         | 0       | No                  |

**Challenges to Achieving Benchmarks**

Most households are finding it easier to purchase a home without KH's assistance. For example in 2018, 3 households became homeowners through programs other than KH's.

**1999.02.CE HOUSING QUALITY STANDARDS (HQS) LANDLORD SELF-CERTIFICATION INSPECTION PROTOCOL**

*Plan Year Approved: 2000    Year Implemented: 2000*

This activity permits participating property owners to self-certify HQS compliance, after the initial KH HQS inspection, with KH performing quality control inspections on randomly selected owner certified units during occupancy. Additionally, participants can request a special inspection anytime they believe their unit violates HQS. Units that fail a biennial, quality control, or tenant requested inspection return to a KH administered annual inspection schedule until the unit receives a 'Pass' status.

No Housing Quality Standards inspections were conducted by landlords in 2018. Agency Cost Savings outcome is attributed to the biennial inspection schedule. Keene Housing may choose to propose to close out this activity in its FY 2020 MTW Plan.

## Benchmarks and Outcomes

### CE #1: Agency Cost Savings

| Unit of Measurement                       | Baseline 2010 | Benchmark | Outcome | Benchmark Achieved? |
|---|---------------|-----------|---------|---------------------|
| Total cost of task in dollars (decrease). | \$11,854      | \$9,048   | \$7,898 | Yes                 |

### CE #2: Staff Time Savings

| Unit of Measurement  | Baseline 2010 | Benchmark | Outcome | Benchmark Achieved? |
|--|---------------|-----------|---------|---------------------|
| Total time to complete the task in staff hours (decrease). | 545           | 416       | 429     | No                  |

## Keene Housing Local Metric(s)

In addition to the required metric(s) developed by HUD, KH also utilizes the following local metric(s) to monitor program efficacy.

### KH: Self-Certification Inspections

| Unit of Measurement                            | Baseline 2013 | Benchmark | Outcome | Benchmark Achieved? |
|--|---------------|-----------|---------|---------------------|
| Number of inspections by landlords (increase). | 0             | 5         | 0       | No                  |

### KH: HQS Quality Control

| Unit of Measurement   | Baseline 2013 | Benchmark | Outcome | Benchmark Achieved? |
|---|---------------|-----------|---------|---------------------|
| Number of self-certified units failing HQS Quality Control inspection (decrease). | 0             | 0         | 0       | Yes                 |

**1999.03.CE RENT REASONABLENESS NEIGHBORHOOD ANALYSIS DISCONTINUANCE**

*Plan Year Approved: 2000    Year Implemented: 2000*

Under the traditional HCV program, each Public Housing Authority (PHA) is required to develop and maintain a database of rental units in the PHA's jurisdiction. The development of this database often requires extensive administrative time and experience surveying existing rental units based on unit size, neighborhood, and amenities provided. In addition, the database must be updated annually in coordination with HUD's release of Fair Market Rents. KH found that the annual maintenance of this data tended to be administratively demanding with very little return, as the Monadnock region's rental market is incredibly tight with little variance from neighborhood to neighborhood or town to town. As it is KH's belief that the household, not KH, is the best judge of what an appropriate rent is (see 40% Affordability Elimination activity on page 28), KH determined that the annual neighborhood analysis for rent reasonableness was unnecessary and discontinued the practice in 2000.

**Benchmarks and Outcomes***CE #1: Agency Cost Savings*

| Unit of Measurement                       | Baseline<br>2010 | Benchmark | Outcome | Benchmark<br>Achieved? |
|---|------------------|-----------|---------|------------------------|
| Total cost of task in dollars (decrease). | \$470            | \$0       | \$0     | Yes                    |

*CE #2: Staff Time Savings*

| Unit of Measurement  | Baseline<br>2010 | Benchmark | Outcome | Benchmark<br>Achieved? |
|--|------------------|-----------|---------|------------------------|
| Total time to complete the task in staff hours (decrease). | 19               | 0         | 0       | Yes                    |

## 1999.07.HC REASONABLE RENT DETERMINATION DISCONTINUANCE

*Plan Year Approved: 2000    Year Implemented: 2000*

Based on the region's housing market, economic environment, and rural nature, KH believes that the determination of a rent's reasonableness should be the household's decision according to the household's priorities, income, and needs. For this reason, KH does not test any unit for rent reasonableness nor negotiate rents or hold contracts with private owners.

During the issuance briefing, KH staff educates applicants on how factors relating to rent reasonableness – such as location, unit size, unit type, accessibility, amenities, tenant paid utilities, and maintenance – contribute towards a reasonable rent. The education and support provided by KH continues throughout the applicant's housing search and during their rent negotiations with prospective owners.

Since KH first proposed this activity, we have seen a significant increase in the number of households we serve that are elderly or disabled. Due to their unique needs, many find it difficult to locate affordable housing with needed amenities in the area's tight housing market. In addition, many of our new Stepped Subsidy participants lack the needed skills to determine what is a reasonable rent. We have proposed to re-institute the rent reasonableness calculation for our participants who are elderly, disabled, or entering in Step 1 of the Stepped Subsidy program as part of our Amended FY2018 MTW Plan.

Pursuant to our Amended FY18 MTW Plan, Keene Housing amended this activity necessitating a revision to the metrics to better match the measured outcomes. HUD Metric CE#6: Reducing Per Unit Subsidy Costs for Participating Households replaces CE#1 Agency Cost Savings. The new baseline and benchmark are based on 2018 data.

### Benchmarks and Outcomes

#### *CE #6: Reducing Per Unit Subsidy Costs for Participating Households*

| Unit of Measurement   | Baseline<br>2018 | Benchmark | Outcome | Benchmark<br>Achieved? |
|---|------------------|-----------|---------|------------------------|
| Average amount of Section 8 and/or 9 subsidy, (or local, non-traditional subsidy) per household affected by this policy in dollars (decreased). | \$638            | \$630     | \$0     | Yes                    |

## Keene Housing Local Metric(s)

In addition to the required metric(s) developed by HUD, KH also utilizes the following local metric(s) to monitor program efficacy.

*KH: Percentage of Rent Burdened Households (excluding Stepped Subsidy Households\*)*

| Unit of Measurement   | Baseline | Benchmark | Outcome | Benchmark Achieved? |
|---|----------|-----------|---------|---------------------|
| Percentage of households with a rent burden above 40% gross monthly income. | 0        | 5%        | 5%      | Yes                 |

*\*Rent burden of households participating in the Stepped Subsidy program can be found under the Stepped Subsidy activity (page 24).*

## 1999.08.HC 40% AFFORDABILITY DISCONTINUANCE

*Plan Year Approved: 2000    Year Implemented: 2000*

KH believes the best judge of what a household's priorities are in relation to housing is a well-informed household. In our first MTW Plan, KH eliminated the 40% affordability rule in its MTW programs. Instead, households are counseled during the issuance briefing on acceptable rent burdens relative to rent reasonableness and the consequences of choosing units that create high rent burdens. Once a unit is chosen, KH calculates the household's proposed rent burden and, if it exceeds 40%, KH allows the household the opportunity to demonstrate that they can manage the higher rent burden. Households who choose a high rent burden are not eligible for Safety Net unless a change in circumstances causes their rent burden to exceed their rent burden at lease-up.

Keene Housing made no significant changes to this activity and no changes were made to the metrics and data collection.

## Benchmarks and Outcomes

*CE #1: Agency Cost Savings*

| Unit of Measurement                       | Baseline 2010 | Benchmark | Outcome | Benchmark Achieved? |
|---|---------------|-----------|---------|---------------------|
| Total cost of task in dollars (decrease). | \$470         | \$0       | \$0     | Yes                 |

*CE #2: Staff Time Savings*

| Unit of Measurement  | Baseline<br>2010 | Benchmark | Outcome | Benchmark<br>Achieved? |
|--|------------------|-----------|---------|------------------------|
| Total time to complete the task in staff hours (decrease). | 19               | 0         | 0       | Yes                    |

**Keene Housing Local Metric(s)**

In addition to the required metric(s) developed by HUD, KH also utilizes the following local metric(s) to monitor program efficacy.

*KH: Percentage of Rent Burdened Households (excluding Stepped Subsidy Households\*)*

| Unit of Measurement   | Baseline | Benchmark | Outcome | Benchmark<br>Achieved? |
|---|----------|-----------|---------|------------------------|
| Percentage of households with a rent burden above 40% gross monthly income. | 0%       | 5%        | 5%      | Yes                    |

\*Rent burden of households participating in the Stepped Subsidy program can be found under the Stepped Subsidy activity (page 24).

**1999.04.CE STEPPED SUBSIDY RENT REFORM**

*Plan Year Approved: 2000    Year Implemented: 2000*

The Stepped Subsidy activity introduced a three (3) stepped subsidy structure for all work-able and interested elderly/disabled families. All households receiving assistance under Stepped Subsidy are required to participate in the Resident Self-Reliance (RSR) program (page 32). Rather than paying 30% of adjusted income for rent, residents pay only 20% of gross income towards rent in the first two years. After two years the subsidy is reduced at Year 3 to 65% of the Voucher Payment Standard (VPS) for which they are eligible, and again at Year 4 to 45% of VPS (see table below).

*Table 4. 2018 Voucher Payment Standard by Bedroom Size and Step Subsidy Level*

| # BR | VPS    | Step 1 HAP                     | Step 2 HAP<br>(65% of VPS) | Step 3+ HAP<br>(45% of VPS) |
|------|--------|--------------------------------|----------------------------|-----------------------------|
| SRO  | \$597  | VPS-20% Gross Income = Subsidy | \$390                      | \$270                       |
| 0    | \$797  | VPS-20% Gross Income = Subsidy | \$520                      | \$360                       |
| 1    | \$868  | VPS-20% Gross Income = Subsidy | \$560                      | \$390                       |
| 2    | \$1118 | VPS-20% Gross Income = Subsidy | \$730                      | \$500                       |
| 3    | \$1455 | VPS-20% Gross Income = Subsidy | \$950                      | \$650                       |
| 4    | \$1623 | VPS-20% Gross Income = Subsidy | \$1050                     | \$730                       |

In 2018, 187 households participated in Stepped Subsidy with 14 (7%) moving out of housing assistance and into self-sufficiency.

## Hardship Requests and Outcomes

KH administers a hardship program, Safety Net, for all MTW PBV and HCV households. The Safety Net program provides temporary relief to participating households experiencing significant, unexpected increases in rent burden. As Safety Net is not meant to take the place of employment for Stepped Subsidy households. As such applications for Safety Net must be submitted monthly except in limited situations, such as an extended medical leave.

The Safety Net Committee may require a Safety Net applicant to complete an action plan to remedy the hardship, such as applying for unemployment benefits, as one of the requirements for receiving additional housing assistance. Repeat Safety Net recipients, may also be required to revisit their Three Year Action Plan for RSR (page 33) with their Resident Services Coordinator (RSC).

In 2018, KH received 20 Safety Net applications. Of those, 68% (13) were approved and 32% (6) were denied.

## Benchmarks and Outcomes

### CE #1: Agency Cost Savings

| Unit of Measurement                       | Baseline 1999 | Benchmark | Outcome | Benchmark Achieved? |
|---|---------------|-----------|---------|---------------------|
| Total cost of task in dollars (decrease). | \$12,162      | \$3,832   | \$2,381 | Yes                 |

### CE #2: Staff Time Savings

| Unit of Measurement  | Baseline 1999 | Benchmark | Outcome | Benchmark Achieved? |
|--|---------------|-----------|---------|---------------------|
| Total time to complete the task in staff hours (decrease). | 492           | 155       | 104     | Yes                 |

## Keene Housing Local Metric(s)

In addition to the required metric(s) developed by HUD, KH also utilizes the following local metric(s) to monitor program efficacy.

### KH: Percentage of Rent Burdened Households

| Unit of Measurement  | Baseline | Benchmark | Outcome | Benchmark Achieved? |
|--|----------|-----------|---------|---------------------|
| Percentage of households suffering a rent burden above 40% gross monthly income. | 0        | 5%        | 5%      | Yes                 |

## Challenges to Achieving Benchmarks

Households making education and job training commitments are often unable to maintain a positive trajectory in their income and become rent burdened when a step change occurs. In response, KH implemented a change to the Stepped Subsidy program in 2018 which freezes a participant's subsidy while pursuing educational goals. No changes were made to the metrics and data collection.

## 2013.01.SS \$0 HAP RENT BURDEN TEST

*Plan Year Approved: 2013    Year Implemented: 2013*

KH uses a rent burden test to measure a household's progress towards economic independence. When a Stepped Subsidy household's gross rent burden is at or below 30% of their gross income, KH reduces HAP to \$0 for 6 months. If the household does not experience an unanticipated change in income within the \$0 HAP period, housing assistance is terminated. This change helped better align the metrics for measuring self-sufficiency with those used for hardship in the Safety Net program.

Keene Housing made no significant changes to this activity and no changes were made to the metrics and data collection.

### Benchmarks and Outcomes

*SS #8: Households Transitioned to Self-Sufficiency*

| Unit of Measurement   | Baseline | Benchmark | Outcome | Benchmark Achieved? |
|---|----------|-----------|---------|---------------------|
| Number of Households transitioned into self sufficiency (increase). | 1        | 2         | 14      | Yes                 |

## 1999.05.SS RESIDENT SELF-RELIANCE (RSR) PROGRAM

*Plan Year Approved: 2000    Year Implemented: 2000*

The RSR program provides service coordination and case management to help families become financially stable. The program is required for all non-elderly, non-disabled households enrolled in the Stepped Subsidy program. Elderly and Disabled households that elect to enroll in the Stepped Subsidy program are also required to participate in the program.

Upon issuance, RSR participants complete an assessment to determine potential barriers to self-sufficiency and financial stability based upon the following five (5) Foundational Proficiencies:

- Household Stability
- Wellness and Healthy Relationships
- Education and Training
- Financial Management
- Employment and Household Management
- Individualized Goal Setting Plans

Within ninety (90) days of lease-up, new participants meet with a Resident Service Coordinator (RSC) for an assessment session. The assessment session helps identify the Foundational Proficiencies in which the household needs the most support. The assessment session is followed by a goal-setting session where participants develop an individualized 3-year plan to attain competencies in the Foundational Proficiencies where the household needs support. The plan includes specific goals and milestones with dates for completion. Participants are encouraged to consider, and set goals to mitigate, the stepped rent increases that come with participation in the Stepped Subsidy activity.

All households are required to have an active 3-year plan as long as they are receiving housing assistance through the Stepped Subsidy program. Upon completion of a 3-year Goal Action Plan, each participant establishes a new 3-year plan with their RSC.

### **Development Grants and Rent Credits**

Keene Housing understands that cost is often a major barrier to low-income households' educational and professional success. In an effort to provide the best chance for our participants to reach their goals, Keene Housing offers Development Grants to help offset costs associated with attaining goals within a household's 3-year Goal Action Plan. The grant fund is renewed annually with the amount of the grant determined by funding availability. Examples of Development Grant approved uses include help with tuition, textbooks, exams, childcare and transportation.

In addition, participants can choose to use their Development Grant funds for Rent Credits when they meet established milestones or goals. The amount of the Rent Credit varies with the significance of a participant's achievement and the amount of funds left in the household's annual Development Grant fund. Both Development Grants and Rent Credits are available to all RSR participants and are contingent upon funding availability.

### Participant Compliance

KH requires RSR participants to attend quarterly one-on-one RSC progress meetings. Participants who miss three (3) progress meetings with their RSC are terminated from the RSR and Stepped Subsidy programs. In addition to the quarterly meetings, participants are encouraged to pursue round table sessions and other seminars relevant to their future plans even if not directly tied to a current goal. Keene Housing made no significant changes to this activity and no changes were made to the metrics and data collection.

### Benchmarks and Outcomes

#### *SS #1: Increase in Household Income*

| Unit of Measurement  | Baseline 2015 | Benchmark | Outcome  | Benchmark Achieved? |
|--|---------------|-----------|----------|---------------------|
| Average earned income of households affected by this policy in dollars (increase). | \$23,597      | \$24,500  | \$27,200 | Yes                 |

## SS #3: Increase in Positive Outcomes in Employment Status

NOTE: Prior to 2018, Keene Housing considered a household employed full-time if the reported annual gross income met or exceeded the \$15 per hour living wage established for Cheshire County by the Monadnock Living Wage Group. Beginning in January 2018, Keene Housing revised the RSR Program requiring RSR participants to submit third party verification of earned income quarterly.

| Unit of Measurement                      | Baseline 2015 | Benchmark | Outcome | Benchmark Achieved? |
|--|---------------|-----------|---------|---------------------|
| The number of head of households:        |               |           |         |                     |
| (1) Employed Full-Time                   | 26            | 34        | 90      | Yes                 |
| (2) Employed Part-Time                   | 83            | 83        | 29      | No                  |
| (3) Enrolled in an Educational Program   | 6             | 6         | 8       | Yes                 |
| (4) Enrolled in Job Training Program     | 4             | 4         | 2       | No                  |
| (5) Unemployed                           | 18            | 10        | 13      | No                  |
| (6) Other                                | 0             | 0         | 0       | 0                   |
| The percentage of work-able households:* |               |           |         |                     |
| (1) Employed Full-Time                   | 23%           | 27%       | 68%     | Yes                 |
| (2) Employed Part-Time                   | 65%           | 65%       | 22%     | No                  |
| (3) Enrolled in an Educational Program   | 5%            | 5%        | 8%      | Yes                 |
| (4) Enrolled in Job Training Program     | 3%            | 3%        | 2%      | No                  |
| (5) Unemployed                           | 14%           | 8%        | 10%     | No                  |
| (6) Other                                | 0%            | 0%        | 0%      | Yes                 |

\* May not equal 100% as some individuals may be working and attending an educational or job training program.

## Approved MTW Activities

### *SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)*

| Unit of Measurement  | Baseline 2013 | Benchmark | Outcome | Benchmark Achieved? |
|--|---------------|-----------|---------|---------------------|
| Number of households receiving TANF assistance (decrease). | 5             | 6         | 7       | No                  |

### *SS #5: Households Assisted by Services that Increase Self-Sufficiency*

| Unit of Measurement  | Baseline 2013 | Benchmark | Outcome | Benchmark Achieved? |
|--|---------------|-----------|---------|---------------------|
| Number of households receiving services aimed to increase self-sufficiency (increase). | 110           | 110       | 156     | Yes                 |

### *SS#8: Households Transitioned into Self-Sufficiency*

| Unit of Measurement   | Baseline 2013 | Benchmark | Outcome | Benchmark Achieved? |
|---|---------------|-----------|---------|---------------------|
| Number of households transitioned to self-sufficiency (increase). | 14            | 10        | 14      | Yes                 |

### **Keene Housing Local Metric(s)**

In addition to the required metric(s) developed by HUD, KH also utilizes the following local metric(s) to monitor program efficacy.

### *KH: Households with earned income*

| Unit of Measurement  | Baseline 2015 | Benchmark | Outcome | Benchmark Achieved? |
|--|---------------|-----------|---------|---------------------|
| Percentage of households reporting earned income (increase). | 86%           | 90%       | 95%     | Yes                 |

## Approved MTW Activities

### *KH: Households making progress on Three-Year Action Plan*

| Unit of Measurement   | Baseline 2013 | Benchmark | Outcome | Benchmark Achieved? |
|---|---------------|-----------|---------|---------------------|
| Number of households receiving rent credits for meeting Action Plan goals (increase). | 0             | 25        | 65      | Yes                 |

### *KH: Households terminated for non-compliance*

| Unit of Measurement  | Baseline 2013 | Benchmark | Outcome | Benchmark Achieved? |
|--|---------------|-----------|---------|---------------------|
| Number of households terminated for failure to attend quarterly meetings (decrease). | 0             | 2         | 0       | Yes                 |

### *KH: Households awarded a Development Grant or Rent Credit*

| Unit of Measurement  | Baseline 2013 | Benchmark | Outcome | Benchmark Achieved? |
|--|---------------|-----------|---------|---------------------|
| Number of households that received Development Grant and Rent Credit funds (increase). | 0             | 25        | 103     | Yes                 |

### *KH: Total DGRC Funds Distributed*

| Unit of Measurement  | Baseline 2013 | Benchmark | Outcome  | Benchmark Achieved? |
|--|---------------|-----------|----------|---------------------|
| Total amount of Development Grant and Rent Credit funds awarded to eligible households (increase). | 0             | \$16,000  | \$28,818 | Yes                 |

## 1999.06.HC TRANSITIONAL HOUSING ASSISTANCE SHELTER PROGRAM (THASP)

*Plan Year Approved: 2000    Year Implemented: 2000*

Keene Housing began providing sponsor-based subsidies to local service provider partners for shelter and transitional housing during its first year in MTW. THASP focuses on helping households most PHAs find hard to assist: those facing immediate and/or long term homelessness, individuals returning to the community from incarceration, and victims of domestic violence fleeing their abusers.

Through most of FY2018, KH provided sponsor-based subsidies for 4 transitional housing programs:

| Property Name                            | Service Provider                         | Program Description                                    |
|--|--|--|
| Water Street Family Shelter              | Southwestern Community Services          | Year-round homeless shelter for families with children |
| Roxbury Street Men's Shelter             | Southwestern Community Services          | Year-round homeless shelter for men                    |
| Second Chance for Success                | Southwestern Community Services          | Transitional housing for men leaving incarceration     |
| Monadnock Center for Violence Prevention | Monadnock Center for Violence Prevention | Shelter for victims of domestic violence               |

In February of 2018, Southwestern Community Services closed Second Chance for Success.

The benchmark and outcomes have been reported using cumulative totals. In 2018 our partner was able to provide the number of individuals served through THASP. Moving forward, Keene Housing will use this method of reporting. No changes were made to the metrics.

## Benchmarks and Outcomes

### *SS #5: Households Assisted by Services that Increase Self-Sufficiency*

| Unit of Measurement  | Baseline 1999 | Benchmark | Outcome | Benchmark Achieved? |
|--|---------------|-----------|---------|---------------------|
| Number of households receiving services aimed to increase self-sufficiency (increase). | 0             | 166       | 166     | Yes                 |

### *HC#1: Additional Units of Housing Made Available*

| Unit of Measurement   | Baseline 1999 | Benchmark | Outcome | Benchmark Achieved? |
|---|---------------|-----------|---------|---------------------|
| Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). | 0             | 60        | 39      | No                  |
| <b>Households Served:</b><br>Homeless and hard-to-house.  |               |           |         |                     |

### *CE #4: Increase in Resources Leveraged*

| Unit of Measurement                              | Baseline 1999 | Benchmark | Outcome   | Benchmark Achieved? |
|--|---------------|-----------|-----------|---------------------|
| Amount of funds leveraged in dollars (increase). | \$0           | \$250,000 | \$268,624 | Yes                 |

### *HC #7: Households Assisted by Services that Increase Housing Choice*

| Unit of Measurement  | Baseline 1999 | Benchmark | Outcome | Benchmark Achieved? |
|--|---------------|-----------|---------|---------------------|
| Number of households receiving services aimed to increase housing choice (increase). | 0             | 425       | 0       | No                  |

### **2005.01.CE ELDERLY AND DISABLED HOUSEHOLD ALTERNATIVE RECERTIFICATION SCHEDULE**

*Plan Year Approved: 2005    Year Implemented: 2005*

Keene Housing does not require elderly and disabled households to participate in the annual recertification process if they do not have net assets exceeding \$50,000 and receive 100% of their income from any fixed income source including, but not limited to:

- Disability Compensation and/or Dependency and Indemnity Compensation (DIC) payments, received from the Veteran's Administration (VA);
- Federal, State, local, and private pension plans that provide substantially the same amount year to year; and
- Other regular payments received from annuities, disability or death benefits, insurance policies, retirement funds, and other similar types of income that provide substantially the same amount year to year.

Instead, KH relies on the published Cost of Living Adjustment (COLA) and the Enterprise Income Verification (EIV) system to calculate each household's income. KH notifies households via mail of their new tenant share and subsidy amount. Included with this notice is the standard Authorization for Release of Information/Privacy Act Notice (HUD form 9886). Households with pension and assets above \$50,000 continue to participate in the regular full annual recertification process.

Keene Housing understands the value of regular contact with HCV participants, particularly elderly and disabled participants, yet the recertification process for many elderly and disabled households can be quite confusing and stressful. To maintain contact with participants in a more productive manner, we hired an Elderly/Disabled Resident Service Coordinator in 2017 to develop the Community Connections program. Community Connections focuses on helping our elderly and disabled residents maintain an active and healthy lifestyle. Our hope is that using proven strategies to facilitate aging in community and aging in place allows our residents to remain independent well into their senior years.

Keene Housing made no significant changes to this activity and no changes were made to the metrics and data collection.

**Benchmarks and Outcomes***CE #1: Agency Cost Savings*

| Unit of Measurement                       | Baseline 2015 | Benchmark | Outcome | Benchmark Achieved? |
|---|---------------|-----------|---------|---------------------|
| Total cost of task in dollars (decrease). | \$10,968      | \$11,448  | \$6,285 | Yes                 |

*CE #2: Staff Time Savings*

| Unit of Measurement  | Baseline 2015 | Benchmark | Outcome | Benchmark Achieved? |
|--|---------------|-----------|---------|---------------------|
| Total time to complete the task in staff hours (decrease). | 457           | 477       | 397     | Yes                 |

*CE #5: Increase in Agency Rental Revenue*

| Unit of Measurement                   | Baseline 2015 | Benchmark | Outcome  | Benchmark Achieved? |
|---------------------------------------|---------------|-----------|----------|---------------------|
| Rental revenue in dollars (increase). | \$129,716     | \$129,716 | \$92,886 | No                  |

**2005.02.CE STEPPED SUBSIDY ALTERNATIVE RECERTIFICATION SCHEDULE**

*Plan Year Approved: 2005    Year Implemented: 2005*

Households participating in the Stepped Subsidy program currently participate in a recertification at each step change. Upon reaching Step 3, Stepped Subsidy households do not participate in full recertifications.

During years when a household does not have a recertification, KH conducts an Enterprise Income Verification (EIV) system check to test whether or not the household meets the \$0 HAP threshold and is still income eligible. In addition, as all Stepped Subsidy households also participate in RSR (page 32) and are required to attend quarterly meetings with their RSC; third party verified income and employment data are collected at these meetings. The information collected is used to measure each household's progress towards their 3-Year Goal Action Plan and for evaluating program efficacy. In addition, RSCs collect a new Authorization for Release of Information/Privacy Act Notice (HUD form 9886) when existing 9886s have expired.

The outcomes for this activity reflect the increase in number of households served and what Step subsidy level for which the household is eligible. The number of families participating in the RSR program grew from eighty-three (83) in 2015 to two-hundred and sixteen (216) in 2018 (includes households exited in 2018). The decrease in rental revenue is attributed to the fact that most families enter the RSR Program on Step 1 receiving the steepest subsidy. There were thirty-nine new lease-ups in 2018, twenty-six (26) on Step 1, ten (10) on Step 2, and three (3) on Step 3.

Keene Housing made no significant changes to this activity and no changes were made to the metrics and data collection.

**Benchmarks and Outcomes***CE #1: Agency Cost Savings*

| Unit of Measurement                       | Baseline<br>2015 | Benchmark | Outcome | Benchmark<br>Achieved? |
|---|------------------|-----------|---------|------------------------|
| Total cost of task in dollars (decrease). | \$3,384          | \$4,680   | \$5,148 | No                     |

*CE #2: Staff Time Savings*

| Unit of Measurement  | Baseline<br>2015 | Benchmark | Outcome | Benchmark<br>Achieved? |
|--|------------------|-----------|---------|------------------------|
| Total time to complete the task in staff hours (decrease). | 141              | 195       | 234     | No                     |

*CE #5: Increase in Agency Rental Revenue*

| Unit of Measurement                   | Baseline 2015 | Benchmark | Outcome  | Benchmark Achieved? |
|---------------------------------------|---------------|-----------|----------|---------------------|
| Rental revenue in dollars (increase). | \$60,262      | \$60,262  | \$58,060 | No                  |

**2008.01.HC PROJECT BASED VOUCHER PROGRAM***Plan Year Approved: 2008    Year Implemented: 2008*

KH continues operating its local Project Based Voucher (PBV) program, initially approved in 2008. This activity permits Keene Housing to waive regulatory caps on the total HCV inventory KH may project base. KH project bases at least 75% of its available voucher funding plus any funding received for units project based through the AHPP activity. In addition, this activity allows KH to waive the required public process for project basing units within KH owned and managed properties and eliminate the limitations on the percentage of units within a single property or development that may be project based.

Keene Housing made no significant changes to this activity and no changes were made to the metrics and data collection.

**Benchmarks and Outcomes***HC #4: Displacement Prevention*

| Unit of Measurement   | Baseline 2007 | Benchmark | Outcome | Benchmark Achieved? |
|---|---------------|-----------|---------|---------------------|
| Number of households at or below 80% AMI that would lose assistance or need to move (decrease). | 212           | 0         | 331     | No                  |

**2008.02.CE RESTRICTIONS ON SECTION 8 PORTABILITY***Plan Year Approved: 2008    Year Implemented: 2008*

KH restricts non-elderly, non-disabled households from porting out of our jurisdiction to those households who require a reasonable accommodation unavailable in KH's jurisdiction, are the victims of domestic violence, or can show the move would demonstrably increase their financial stability, such as a new employment or educational opportunity.

**Benchmarks and Outcomes***CE #1: Agency Cost Savings*

| Unit of Measurement                       | Baseline 2013 | Benchmark | Outcome | Benchmark Achieved? |
|---|---------------|-----------|---------|---------------------|
| Total cost of task in dollars (decrease). | \$288         | \$408     | \$198   | Yes                 |

*CE #2: Staff Time Savings*

| Unit of Measurement  | Baseline 2013 | Benchmark | Outcome | Benchmark Achieved? |
|--|---------------|-----------|---------|---------------------|
| Total time to complete the task in staff hours (decrease). | 12            | 17        | 9       | Yes                 |

**2014.01.HC AFFORDABLE HOUSING PRESERVATION PROGRAM (AHPP)**

*Plan Year Approved: 2014    Year Implemented: 2015*

KH proposed and received approval for our Affordable Housing Preservation Program (AHPP) in 2014. Building on the successes of similar initiatives at other MTW Agencies, the program leverages the subsidy provided by the Enhanced Voucher program (Section 8(t) of the U.S. Housing Act) to preserve properties that would otherwise either be removed from HUD's multifamily portfolio.

AHPP accomplishes this by providing property owners the option to opt-out of an expiring Project Based Section 8 contract and convert their properties to PBVs with KH. As vouchers can sometimes provide higher payments than Multifamily contracts, entering into a PBV HAP contract can provide owners access to additional rental revenue and private equity for capital improvements. Additionally, moving from Project Based Section 8 to PBV frees owners from HUD Management Reviews (MOR) as well as restrictions on reserve capitalization and use. KH provides residents the option of remaining in place and converting their Enhanced Voucher to a PBV or taking their Enhanced Voucher to the private market at which time KH will, in most cases, provide a PBV for the vacant unit.

In 2015, KH chose Meadow Road, a KH owned Multifamily Section 8 property, as the first property to convert under this new initiative.

Keene Housing made no significant changes to this activity and no changes were made to the metrics and data collection.

## Benchmarks and Outcomes

### HC#2: Units of Housing Preserved

| Unit of Measure  | Baseline | Benchmark | Outcome | Benchmark Achieved? |
|--|----------|-----------|---------|---------------------|
| Number of housing units preserved for households at or below 80% AMI as a result of the activity (increase). | 0        | 18        | 0       | No                  |

### HC#4: Displacement Prevention

| Unit of Measure   | Baseline | Benchmark | Outcome | Benchmark Achieved? |
|---|----------|-----------|---------|---------------------|
| Number of households at or below 80% AMI that would lose assistance or need to move (decrease). | 18       | 0         | 0       | Yes                 |

## Challenges to Achieving Benchmarks

Keene Housing did not add any new properties to its AHPP program in 2017.

## 2014.02.CE MEDICAL DEDUCTION THRESHOLD

*Plan Year Approved: 2014    Year Implemented: 2014*

Under the traditional medical deduction calculation, households may claim unreimbursed medical expenses up to 3% of their annual income as a deduction towards their adjusted annual income calculation. Keene Housing found that most households either did not need the exclusion or were using the exclusion to pay for additional, private insurance which would no longer be necessary with the implementation of the Affordable Care Act (ACA). To streamline the recertification process and reduce the amount of federal housing subsidy going to personal insurance, KH increased the threshold for medical deductions to 7.5% for elderly and disabled households' unreimbursed medical expenses.

Keene Housing made no significant changes to this activity and no changes were made to the metrics and data collection.

**Hardship Requests and Outcomes**

KH received no Safety Net applications in 2017 related to this activity.

**Benchmarks and Outcomes***CE#1: Agency Cost Savings*

| Unit of Measure                           | Baseline | Benchmark | Outcome | Benchmark Achieved? |
|---|----------|-----------|---------|---------------------|
| Total cost of task in dollars (decrease). | \$1320   | \$990     | \$2,057 | No                  |

*CE#2: Staff Time Savings*

| Unit of Measure  | Baseline | Benchmark | Outcome | Benchmark Achieved? |
|--|----------|-----------|---------|---------------------|
| Total time to complete the task in staff hours (decrease). | 110      | 96        | 94      | No                  |

*CE #5: Increase in Agency Rental Revenue*

| Unit of Measure                       | Baseline 2015 | Benchmark | Outcome  | Benchmark Achieved? |
|---------------------------------------|---------------|-----------|----------|---------------------|
| Rental revenue in dollars (increase). | \$129,716     | \$129,716 | \$83,562 | No                  |

**2014.02.SS ASSET EXCLUSION THRESHOLD**

*Plan Year Approved: 2014    Year Implemented: 2014*

In 2014, KH adopted a policy to disregard net assets totaling \$50,000 or less from the income calculation when determining a participant's tenant rent. This policy allowed residents the opportunity to establish and increase assets without being discouraged by a corresponding increase in rent. KH continues calculating imputed value for all assets in the income calculation when a household's total net assets exceed \$50,000.

## Hardship Requests and Outcomes

KH received no Safety Net applications in 2018 related to this activity.

## Benchmarks and Outcomes

### CE#1: Agency Cost Savings

| Unit of Measure                           | Baseline 2014 | Benchmark | Outcome | Benchmark Achieved? |
|---|---------------|-----------|---------|---------------------|
| Total cost of task in dollars (decrease). | \$7440        | \$5568    | \$0     | Yes                 |

### CE#2: Staff Time Savings

| Unit of Measure  | Baseline 2014 | Benchmark | Outcome | Benchmark Achieved? |
|--|---------------|-----------|---------|---------------------|
| Total time to complete the task in staff hours (decrease). | 310           | 232       | 0       | Yes                 |

### CE #3: Decrease in Error Rate of Task Execution

| Unit of Measure   | Baseline 2014 | Benchmark | Outcome | Benchmark Achieved? |
|---|---------------|-----------|---------|---------------------|
| Average error rate in completing a task as a percentage (decrease). | 0%            | <1%       | 0%      | Yes                 |

### CE #5: Increase in Agency Rental Revenue

| Unit of Measure                       | Baseline  | Benchmark | Outcome   | Benchmark Achieved? |
|---------------------------------------|-----------|-----------|-----------|---------------------|
| Rental revenue in dollars (increase). | \$189,978 | \$189,978 | \$199,241 | Yes                 |

## Challenges to Achieving Benchmarks

Keene Housing does not collect asset information unless the assets are over the threshold. In 2018 13 households had assets above the \$50,000 threshold.

Keene Housing made no significant changes to this activity and no changes were made to the metrics and data collection.

## 2014.04.SS KEENE HOUSING KIDS COLLABORATIVE (KHKC)

*Plan Year Approved: 2014    Year Implemented: 2014*

For many years Keene Housing operated a relatively small after school and summer program for children living in KH's Forest View and North and Gilsum properties, Building Bridges. Even with a small budget, relatively simple curriculum, and small staff the kids who participate in Building Bridges flourished. Through the Use of Funds authority provided through MTW, Keene Housing created a 501(c) (3) non-profit organization in 2014 that offers wrap-around services to all children living in KH- and KH- affiliate owned and managed properties (all of whom are below 80% AMI), not just those living in units supported through KH's MTW PBV and HCV programs. KH's financial support of KHKC funds declines each year as KHKC increases its fund development activities.

### Benchmarks and Outcomes

Note: While KH provides these metrics as a measure of program efficacy due to HUD requirements, it is important to note that as the activity specifically targets youth, not adults, it is not possible to correlate the program's effectiveness to households that transition to self-sufficiency. KHKC's intent is to help ensure that children growing-up in our properties will be self-sufficient adults, never needing our assistance. As such, the baseline and benchmark for HUD metric SS #8: Households Transitioned to Self-Sufficiency are set to 0. KH respectfully calls attention to this as one of many examples where the 50900 obfuscates, rather than illuminates, an MTW activity's effectiveness or outcomes.

Keene Housing made no significant changes to this activity and no changes were made to the metrics and data collection.

### *SS #5: Households Assisted by Services that Increase Self Sufficiency*

| Unit of Measurement  | Baseline | Benchmark | Outcome | Benchmark Achieved? |
|--|----------|-----------|---------|---------------------|
| Number of households receiving services aimed to increase self-sufficiency (increase). | 10       | 15        | 246     | Yes                 |

### *SS #8: Households Transitioned to Self Sufficiency*

| Unit of Measurement   | Baseline | Benchmark | Outcome | Benchmark Achieved? |
|---|----------|-----------|---------|---------------------|
| Number of households transitioned to self-sufficiency (increase). | 0        | 0         | 0       | Yes                 |

## 2014.03.HC AFFORDABLE HOUSING PRESERVATION & MODERNIZATION PROGRAM

*Plan Year Approved: 2014    Year Implemented: 2014*

In spring of 2014, Keene Housing completed a six-month effort of compiling and aggregating the projected capital needs of the entire KH- and KH-affiliate owned portfolio through 2018. The results were sobering. KH's portfolio would require almost \$3.8M in modernization by 2018.

In the amended FY2014 Plan, KH created the Affordable Housing Preservation and Modernization Program to address these capital needs. The activity allows KH to address the KH- and KH-affiliate owned portfolio's growing capital needs in a rational way, with a predictable schedule, based on greatest need and economies of scale, rather than in reaction to unpredictable and uncertain grant opportunities.

### Benchmarks and Outcomes

#### *HC #2: Units of Housing Preserved*

| Unit of Measurement  | Baseline | Benchmark | Outcome | Benchmark Achieved? |
|--|----------|-----------|---------|---------------------|
| Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase). | 0        | 0         | 222     | Yes                 |

### Keene Housing Local Metric(s)

In addition to the required metric(s) developed by HUD, KH also utilizes the following local metric(s) to monitor program efficacy.

#### *KH: Units of Housing Preserved by 2018 (Rolling metric)*

| Unit of Measurement  | Baseline | Benchmark | Outcome | Benchmark Achieved? |
|--|----------|-----------|---------|---------------------|
| Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase). | 0        | 400       | 888     | Yes                 |

### Challenges to Achieving Benchmarks

Using a combination of MTW and other funds, KH completed \$1,031,950 million in capital improvements in 2018, primarily at North and Gilsum and Harper Acres. This important preservation work is more accurately described as incremental progress towards our long-term preservation goals.

Keene Housing made no significant changes to this activity and no changes were made to the metrics and data collection.

### **2015.01.CE AFFORDABLE HOUSING PRESERVATION PROGRAM - RENT REFORM**

*Plan Year Approved: 2015    Year Implemented: 2015*

The AHPP Rent Reform initiative provides a streamlined methodology for calculating rent while providing households in AHPP properties an opportunity to increase income and assets without experiencing immediate rent increases. As in the traditional PBV program, household subsidy is calculated based on 30% of adjusted annual income. However, the activity alters the current methodology for calculating rent and the recertification schedule with the following streamlining strategies:

- Triennial recertifications for all households.
- Interim recertifications limited to household composition changes and cases where the total household income permanently drops by \$50 per month or more, with access to Safety Net for short term financial hardship.
- The Utility Allowance in effect at the effective date of the last regular recertification used to calculate rents at interim recertifications.
- Household assets with a total net value of \$50,000 or less are disregarded.
- Earned Income Disregard (EID) is eliminated.
- Applies the Elderly and Disabled Household Alternative Recertification Schedule activity (page 40) to all eligible households.

By simplifying the recertification and rent calculation process, the activity reduces KH's administrative burden by lowering administrative costs and staff time. In addition, this policy allows participant households the opportunity to increase earnings and assets without being discouraged from doing so by corresponding increases in rent as is the case in the traditional HCV and public housing programs.

## Hardship Requests and Outcomes

KH received no Safety Net applications in 2018 related to this activity.

Keene Housing made no significant changes to this activity and no changes were made to the metrics and data collection.

## Benchmark and Outcomes

### CE #1: Agency Cost Savings

| Unit of Measurement                       | Baseline*<br>2015 | Benchmark | Outcome | Benchmark<br>Achieved? |
|---|-------------------|-----------|---------|------------------------|
| Total cost of task in dollars (decrease). | \$2326            | \$2088    | \$792   | Yes                    |

### CE #2: Staff Time Savings

| Unit of Measurement  | Baseline*<br>2015 | Benchmark | Outcome | Benchmark<br>Achieved? |
|--|-------------------|-----------|---------|------------------------|
| Total time to complete the task in staff hours (decrease). | 99                | 87        | 54      | Yes                    |

### CE #3: Decrease in Error Rate of Task Execution

| Unit of Measurement   | Baseline*<br>2015 | Benchmark | Outcome | Benchmark<br>Achieved? |
|---|-------------------|-----------|---------|------------------------|
| Average error rate in completing a task as a percentage (decrease). | 0%                | 0%        | 0%      | Yes                    |

## Approved MTW Activities

### *SS #1: Increase in Household Income*

| Unit of Measurement   | Baseline*<br>2015 | Benchmark | Outcome  | Benchmark<br>Achieved? |
|---|-------------------|-----------|----------|------------------------|
| Average earned income of households affected by this policy (increase). | \$9,865           | \$9,964   | \$18,148 | Yes                    |

### *SS #2: Increase in Household Savings*

| Unit of Measurement   | Baseline* | Benchmark | Outcome | Benchmark<br>Achieved? |
|---|-----------|-----------|---------|------------------------|
| Average amount of savings/escrow of households affected by this policy in dollars (increase). | \$15,777  | \$15,935  | \$0     | No                     |

## Approved MTW Activities

### *SS #3: Increase in Positive Outcomes in Employment Status*

NOTE: Keene Housing uses participant provided third-party verification to determine employment status.

| Unit of Measurement                                | Baseline*<br>2015 | Benchmark | Outcome | Benchmark<br>Achieved? |
|--|-------------------|-----------|---------|------------------------|
| Number of Head of Households that are:             |                   |           |         |                        |
| (1) Employed Full-time                             | 5                 | 7         | 10      | Yes                    |
| (2) Employed Part-time                             | 3                 | 2         | 4       | Yes                    |
| (3) Enrolled in an Educational Program             | 0                 | 1         | 0       | No                     |
| (4) Enrolled in a Job Training Program             | 1                 | 1         | 0       | No                     |
| (5) Unemployed                                     | 2                 | 0         | 2       | No                     |
| (6) Other  | 0                 | 0         | 2       | No                     |
| Percentage of total Work-able Households that are: |                   |           |         |                        |
| (1) Employed Full-time                             | 45%               | 64%       | 56%     | No                     |
| (2) Employed Part-time                             | 27%               | 18%       | 22%     | Yes                    |
| (3) Enrolled in an Educational Program             | 0%                | 9%        | 0%      | No                     |
| (4) Enrolled in a Job Training Program             | 10%               | 9%        | 0%      | No                     |
| (5) Unemployed                                     | 18%               | 0%        | 11%     | No                     |
| (6) Other  | 0%                | 0%        | 45%     | No                     |

## Approved MTW Activities

### *SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)*

| Unit of Measurement  | Baseline*<br>2015 | Benchmark | Outcome | Benchmark<br>Achieved? |
|--|-------------------|-----------|---------|------------------------|
| Number of households receiving TANF assistance (decrease). | 1                 | 0         | 2       | No                     |

### *SS #8: Households Transitioned to Self-Sufficiency*

| Unit of Measurement   | Baseline*<br>2015 | Benchmark | Outcome | Benchmark<br>Achieved? |
|---|-------------------|-----------|---------|------------------------|
| Number of households transitioned to self-sufficiency (increase). | 0                 | 2         | 2       | Yes                    |

*\*Baselines calculated using actual number of recertifications/interims done at Meadow Road FY2014.*

### Challenges to Achieving Benchmarks

Keene Housing does not collect asset information from households with assets less than \$50,000.

## **2015.02.CE AFFORDABLE HOUSING PRESERVATION PROGRAM – ALTERNATIVE INSPECTION SCHEDULE**

*Plan Year Approved: 2015    Year Implemented: 2015*

Properties participating in AHPP (page 81) use the following alternative schedule for Housing Quality Standards (HQS) inspections:

- All units converting to AHPP are inspected by the administering agency for HQS compliance no more than 90 days before initial conversion.
- If all units pass initial inspection, the property is subject to biennial HQS inspections of 20% of total units.
- Should any unit fail initial or any other inspection, the property is subject to an annual inspection of 100% of units until all pass HQS inspection, at which time the property returns to a 20% biennial inspection schedule.
- Properties subject to a higher inspection protocol than HQS may use that protocol in lieu of a biennial (not initial) HQS inspection.
- Properties that fail an inspection based upon a higher standard protocol are subject to an annual HQS inspection of all (100%) units until all units pass HQS or a higher inspection protocol.
- A household may, at any time, request a HQS inspection from the administering agency should the tenant believe that their unit does not meet HQS.

Keene Housing made no significant changes to this activity and no changes were made to the metrics and data collection.

**Benchmarks and Outcomes***CE #1: Agency Cost Savings*

| Unit of Measurement                       | Baseline* | Benchmark | Outcome | Benchmark Achieved? |
|---|-----------|-----------|---------|---------------------|
| Total cost of task in dollars (decrease). | \$374     | \$83      | \$324   | No                  |

*CE #2: Staff Time Savings*

| Unit of Measurement  | Baseline* | Benchmark | Outcome | Benchmark Achieved? |
|--|-----------|-----------|---------|---------------------|
| Total time to complete the task in staff hours (decrease). | 18        | 4         | 14      | No                  |

*CE #3: Decrease in Error Rate of Task Execution*

| Unit of Measurement   | Baseline* | Benchmark | Outcome | Benchmark Achieved? |
|---|-----------|-----------|---------|---------------------|
| Average error rate in completing a task as a percentage (decrease). | 0%        | 0%        | 0%      | Yes                 |

**2015.03.CE EARNED INCOME DISREGARD (EID) ELIMINATION**

*Plan Year Approved: 2015      Year Implemented: 2015*

KH discontinued allowing new households to claim the Earned Income Disregard (EID) from the calculation of tenant rent. All households claiming EID as of January 1, 2015 were permitted to do so until the natural end of their EID allowance, as required by regulation. As of the end of 2016, no participants continued to receive an EID allowance.

**Hardship Requests and Outcomes**

KH received no Safety Net applications in 2018 related to this activity.

Keene Housing made no significant changes to this activity and no changes were made to the metrics and data collection.

## Benchmarks and Outcomes

### CE #1: Agency Cost Savings

| Unit of Measurement                       | Baseline | Benchmark | Outcome | Benchmark Achieved? |
|---|----------|-----------|---------|---------------------|
| Total cost of task in dollars (decrease). | \$576    | \$0       | \$0     | Yes                 |

### CE #2: Staff Time Savings

| Unit of Measurement  | Baseline | Benchmark | Outcome | Benchmark Achieved? |
|--|----------|-----------|---------|---------------------|
| Total time to complete the task in staff hours (decrease). | 24       | 0         | 0       | Yes                 |

### CE #3: Decrease in Error Rate of Task Execution

| Unit of Measurement   | Baseline | Benchmark | Outcome | Benchmark Achieved? |
|---|----------|-----------|---------|---------------------|
| Average error rate in completing a task as a percentage (decrease). | 0%       | 0%        | 0%      | Yes                 |

### CE #5: Increase in Agency Rental Revenue

| Unit of Measure                       | Baseline  | Benchmark | Outcome   | Benchmark Achieved? |
|---------------------------------------|-----------|-----------|-----------|---------------------|
| Rental revenue in dollars (increase). | \$225,078 | \$239,310 | \$209,479 | Yes                 |

### **2016.01.CE PROJECT-BASED UNIT AGENCY CONDUCTED INSPECTIONS**

*Plan Year Approved: 2016    Year Implemented: 2016*

Section 8(o)(11) of the 1937 Housing Act and 24 CFR 983.103(f)(1) requires PHAs to contract with a third party inspector for PHA owned PBV units. However, repeated attempts to locate a third party inspector for our owned and managed PBV units have been unsuccessful. The Project-Based Unit Agency Conducted Inspections activity permits KH to waive the third party inspection requirement until such time that an independent inspector can be found.

In lieu of a third party inspector, KH's Director of Facilities and Assets certifies all KH owned and managed Project PBV units to Uniform Physical Condition (UPC) Standards at turnover. In addition, a KH inspector certifies that these units meet Housing Quality Standards (HQS) as specified in KH's MTW HQS activities: 2011.01.CE Housing Quality Standards (HQS) Biennial Inspection Schedule and 2013.01.CE Housing Quality Standards (HQS) Alternative Inspection Protocol. In addition, supervisory personnel who have not been involved in routine inspections monitor the quality of KH's inspections, by re-inspecting five (5%) percent of all initial and annual inspections performed each quarter as a Quality Control (QC) mechanism.

The activity only affects KH's former public housing portfolio as all other KH owned PBV units are inspected at a higher standard by an outside regulatory agency. There is no anticipated impact on KH or residents due to this activity as it makes no change to current practice.

In 2017, we received one response to the RFP. KH awarded a one-year contract to the inspection firm for Quality Control (QC) inspections. The vendor will re-inspect five (5%) percent of all initial and annual inspections performed each quarter as a QC mechanism. If, after the initial contract year, KH is satisfied with the firm's work, in terms of both thoroughness of inspections and customer service, KH may expand the firm's scope of work, pursuant to KH's Board approved procurement policy, to include inspection of all KH and KH affiliate owned PBV units. Should that occur, KH may elect to suspend this activity in the appropriate MTW Plan year.

With HUD's approval of KH's FY2019 MTW Plan, HUD acknowledged that Keene Housing's Moving to Work Agreement C D. 1.f. and D.7.A, gives KH the authority to inspect all KH and KH affiliate owned PBV units. Keene Housing will propose to close-out this activity in its FY2020 MTW Plan.

Keene Housing made no significant changes to this activity and no changes were made to the metrics and data collection.

**Benchmarks and Outcomes***CE #1: Agency Cost Savings*

| Unit of Measurement                       | Baseline 2015 | Benchmark | Outcome | Benchmark Achieved? |
|---|---------------|-----------|---------|---------------------|
| Total cost of task in dollars (decrease). | \$10,279      | \$10,279  | \$149   | Yes                 |

*CE #2: Staff Time Savings*

| Unit of Measurement  | Baseline 2015 | Benchmark | Outcome | Benchmark Achieved? |
|--|---------------|-----------|---------|---------------------|
| Total time to complete the task in staff hours (decrease). | 481           | 481       | 8       | Yes                 |

*CE #3: Decrease in Error Rate of Task Execution*

| Unit of Measure   | Baseline 2015 | Benchmark | Outcome | Benchmark Achieved? |
|---|---------------|-----------|---------|---------------------|
| Average error rate in completing a task as a percentage (decrease). | <1%           | <1%       | <1%     | Yes                 |

**2016.02.HC PROJECT MARCH (MONADNOCK AREA RESOURCES CURING HOMELESSNESS)**

*Plan Year Approved: 2016    Year Implemented: 2016*

Project MARCH utilizes a Housing First model that provides partner agencies fixed subsidies to secure and maintain private market housing for their homeless clients. KH partnered with Southwestern Community Services (SCS), the region's Community Action Agency and our largest THASP partner. KH pledged up to twenty (20) Project MARCH subsidies to SCS for 2016. This commitment expands affordable housing options in the community and provides options beyond the shelters for those who may otherwise find it difficult to secure permanent, affordable housing.

Project MARCH outreach focuses on the region's homeless veteran population, and veterans receive a preference for Project MARCH subsidies throughout the program's life, or until every homeless vet in the Monadnock Region who wants to have housing, does. Every household who receives housing through Project MARCH is also offered two months of intensive supportive services from SCS. SCS continues working with households who request additional assistance after two months.

The Project MARCH partner is responsible for creating and enforcing eligibility and continued occupancy policies. Such policies must, at minimum, meet the following requirements:

- Ensure that no policies or procedures violate any federal, state, or local regulation or statute.
- Certify that no Project MARCH participant has been convicted of drug-related criminal activity for manufacture or production of methamphetamine on the premises of federally assisted housing.
- Require that at least one member of the participating household has established citizenship or eligible immigration status.
- Confirm that all units leased through Project MARCH are meet Housing Quality Standards (HQS) protocols and are subject to KH's HQS quality control protocols.
- Establish that a Project MARCH participant's rent burden cannot exceed 45% of monthly income.
- Certify that no Project MARCH participant's annual income will exceed 80% Area Median Income (AMI) at eligibility.
- Verify that the partner will not impose a time limit for participation but will require Project MARCH participants to apply for housing assistance with KH.

### **Benchmarks and Outcomes**

The following is a list of the metrics KH tracks using HUD's established criteria. As is often the case since the adoption of the most recent 50900, many of the metrics that HUD demands that we track are irrelevant to Project MARCH's design or intended outcomes. In fact, several of the metrics we are required to track, because they measure things that Project MARCH is not designed to affect, give the appearance that Project MARCH is not working; HC #3 Decrease in Wait List Time, SS#6 Reducing per Unit Subsidy Costs for Participating Households and SS #7 Increase in Agency Rental Revenue are the most egregious examples of this.

The metrics marked with a (!) are those that HUD requires us to measure, despite the metrics' inappropriateness and irrelevance. Baselines and benchmarks for most of these metrics are set to zero because they cannot be measured. KH, like HUD, is committed to measuring MTW initiatives' efficacy, and we look forward to working with the Department to improve the 50900 so that it becomes a more useful tool for tracking and evaluating MTW activities.

## Approved MTW Activities

### CE #4: Increase in Resources Leveraged

| Unit of Measurement                              | Baseline 2015 | Benchmark | Outcome | Benchmark Achieved? |
|--|---------------|-----------|---------|---------------------|
| Amount of funds leveraged in dollars (increase). | \$0           | \$8,460   | \$0     | No                  |

### HC #1: Additional Housing Units Made Available

| Unit of Measurement  | Baseline 2015 | Benchmark | Outcome | Benchmark Achieved? |
|--|---------------|-----------|---------|---------------------|
| Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase).<br>Households served: Homeless | 0             | 20        | 6       | No                  |

### HC #3: Decrease in Wait List Time<sup>1</sup>

Project MARCH participants are required to apply for housing assistance with KH as a part of SCS's eligibility screening process. The number of Project MARCH participants is so small as to have no effect on our wait lists. There is no reason whatsoever to track this data relative to Project MARCH.

| Unit of Measurement                                       | Baseline 2015 | Benchmark | Outcome | Benchmark Achieved? |
|---|---------------|-----------|---------|---------------------|
| Average applicant time on wait list in months (decrease). | 0             | 0         | 0       | Yes                 |

### HC #5: Increase in Resident Mobility

| Unit of Measurement   | Baseline 2015 | Benchmark | Outcome | Benchmark Achieved? |
|---|---------------|-----------|---------|---------------------|
| Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase). | 0             | 20        | 6       | No                  |

## HC #7: Households Assisted by Services that Increase Housing Choice

| Unit of Measurement  | Baseline 2015 | Benchmark | Outcome | Benchmark Achieved? |
|--|---------------|-----------|---------|---------------------|
| Number of households receiving services aimed to increase housing choice (increase). | 0             | 20        | 6       | No                  |

## SS #1: Increase in Household Income <sup>t</sup>

No Project MARCH households are currently served in any KH program or housed in any KH owned or managed unit, therefore no income data is available to establish a baseline nor to establish a realistic benchmark. It is also important to remind the Department that Project MARCH is a Housing First, not self-sufficiency program.

While it is possible, and even likely that participating households see increases in income as a byproduct of being housed and offered supportive services, increasing participant income is not an explicit Project MARCH design element. Additionally, over half of Project MARCH participants are disabled rather than working households.

| Unit of Measurement   | Baseline 2015 | Benchmark | Outcome | Benchmark Achieved? |
|---|---------------|-----------|---------|---------------------|
| Average income of households affected by this policy in dollars (increase). | \$0           | \$0       | \$0     | Yes                 |

### *SS #2: Increase in Household Savings<sup>1</sup>*

No Project MARCH households are currently served in any KH program or housed in any KH owned or managed unit, therefore no savings data is available to establish a baseline nor to establish a realistic benchmark. Project MARCH is a Housing First, not self-sufficiency program, so while it is possible that participating households may see increases in savings, establishing or increasing savings is not an explicit Project MARCH design element. KH also reminds the Department that the first \$50,000 in assets are disregarded when calculating income under the eligibility screening criteria SCS is using, so this data is not tracked except in the extraordinarily unlikely event that a homeless household entering Project MARCH has more than \$50,000 in assets.

| Unit of Measurement  | Baseline<br>2015 | Benchmark | Outcome | Benchmark<br>Achieved? |
|--|------------------|-----------|---------|------------------------|
| Average savings/escrow of households affected by this policy (increase). | \$0              | \$0       | \$0     | Yes                    |

## SS #3: Increase in Positive Outcomes in Employment Status <sup>†</sup>

No Project MARCH households are currently served in any KH program or housed in any KH owned or managed unit, therefore no employment data is available to establish a baseline nor to establish a realistic benchmark. Project MARCH is a Housing First, not self-sufficiency program, so while it is possible that we see changes in employment patterns, increasing employment is not an explicit Project MARCH design element. Further, SCS does not track the data necessary to measure this metric.

| Unit of Measurement                      | Baseline<br>2015 | Benchmark | Outcome | Benchmark<br>Achieved? |
|--|------------------|-----------|---------|------------------------|
| The number of head of households:        |                  |           |         |                        |
| (1) Employed Full- Time                  | 0                | 0         | 0       | Yes                    |
| (2) Employed Part- Time                  | 0                | 0         | 0       | Yes                    |
| (3) Enrolled in an Educational Program   | 0                | 0         | 0       | Yes                    |
| (4) Enrolled in Job Training Program     | 0                | 0         | 0       | Yes                    |
| (5) Unemployed                           | 0                | 0         | 0       | Yes                    |
| (6) Other                                | 0                | 0         | 0       | Yes                    |
| The percentage of work-able households:* |                  |           |         |                        |
| (1) Employed Full- Time                  | 0%               | 0%        | 0%      | Yes                    |
| (2) Employed Part- Time                  | 0%               | 0%        | 0%      | Yes                    |
| (3) Enrolled in an Educational Program   | 0%               | 0%        | 0%      | Yes                    |
| (4) Enrolled in Job Training Program     | 0%               | 0%        | 0%      | Yes                    |
| (5) Unemployed                           | 0%               | 0%        | 0%      | Yes                    |
| (6) Other                                | 0%               | 0%        | 0%      | Yes                    |

\* May not equal 100% as some individuals may be working and attending an educational or job training program.

## SS #5: Households Assisted by Services that Increase Self-Sufficiency

| Unit of Measurement  | Baseline 2015 | Benchmark | Outcome | Benchmark Achieved? |
|--|---------------|-----------|---------|---------------------|
| Number of households receiving services aimed to increase self-sufficiency (increase). | 0             | 20        | 6       | No                  |

## SS #6: Reducing Per Unit Subsidy Costs for Participating Households <sup>†</sup>

No Project MARCH households are currently served in any KH program so it is impossible for there to be a change in the average subsidy per household enrolled in Project MARCH.

| Unit of Measurement  | Baseline 2015 | Benchmark | Outcome | Benchmark Achieved? |
|--|---------------|-----------|---------|---------------------|
| Average amount of Section 8 and/or 9 subsidy per households affected by this policy in dollars (decrease). | \$0           | \$0       | \$0     | Yes                 |

## SS #7: Increase in Agency Rental Revenue

| Unit of Measurement                       | Baseline 2015 | Benchmark | Outcome | Benchmark Achieved? |
|---|---------------|-----------|---------|---------------------|
| PHA rental revenue in dollars (increase). | \$0           | \$0       | \$0     | Yes                 |

## SS #8: Households Transitioned Into Self-Sufficiency <sup>†</sup>

Keene Housing defines self-sufficiency as the point at which a household no longer needs housing assistance. Project MARCH is a Housing-First, not self-sufficiency, program focused on our region's homeless population. While it is possible that some participating households may reach self-sufficiency, self-sufficiency is not an anticipated outcome or goal for Project MARCH participants; moving homeless veterans out of the woods, off of couches, and out of the shelters is the program's goal.

| Unit of Measurement   | Baseline 2015 | Benchmark | Outcome | Benchmark Achieved? |
|---|---------------|-----------|---------|---------------------|
| Number of households transitioned to self sufficiency (increase). | 0             | 0         | 0       | Yes                 |

### Challenges to Achieving Benchmarks

Project MARCH Program utilization remained low (6 households) through the first half of 2018. It was mutually agreed between KH and our partner that due to low program utilization and no predictions of higher utilization, that dissolution of the Program made sense. The Program terminated effective July 31, 2018. All families assisted through the Program received Housing Choice Vouchers and housing search assistance. All families successfully leased-up in place or in another suitable unit of their choice. Keene Housing plans to propose to close-out the Project MARCH activity in its FY2020 MTW Plan.

Keene Housing made no significant changes to this activity and no changes were made to the metrics and data collection.

### **2017.02.HC PBV MOBILITY WAIT LIST**

*Plan Year Approved: 2017    Year Implemented: 2014*

Under HUD regulation 24 CFR 983.260 – Family Right to Move, when issuing tenant-based vouchers PHAs are required to provide them first to project-based voucher (PBV) households who requests one and has fulfilled at least one year of tenancy. However low turnover rates in our tenant based voucher program means that PBV residents are generally eligible for a tenant-based voucher as soon as one becomes available. Under the current regulation each voucher we issued would then go to a household already receiving housing assistance rather than one from our wait list, essentially making residency in a PBV a “requirement” to access a tenant-based voucher.

Keene Housing values housing choice, however we also recognize the need to assist otherwise eligible, unassisted households, who have often waited years for assistance. To balance these two priorities, Keene Housing increased the tenancy requirement for PBV households from one to two years. In addition, we established a ratio whereby every sixth tenant-based voucher issued goes to an eligible PBV household that requests a tenant-based voucher by opting in to our Mobility wait list.

The policies ensure equitable access to housing by households waiting for assistance as well as by assisted households looking to move to the private market. This activity meets the Housing Choice statutory objective and increases the number of units available to all low-income households by ensuring that availability of PBV units are not a barrier to those needing assistance. The activity also reduces wait times by ensuring that those on the wait list are assisted before those already being assisted.

For administrative purposes, all PBV households who applied for our tenant-based wait list prior to the implementation of this policy were automatically moved to the Mobility Wait List in the order of their original application. At lease-up, all PBV households are informed of their right to a tenant-based voucher after two-years of tenancy and given the choice to opt-in to our Mobility Wait List. PBV households may request to be placed on the Mobility wait list at any time.

PBV households are still eligible for transfers within the KH PBV portfolio during the PBV Mobility Wait List tenancy requirements if

such a transfer is approved by the PBV owner. In addition, KH waives the PBV Mobility Wait List requirements for PBV households that meet the eligibility criteria for a tenant-based voucher under KH's Violence Against Women Act (VAWA), Reasonable Accommodation, or Government Displacement/Natural Disaster Preference policies.

### Benchmarks and Outcomes

The following is a list of the metrics KH tracks using HUD's established criteria. As is often the case since the adoption of the most recent 50900, many of the metrics that HUD requires us to track are irrelevant to this activity's design or intended outcomes.

The metrics marked with a (!) are those that HUD requires us to measure, despite the metrics' inappropriateness and irrelevance. Baselines and benchmarks for most of these metrics are set to zero because they cannot be measured. KH, like HUD, is committed to measuring MTW activities' efficacy, and we look forward to working with the Department to improve the 50900 so that it becomes a more useful tool for tracking and evaluating MTW activities.

Keene Housing made no significant changes to this activity and no changes were made to the metrics and data collection.

#### CE#1: Agency Cost Savings <sup>†</sup>

| Unit of Measurement                    | Baseline | Benchmark | Outcome | Benchmark Achieved? |
|--|----------|-----------|---------|---------------------|
| Total Cost in task dollars (decrease). | 0        | 0         | 0       | Yes                 |

#### CE#2: Staff Time Savings <sup>†</sup>

| Unit of Measurement                                    | Baseline | Benchmark | Outcome | Benchmark Achieved? |
|--|----------|-----------|---------|---------------------|
| Total Time to complete task in staff hours (decrease). | 0        | 0         | 0       | Yes                 |

#### HC #3: Decrease in Wait List Time

| Unit of Measurement                                       | Baseline | Benchmark | Outcome | Benchmark Achieved? |
|---|----------|-----------|---------|---------------------|
| Average applicant time on wait list in months (decrease). | 84       | 36        | 24      | Yes                 |

## Not Yet Implemented Activities

### 2017.02.HC LOCAL PAYMENT STANDARD

*Plan Year Approved: 2017*

Like many areas across the country, the Monadnock Region faces low rental vacancy rates and an aging housing stock. These market conditions create a premium for high quality affordable units located close to community resources, like jobs, schools and bus routes. In this environment, owners and developers of multifamily rental units are leasing units at levels significantly higher than HUD's Fair Market Rents (FMRs).

Our inability to, when necessary, establish payment standards in excess of 110% of HUD's FMRs hinders our capacity to increase housing opportunities for those we serve in two ways. First, the 110% payment standard ceiling is making it difficult for some voucher holders to find quality units in neighborhoods close to the resources they need, like jobs, medical providers, shopping and schools. Second, the payment standard ceiling prevents us from providing competitive rents in our Project Based Voucher program, thereby reducing the feasibility of future affordable housing development in the region's most desirable neighborhoods, and impacting the long-term viability of existing affordable housing developments that rely on Project Based Voucher rents keeping pace with the local market to meet their increasing operating expenses.

To remedy these disadvantages, KH will use this activity to set its own Local Payment Standards based on actual market data, rather than HUD's FMRs, using the same Rent Comparability Study methodology used for our HUD Multifamily properties. The Local Payment Standard activity increases the mandated Payment Standard cap to 175% of FMR, waives the requirement to utilize HUD's FMRs when determining the agency's Payment Standards, and allows KH to self-approve rents exceeding its Board-approved VPS, when necessary.

## Benchmarks and Outcomes

### CE #1: Agency Cost Savings

| Unit of Measurement                       | Baseline 2015 | Benchmark | Outcome | Benchmark Achieved? |
|---|---------------|-----------|---------|---------------------|
| Total cost of task in dollars (increase). | \$0           | \$0       | \$0     | Yes                 |

### CE #2: Staff Time Savings

| Unit of Measurement  | Baseline 2015 | Benchmark | Outcome | Benchmark Achieved? |
|--|---------------|-----------|---------|---------------------|
| Total Time to complete the task in staff hours (decrease). | 0             | 0         | 0       | Yes                 |

**Keene Housing Local Metric(s)***Local #1: Additional units of Housing Made Available*

| Unit of Measurement   | Baseline 2015 | Benchmark | Outcome | Benchmark Achieved? |
|---|---------------|-----------|---------|---------------------|
| Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). | 0             | 24        | 37      | Yes                 |

*Local #2: Increase in Resident Mobility*

| Unit of Measurement  | Baseline 2015 | Benchmark | Outcome | Benchmark Achieved? |
|--|---------------|-----------|---------|---------------------|
| Number of household able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase). | 0             | 24        | 0       | No                  |

**Implementation Plan**

As the activity was passed as an amendment to the FY2017 MTW Annual Plan, KH has yet to take action towards implementation of the activity.

**Activities on Hold**

No KH activities are on hold at this time.

**Closed Out Activities****2006.01.CE STANDARD DEDUCTIONS**

*Year Implemented: 2012      Year Closed: 2013*

In 2006, KH adopted a flat deduction for all elderly and/or disabled households. Households who believed their unreimbursed medical expenses were above the 3% medical deduction threshold could request that KH calculate their medical deduction instead of applying the standard deduction.

Since the process of verifying and calculating medical deductions can often be administratively burdensome, it was believed using a flat deduction would provide administrative savings to offset any additional HAP loss that might occur. Delays in implementation resulted in KH being unable to determine the impact of this activity until 2012. Analysis showed that the loss in HAP funds due to households receiving a medical deduction they may not otherwise be eligible for far outweighed any administrative savings.

In 2013, Keene Housing discontinued application of the standard deduction for households with no unreimbursed medical expenses or expenses below the medical deduction threshold as it actually increased agency costs overall.

### 2011.01.CE HOUSING QUALITY STANDARDS (HQS) BIENNIAL INSPECTION SCHEDULE

*Plan Year Approved: 2011    Year Implemented: 2011    Year Closed: 2017*

In 2011 KH transitioned from the annual Housing Quality Standards (HQS) inspections to biennial HQS inspections, including KH-owned and managed properties. KH still conducts an initial inspection of all newly leased units. Any property with a unit that fails an initial, special, quality control, or biennial inspection is held to an annual inspection schedule until such time that all units pass an annual inspection.

Due to changes in 24 CFR982.405 which now permit all public housing authorities to utilize a biennial inspection schedule, KH closed out this activity in FY2017.

### 2011.01.CE HOUSING QUALITY STANDARDS (HQS) BIENNIAL INSPECTION SCHEDULE

#### Outcomes

| MTW Report Year | Outcomes   |
|-----------------|--|
| 2011            | Activity Proposal  |
| 2012            | 694 inspections; 524 placed on biennial inspection cycle; 170 annual cycle; 3 units failing HQS QC. Landlords conducted 42 annual inspections in 2012. |

## MTW Report Year

2013

## Outcomes

KH reworked the number of inspections conducted annually by staff to follow HUDs new standard metrics and reported under the agency cost savings and staff time savings metrics.

### CE #1: Agency Cost Savings

| Unit of Measurement                       | Benchmark | Outcome | Benchmark Achieved? |
|---|-----------|---------|---------------------|
| Total cost of task in dollars (decrease). | \$7,251   | \$5,976 | Yes                 |

### CE #2: Staff Time Savings

| Unit of Measurement                                  | Benchmark | Outcome | Benchmark Achieved? |
|--|-----------|---------|---------------------|
| Time to complete the task in staff hours (decrease). | 416       | 288     | Yes                 |

### CE #3 : Decrease in Error Rate of Task Execution

| Unit of Measurement   | Benchmark | Outcome | Benchmark Achieved? |
|---|-----------|---------|---------------------|
| Average error rate in completing a task as a percentage (decrease). | <1%       | <1%     | Yes                 |

## Keene Housing Local Metric(s)

### KH: Self-Certification Inspections

| Unit of Measurement                            | Benchmark | Outcome | Benchmark Achieved? |
|--|-----------|---------|---------------------|
| Number of inspections by landlords (increase). | 5         | 0       | No                  |

## Approved MTW Activities

### MTW Report Year

2014

### Outcomes

#### CE #1: Agency Cost Savings

| Unit of Measurement                       | Benchmark | Outcome | Benchmark Achieved? |
|---|-----------|---------|---------------------|
| Total cost of task in dollars (decrease). | \$9,048   | \$3,258 | Yes                 |

#### CE #2: Staff Time Savings

| Unit of Measurement                                  | Benchmark | Outcome | Benchmark Achieved? |
|--|-----------|---------|---------------------|
| Time to complete the task in staff hours (decrease). | 416       | 157     | Yes                 |

#### CE #3 : Decrease in Error Rate of Task Execution

| Unit of Measurement   | Benchmark | Outcome | Benchmark Achieved? |
|---|-----------|---------|---------------------|
| Average error rate in completing a task as a percentage (decrease). | <1%       | <1%     | Yes                 |

2015

#### CE #1: Agency Cost Savings

| Unit of Measurement                       | Benchmark | Outcome | Benchmark Achieved? |
|---|-----------|---------|---------------------|
| Total cost of task in dollars (decrease). | \$9,048   | \$3,258 | Yes                 |

#### CE #2: Staff Time Savings

| Unit of Measurement                                  | Benchmark | Outcome | Benchmark Achieved? |
|--|-----------|---------|---------------------|
| Time to complete the task in staff hours (decrease). | 416       | 157     | Yes                 |

## Approved MTW Activities

### MTW Report Year

### Outcomes

2016

#### *CE #3 : Decrease in Error Rate of Task Execution*

| Unit of Measurement   | Benchmark | Outcome | Benchmark Achieved? |
|---|-----------|---------|---------------------|
| Average error rate in completing a task as a percentage (decrease). | <1%       | <1%     | Yes                 |

#### *CE #1: Agency Cost Savings*

| Unit of Measurement                       | Benchmark | Outcome  | Benchmark Achieved? |
|---|-----------|----------|---------------------|
| Total cost of task in dollars (decrease). | \$9,048   | \$10,166 | Yes                 |

#### *CE #2: Staff Time Savings*

| Unit of Measurement                                  | Benchmark | Outcome | Benchmark Achieved? |
|--|-----------|---------|---------------------|
| Time to complete the task in staff hours (decrease). | 416       | 166     | Yes                 |

#### *CE #3 : Decrease in Error Rate of Task Execution*

| Unit of Measurement   | Benchmark | Outcome | Benchmark Achieved? |
|---|-----------|---------|---------------------|
| Average error rate in completing a task as a percentage (decrease). | <1%       | <1%     | Yes                 |

2017

Closed out activity

Keene Housing administered the Housing Quality Standards Biennial Inspection Schedule activity for 5 years. The outcomes achieved were as we expected. KH was pleased to see our successful MTW initiative become available to all PHAs with HUD's changes to 24 CFR 982.405, which permits all housing authorities to implement biennial inspection schedules.

## **2013.01.CE HOUSING QUALITY STANDARDS (HQS) ALTERNATIVE INSPECTION PROTOCOL**

*Plan Year Approved: 2013    Year Implemented: 2013    Year Closed: 2017*

In 2013 Keene Housing discontinued inspecting units held to a stricter inspection protocol than HQS – REAC/UPCS, State Finance Authority, etc. If a property is inspected under a stricter inspection protocol than HQS, and the property receives a “pass” score, KH relies on that inspection to demonstrate compliance with the property’s biennial HQS inspection requirement.

Due to changes in 24 CFR982.405 which now permit all public housing authorities to utilize a biennial inspection schedule, KH closed out this activity in FY2017.





# Section V.

## Sources and Uses of Funding

### Sources and Uses of MTW Funds

Actual Sources and Uses of MTW Funding for the Fiscal Year.

Sources and uses submitted in FDS format through the Financial Assessment System – PHA.

### Activities that Used Only MTW Single Fund Flexibility

KH does not own any public housing and therefore does not combine Section 8 and Section 9 funds. KH relies solely on section 8 funds and administrative fees to administer our programs.

### Local Asset Management Plan

Is the PHA allocating costs within statute? YES

Is the PHA implementing a local asset management plan (LAMP)? NO

If the PHA is implementing a LAMP, it shall be described in an appendix every year beginning with the year it is proposed and approved. The narrative shall explain the deviations from existing HUD requirements and should be updated if any changes are made to the LAMP.

Has the PHA provided a LAMP in the appendix? NO

Keene Housing does not own or manage any public housing units and is not required to implement or submit a Local Asset Management Plan.

# Section VI.

## Administrative

### **Agency Review**

Keene Housing was not subject to any HUD reviews, audits, or physical inspection issues which required agency action.

### **PHA-Directed Evaluations of MTW**

Keene Housing did not engage in any PHA-directed evaluations of the demonstration in 2018.

### **Certification of Compliance**

See following page.

## CERTIFICATIONS OF COMPLIANCE

### U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT OFFICE OF PUBLIC AND INDIAN HOUSING

#### Certifications of Compliance with Regulations: Board Resolution to Accompany the Annual Moving to Work Plan

Acting on behalf of the Board of Commissioners of the Moving to Work Public Housing Agency (MTW PHA) listed below, as its Chairman or other authorized MTW PHA official if there is no Board of Commissioners, I approve the submission of the Annual Moving to Work Plan for the MTW PHA Plan Year beginning (01/01/2018), hereinafter referred to as "the Plan", of which this document is a part and make the following certifications and agreements with the Department of Housing and Urban Development (HUD) in connection with the submission of the Plan and implementation thereof:

- (1) The MTW PHA published a notice that a hearing would be held, that the Plan and all information relevant to the public hearing was available for public inspection for at least 30 days, that there were no less than 15 days between the public hearing and the approval of the Plan by the Board of Commissioners, and that the MTW PHA conducted a public hearing to discuss the Plan and invited public comment.
- (2) The MTW PHA took into consideration public and resident comments (including those of its Resident Advisory Board or Boards) before approval of the Plan by the Board of Commissioners or Board of Directors in order to incorporate any public comments into the Annual MTW Plan.
- (3) The MTW PHA certifies that the Board of Directors has reviewed and approved the budget for the Capital Fund Program grants contained in the Capital Fund Program Annual Statement/Performance and Evaluation Report, form HUD-50075.1 (or successor form as required by HUD).
- (4) The MTW PHA will carry out the Plan in conformity with Title VI of the Civil Rights Act of 1964, the Fair Housing Act, section 504 of the Rehabilitation Act of 1973, and title II of the Americans with Disabilities Act of 1990.
- (5) The Plan is consistent with the applicable comprehensive housing affordability strategy (or any plan incorporating such strategy) for the jurisdiction in which the PHA is located.
- (6) The Plan contains a certification by the appropriate state or local officials that the Plan is consistent with the applicable Consolidated Plan, which includes a certification that requires the preparation of an Analysis of Impediments to Fair Housing Choice, for the MTW PHA's jurisdiction and a description of the manner in which the Plan is consistent with the applicable Consolidated Plan.
- (7) The MTW PHA will affirmatively further fair housing by fulfilling the requirements at 24 CFR 903.7(o) and 24 CFR 903.15(d), which means that it will take meaningful actions to further the goals identified in the Assessment of Fair Housing (AFH) conducted in accordance with the requirements of 24 CFR 5.150 through 5.180, that it will take no action that is materially inconsistent with its obligation to affirmatively further fair housing, and that it will address fair housing issues and contributing factors in its programs, in accordance with 24 CFR 903.7(o)(3). Until such time as the MTW PHA is required to submit an AFH, and that AFH has been accepted by HUD, the MTW PHA will address impediments to fair housing choice identified in the Analysis of Impediments to fair housing choice associated with any applicable Consolidated or Annual Action Plan under 24 CFR Part 91.
- (8) The MTW PHA will comply with the prohibitions against discrimination on the basis of age pursuant to the Age Discrimination Act of 1975.
- (9) In accordance with 24 CFR 5.105(a)(2), HUD's Equal Access Rule, the MTW PHA will not make a determination of eligibility for housing based on sexual orientation, gender identity, or marital status and will make no inquiries concerning the gender identification or sexual orientation of an applicant for or occupant of HUD-assisted housing.
- (10) The MTW PHA will comply with the Architectural Barriers Act of 1968 and 24 CFR Part 41, Policies and Procedures for the Enforcement of Standards and Requirements for Accessibility by the Physically Handicapped.
- (11) The MTW PHA will comply with the requirements of section 3 of the Housing and Urban Development Act of 1968, Employment Opportunities for Low- or Very-Low Income Persons, and with its implementing regulation at 24 CFR Part 135.
- (12) The MTW PHA will comply with requirements with regard to a drug free workplace required by 24 CFR Part 24, Subpart F.
- (13) The MTW PHA will comply with requirements with regard to compliance with restrictions on lobbying required by 24 CFR Part 87, together with disclosure forms if required by this Part, and with restrictions on payments to influence Federal Transactions, in accordance with the Byrd Amendment and implementing regulations at 49 CFR Part 24.

- (14) The MTW PHA will comply with acquisition and relocation requirements of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 and implementing regulations at 49 CFR Part 24 as applicable.
- (15) The MTW PHA will take appropriate affirmative action to award contracts to minority and women's business enterprises under 24 CFR 5.105(a).
- (16) The MTW PHA will provide HUD or the responsible entity any documentation needed to carry out its review under the National Environmental Policy Act and other related authorities in accordance with 24 CFR Part 58. Regardless of who acts as the responsible entity, the MTW PHA will maintain documentation that verifies compliance with environmental requirements pursuant to 24 Part 58 and 24 CFR Part 50 and will make this documentation available to HUD upon its request.
- (17) With respect to public housing and applicable local, non-traditional development the MTW PHA will comply with Davis-Bacon or HUD determined wage rate requirements under section 12 of the United States Housing Act of 1937 and the Contract Work Hours and Safety Standards Act.
- (18) The MTW PHA will keep records in accordance with 24 CFR 85.20 and facilitate an effective audit to determine compliance with program requirements.
- (19) The MTW PHA will comply with the Lead-Based Paint Poisoning Prevention Act and 24 CFR Part 35.
- (20) The MTW PHA will comply with the policies, guidelines, and requirements of OMB Circular No. A-87 (Cost Principles for State, Local and Indian Tribal Governments) and 24 CFR Part 200.
- (21) The MTW PHA will undertake only activities and programs covered by the Plan in a manner consistent with its Plan and will utilize covered grant funds only for activities that are approvable under the Moving to Work Agreement and Statement of Authorizations and included in its Plan.
- (22) All attachments to the Plan have been and will continue to be available at all times and all locations that the Plan is available for public inspection. All required supporting documents have been made available for public inspection along with the Plan and additional requirements at the primary business office of the PHA and at all other times and locations identified by the MTW PHA in its Plan and will continue to be made available at least at the primary business office of the MTW PHA.

Keene Housing

NH010

MTW PHA NAME

MTW PHA NUMBER/HA CODE

*I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate. Warning: HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802).*

J.B. Mack

Chairperson, Board of Directors

NAME OF AUTHORIZED OFFICIAL

TITLE

SIGNATURE

DATE

*\* Must be signed by either the Chairman or Secretary of the Board of the MTW PHA's legislative body. This certification cannot be signed by an employee unless authorized by the MTW PHA Board to do so. If this document is not signed by the Chairman or Secretary, documentation such as the by-laws or authorizing board resolution must accompany this certification.*

Extract of the Minutes of the Meeting of the  
Keene Housing Board of Commissioners  
March 21, 2019

Members Present: J.B. Mack, Chairperson  
Tom Moses, Vice Chairperson  
Pam Slack, Commissioner  
Jen Marsh, Commissioner


Resolution No. 628 – Approval of the Fiscal Year 2018 Moving to Work (MTW) Annual Report

RESOLVED, that the Keene Housing Board of Commissioners approves the Fiscal Year 2018 Moving to Work (MTW) Annual Report, pursuant to the March 7, 2019 memorandum from Denise Pratt, Director of Programs and Services to Joshua R. Meehan, Executive Director.

Motion to adopt: Ms. Slack

Motion seconded by: Ms. Marsh

Motion, upon being put to vote, was passed unanimously.

  
Joshua Meehan, Executive Director

3/25/2019  
Date



# Appendix I.

## Keene Housing Portfolio

### Main Developments

|  | Units | Housing Type/<br>Program                   | Description   |
|--|-------|--|---|
| Keene Affordable Housing Properties (KAHP) | 211   | Family/MTW project-based subsidy ALL UNITS | Previously public housing. Range of units and building styles from efficiencies to 4 bedrooms – 14 accessible units |

### Multi-Family Section 8 (All Non-MTW)

|                        | Units | Housing Type/<br>Program            | Description  |
|------------------------|-------|-------------------------------------|--|
| Central Square Terrace | 90    | Senior and Disabled/<br>Multifamily | Efficiencies and 1 bedroom units in high rise with elevator – 9 accessible units |

### Low Income Housing Tax Credit (LIHTC) Properties

|  | Unit | Housing Type/<br>Program                    | Description   |
|--|------|---|---|
| Riverbend (Includes HOME Units)                        | 24   | Family/MTW project-based subsidy ALL UNITS  | 2 and 3 bedroom townhouse style units – 2 accessible units            |
| Evergreen Knoll (Includes HOME units and USDA Subsidy) | 32   | Family/MTW project-based subsidy 3 UNITS    | 2 and 3 bedroom townhouse style units – 4 accessible units            |
| Stone Arch Village Senior Housing                      | 33   | Senior/MTW project-based subsidy ALL UNITS  | 1 and 2 bedroom units in high rise with elevator – 3 accessible units |
| Stone Arch Village Family Housing                      | 24   | Family/ MTW project based subsidy ALL UNITS | 2 and 3 bedroom townhouse style units – 2 accessible units            |

|  | Unit | Housing Type/<br>Program                  | Description   |
|--|------|---|---|
| Brookbend East (includes Multifamily and HOME units) | 40   | Family/MTW project-based subsidy 11 UNITS | 2 and 3 bedroom units in townhouse style units - 2 accessible units |
| Brookbend West (includes Multifamily and HOME units) | 35   | Family/MTW project-based subsidy 10 UNITS | 2 and 3 bedroom units in townhouse style units - 2 accessible units |

## Affordable Housing Preservation Program

|             | Units | Housing Type/<br>Program | Description  |
|-------------|-------|--------------------------|--|
| Meadow Road | 18    | Family/AHPP              | 2 and 3 bedroom townhouse style units – 2 accessible units |

## Special Programs – CDBG & Shelter

|                             | Units | Housing Type/<br>Program                    | Description  |
|-----------------------------|-------|---|--|
| Ash Brook                   | 24    | Family (Non-MTW)                            | 1 bedroom units  |
| Emerald Street House        | 10    | Section 202 (Non-MTW)                       | Group home with shared bathroom/s and common spaces. Manager unit on site. |
| Fairweather Lodge           | 6     | Developmentally Disabled (Non-MTW)          | 5-bedroom and 1-bedroom apartment with shared bathroom and common spaces.  |
| Cottage Street              | 3     | Family/ MTW project-based subsidy ALL UNITS | 2 and 3 bedroom units – 3 accessible units                                 |
| Water Street Family Shelter | 1     | Shelter Housing/ MTW THASP                  | Homeless Shelter   |
| 139 Roxbury Street Shelter  | 1     | Shelter Housing/ MTW THASP                  | Homeless Shelter   |
| Total Units                 | 552   |   |  |

## Keene Housing Voucher Programs

|  | Units |
|--|-------|
| Moving To Work (MTW) Housing Choice Voucher (HCV) Program                  | 587   |
| Affordable Housing Preservation Program Project Based Vouchers             | 18    |
| Mainstream-5 Voucher Program   | 50    |
| Non-Elderly/Disabled (NED) Voucher Program Administered under MTW Policies | 100   |
| 2018 Mainstream Voucher Program  | 19    |
| Total  | 774   |

## **Appendix II.**

# Keene Housing Strategic Plan



# STRATEGIC PLAN

## 2015-2020

*"The test of our progress is not whether we add more to the abundance of those who have much; it is whether we provide enough for those who have too little."*

Franklin Delano Roosevelt  
Second Inaugural Address



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## INTRODUCTION

Keene Housing (KH) developed this Strategic Plan with the active engagement of the Board of Commissioners, KH management and operations staff and residents. In addition to an updated mission statement, the Plan includes a series of priority goals and initiatives that provide a framework for major agency activities and resource allocation decisions for the three to five year period beginning in January 2015.

The Strategic Plan was presented to the Board for review and approval at their December 2014 meeting. Prior to Board approval, Keene Housing published a draft version of this Plan to provide the public with an opportunity for review and comment.

## Plan Update

When the Board of Commissioners approved this Strategic Plan, they committed to not simply putting it on a shelf, to remain untouched until it expired in 2020. The Board believes that a Strategic Plan must be a living document, one that can be refined and revised in the face of shifting demographics, economics, technology, opportunities and challenges. To accomplish this, the Board of Commissioners, along with KH's management team, periodically meets to review our progress towards meeting the Plan's Objectives. These "check-ins" provide an opportunity for reflection and revision. The report on the following pages tracks changes the Board has made to the Strategic Plan through the "check-in" process.

# 2018 PROGRESS REPORT

| Goal 1: Preserve, maintain and improve Keene Housing's existing housing portfolio |  |   |
|---|--|---|
| 1.1   | Preventive maintenance plans   | ✓ |
| 1.2   | Landscape and grounds improvement and maintenance plan   | ✓ |
| 1.3   | Capital Plan activities  | ✓ |
| 1.4   | Updated Physical Needs Assessment  | ✓ |
| 1.5   | Assess construction defects and implement corrective action plan   | ✓ |
| 1.6   | Refinancing/Recapitalization plans for Riverbend and CST   | ✓ |
| 1.7   | <b>REVISED 2018</b> Assess options for <del>scattered site units and shelters</del>  | ⊙ |
| 1.8   | Working Capital account for modernization and acquisition  | ✓ |
| Goal 2: Preserve and expand the Monadnock region's affordable housing stock       |  |   |
| 2.1   | Undertake at least one development project by 2020   | ⊙ |
| 2.2   | Re-purpose vacant and/or underutilized KH properties   | ⊙ |
| 2.3   | <b>REMOVED 2017</b> <del>Assess expanding Affordable Housing Preservation Program</del>  | ⊙ |
| Goal 3: Promote energy conservation and sustainability                            |  |   |
| 3.1   | <b>REVISED 2018</b> Explore strategies for reducing consumption and promoting sustainability and implement energy generation and efficiency strategies | ⊙ |
| 3.2   | Evaluate options for replacing electric heat systems   | ⊙ |
| 3.3   | Monitor utility consumption  | ✓ |
| Goal 4: Prudently manage and oversee agency finances                              |  |   |
| 4.1   | Create and implement an agency-wide Financial Management Plan  | ✓ |
| 4.2   | Regularly renew and update cost allocation methodology   | ✓ |
| 4.3   | Conduct analysis of benefits and health insurance costs  | ✓ |
| 4.4   | Conduct analysis of property insurance costs   | ✓ |
| 4.5   | Identify and secure additional revenue   | ✓ |
| 4.6   | Evaluate and, if feasible, increase commercial rents   | ✓ |
| Goal 5: Achieve excellence in management  |  |   |
| 5.1   | Maintain high voucher utilization and unit occupancy   | ✓ |
| 5.2   | Develop and implement policy and procedures manuals  | ⊙ |
| 5.3   | Review and revise all Agency forms   | ⊙ |
| 5.4   | Develop and implement an agency-wide Quality Control protocol  | ⊙ |
| 5.5   | Work with AHAB to help create industry-wide accreditation standards  | ✓ |
| 5.6   | Improve business systems and governance practices  | ✓ |
| 5.7   | <b>NEW 2017</b> Receive Accreditation  | ⊙ |

Completed ✓ Underway ⊙ Not Started ○

|  |   |
|--|---|
| <b>Goal 6: Promote wellness and independence among seniors and residents with disabilities</b>                           |   |
| 6.1 Hire elderly/disabled resident coordinators  | ✓ |
| 6.2 <b>REMOVED 2017</b> Participate in efforts to expand supportive housing services                                     | ⊙ |
| 6.3 Assess strategies to ensure successful housing search and tenancy  | ✓ |
| 6.4 <b>New 2017</b> Implement strategies to ensure successful housing search and tenancy                                 | ✓ |
| <b>Goal 7: Support greater resident self-sufficiency</b>   |   |
| 7.1 Continue operating RSR and SSP programs  | ✓ |
| 7.2 Evaluate RSR and SSP annually, using data to inform policy revisions   | ✓ |
| 7.3 Define and collect measurable outcomes for THASP   | ⊙ |
| 7.4 Evaluate feasibility of establishing FACs at additional family sites   | ✓ |
| 7.5 <b>REVISED 2016</b> Increase the use of FACs by local service providers and residents                                | ⊙ |
| <b>Goal 8: Focus on healthy youth development</b>  |   |
| 8.1 Establish KHKC   | ✓ |
| 8.2 Develop and implement long and short-term KHKC fundraising strategy  | ✓ |
| 8.3 <b>REMOVED 2016</b> Develop and implement youth programming  | ○ |
| <b>Goal 9: Build staff and Board capacity and skills</b>   |   |
| 9.1 <b>REMOVED 2016</b> Develop and implement agency-wide training plan  | ○ |
| 9.2 Continue bonus program that recognizes extraordinary performance   | ✓ |
| 9.3 <b>REMOVED 2018</b> Expand Policy & Technology tab   | ✓ |
| 9.4 Implement periodic employee satisfaction/feedback surveys  | ✓ |
| 9.5 Develop a revised on-boarding packet for new Board members   | ✓ |
| 9.6 <b>REVISED 2016</b> Develop regular Board training schedule  | ⊙ |
| 9.7 <b>NEW 2016</b> Continue developing strategies to attract and retain quality staff                                   | ✓ |
| <b>Goal 10: Enhance customer service and operational efficiency</b>  |   |
| 10.1 Develop and implement data management strategies  | ✓ |
| 10.2 Develop and implement a Communications Plan   | ⊙ |
| 10.3 <b>REVISED 2016</b> Develop and implement a plan to solicit feedback on KH programs                                 | ⊙ |
| 10.4 <b>REVISED 2018</b> Work with Keene State College Safety Department and experts to develop a disaster response plan | ⊙ |
| <b>Goal 11: Foster innovation through the Moving to Work program</b>   |   |
| 11.1 Secure ten-year extension of, or permanent, MTW status  | ✓ |
| 11.2 Conduct ongoing evaluations of MTW activities   | ✓ |
| 11.3 Develop and implement Rent Simplification program for AHPP  | ✓ |

Completed ✓ Underway ⊙ Not Started ○

## BACKGROUND ON KEENE HOUSING PROGRAMS, CHALLENGES AND OPPORTUNITIES

- Keene Housing was originally established in 1965 as the Keene Housing Authority pursuant to the New Hampshire Housing Authorities law. Today, KH is one of the largest providers of affordable housing and rental assistance in Keene and the Monadnock region, owning and managing a complex, diverse portfolio of housing resources.
- KH's affordable housing resources include tenant-based rental assistance vouchers funded through the US Department of Housing and Urban Development (HUD) Housing Choice Voucher program. This program consists of 150 vouchers that are targeted specifically for people with disabilities, plus 235 tenant-based vouchers that are available for low-income households selected from KH's waiting list.
- In addition to providing tenant-based rental assistance, KH (through affiliates) owns and/or manages a portfolio of 551 housing units that are assisted with HCV project-based assistance or other forms of subsidy. Due to their age and the limited availability of capital resources, many of these existing units require significant capital investments now and into the near future. Improving and preserving KH's current affordable housing portfolio is a primary goal over the next several years:

**Keene Affordable Housing Properties (KAHP)** – KAHP consists of 211 rental units in nine (9) former public housing sites that have been converted to Project Based Voucher (PBV) developments. There is an estimated need for approximately \$3.8 million in capital improvements at KAHP developments.

**Low Income Housing Tax Credit (LIHTC) Properties** – KH's portfolio includes 164 LIHTC family and senior rental units located in four developments (Riverbend, Evergreen Knoll, Stone Arch Villages and Brookbend East and West). Financing sources and operating subsidies for these developments come from a variety of State, Federal, and private sources. The initial LIHTC compliance period is over for the twenty-four (24) units at Riverbend, creating the need for refinancing and/or other efforts to preserve its long-term viability and affordability. Excluding the Brookbend developments, which were completed in 2014, there is an estimated need for approximately \$1.88 million in capital improvements at these sites.

**HUD Multifamily Section 8 Properties** – This includes two (2) developments consisting of a total of 108 family and senior/disabled rental units. Both Meadow Road (18 units) and Central Square Terrace (90 units) have significant capital needs, estimated at approximately \$580,000.

**Homeless Shelters** – KH owns a 14 bed men’s shelter on Roxbury Street and a 20 bed family shelter on Water Street. Both shelters are operated by Southwestern Community Services with operating support from KH’s Transitional Housing Assistance Subsidy Program (THASP).

**Special Programs/Management Only** – This property grouping includes forty (40) units including the Ash Brook development of twenty-four (24) rental units managed by KH; two group homes for persons with disabilities owned by Monadnock Family Services (MFS).

- The cost of utilities, labor and other expenses associated with owning and managing rental properties continues to out-pace the revenue received by Keene Housing through its HUD and other subsidy sources. Given the extreme pressures on the federal budget, it appears unlikely that this trend will reverse itself. Thus, efforts to conserve energy and to implement management innovations and other cost-saving measures are strategically important goals now and into the future.
- With a median rent of \$1,039 in 2013 and a very low vacancy rate, the demand for affordable housing in Keene and the surrounding area is high. Waiting times for low-income households on KH’s property waiting lists range from one to seven years. The average waiting time for a tenant-based voucher is approximately three years. In light of increasing demand, KH has prioritized both the need to preserve its existing housing portfolio as well as to preserve other at-risk affordable developments and expand the supply of affordable housing in the Monadnock region.
- Residents of Keene Housing are some of the region’s poorest citizens: Median household income is \$13,680; 33% of household heads are disabled; 58% of all household income comes from Social Security and Social Security Disability payments; and, only 23% of households have income from employment. Almost 500 children live in KH developments or homes receiving KH rental assistance. Based on family income and other factors, they are at-risk for low school performance, involvement with the criminal justice system, health issues and other problems.
- Keene Housing’s mission statement acknowledges the importance of providing supportive services in tandem with affordable housing as a means to strengthen and empower residents. Towards this end, KH has implemented innovative rent policies and partnered with local agencies on an array of supportive service programs. Work-able adults receiving housing assistance through the Moving to Work Housing Choice Voucher Program participate in the Resident Self Reliance (RSR) and Stepped Subsidy Program (SSP) designed to encourage work, improve educational attainment, increase financial literacy and succeed in meeting lease obligations. Family Activity Centers (FAC) at KH’s North & Gilsum and Forest View properties provide a focal point for these services as well as for the new Keene Housing Kids Collaborative (KHKC) initiative. In

collaboration with Keene Public Schools and other partners, KHKC will focus intensive services to support youth from preschool through high school. Both ongoing work to support economic self-sufficiency among adults and the new initiative to support healthy youth development are considered high priority goals under the Strategic Plan.

- Keene Housing is one of only thirty-nine (39) Public Housing Authorities in the country selected to participate in the federal Moving to Work (MTW) program. MTW is a demonstration program created by Congress under which Keene and other participating agencies are able to waive some provisions of the US Housing Act of 1937, flexibly use their funding to support approved purposes, and test out locally determined strategies that help address one or more of MTW's statutory objectives. These statutory objectives focus on expanding housing choice, encouraging resident economic self-sufficiency, and achieving operational efficiencies.

- The MTW Agreement between Keene Housing and HUD is currently slated to expire in 2018. Given the enormous negative impact that termination of MTW status would have on the availability of housing and service program resources, Keene Housing views extension of the MTW Agreement beyond 2018 as one of its top priority goals.

## MISSION STATEMENT

Early in 2013, KH began the process of taking a long, hard look at who we are as an organization and where we see ourselves heading in the years ahead. This self-reflection resulted in a new name, logo, and branding that better reflected our role as more than providers of affordable housing but also as advocates for our low-income neighbors and the community we call home. The last phase of this process is the adoption of a new mission statement that conveys who we are.

The purpose of a mission statement is to communicate the purpose of the agency to people inside and outside of it. The mission statement provides the basis for strategy development, identification of critical success factors, resource allocation decisions, as well as ensuring client and stakeholder satisfaction. After extensive engagement of KH's Board of Commissioners, management and operations staff, and residents, KH adopted the following revised mission statement:

"Keene Housing provides and advocates for affordable housing and supportive services that strengthen and empower low and moderate-income households in the Monadnock region."

## STRATEGIC GOALS AND OBJECTIVES

To respond to the challenges and opportunities facing Keene Housing, the following eleven (11) strategic goals are adopted:

- Goal 1. Preserve, maintain and improve Keene Housing's existing housing portfolio
- Goal 2. Preserve and expand the Monadnock region's affordable housing stock
- Goal 3. Promote energy conservation and sustainability
- Goal 4. Prudently manage and oversee agency finances
- Goal 5. Achieve excellence in management
- Goal 6. Promote wellness and independence among seniors and residents with disabilities
- Goal 7. Support greater resident self-sufficiency
- Goal 8. Focus on healthy youth development
- Goal 9. Build staff and Board capacity and skills
- Goal 10. Enhance customer service and operational efficiency
- Goal 11. Foster innovation through the Moving to Work program

The Strategic Goals are intended as a framework to help shape major activities and budget priorities over the next three to five years. For each goal, a set of related Objectives and Priority Projects are identified as summarized on the following pages. As circumstances change and new challenges and opportunities present themselves, the goals and objectives may be modified accordingly. For example, significant decreases to agency funding may require that some priority projects be reconsidered. The Executive Director will monitor and report periodically to the Board of Commissioners on the status of each goal and priority project.

# GOAL 1:

## PRESERVE, MAINTAIN AND IMPROVE KH'S EXISTING HOUSING PORTFOLIO

KH's existing portfolio (551 units) of affordable housing developments represents an enormous investment and an irreplaceable community asset. Improving physical conditions at KH developments and ensuring their ongoing financial viability are essential to the quality of life for current residents and for the preservation of these resources for future generations. This goal encompasses a broad range of planned activities including high priority capital improvements, landscaping and other initiatives to improve "curb appeal", preventive maintenance and, at selected sites, analysis of future ownership and/or refinancing options.

### Objective

- Address priority capital needs
- Restructure financing where needed to ensure viability and long-term affordability
- Streamline ownership structures where feasible
- Identify and secure new funding to support capital needs including broader use of MTW funds
- Improve "curb appeal"

### Priority Projects

- 1.1** Update and implement preventive maintenance plans system-wide
- 1.2** Develop and implement portfolio-wide landscape and grounds improvement and maintenance plan
- 1.3** Implement approved Capital Plan activities with a focus on life safety issues and building envelope projects, in a manner that keeps residents informed and minimizes the disruptions to their lives
- 1.4** Update Physical Needs Assessment on a five-year cycle
- 1.5** Assess construction defects and implement corrective action plan at Harper Acres, North & Gilsum and Forest View
- 1.6** Develop and implement refinancing/recapitalization plans for Riverbend and Central Square Terrace
- 1.7** Assess needs, ownership options and future strategies for ~~scattered site units and shelters~~ (REVISED 2018)
- 1.8** Create and capitalize a working capital account for modernization and acquisition

# GOAL 2:

## PRESERVE AND EXPAND THE REGION'S AFFORDABLE HOUSING STOCK

The increasing cost of rents in the Monadnock region, combined with very low vacancy rates, highlights the urgent need to preserve existing affordable housing units while also expanding the regional supply. In tandem with efforts to maintain and preserve its existing housing portfolio, Keene Housing's goal is to leverage its resources to address broader, regional housing needs through a combination of preservation and new development initiatives.

### Objective

- Leverage Project Based Vouchers and the Transitional Housing Assistance Subsidy Program (THASP) as regional preservation and expansion tools
- Pursue development opportunities that respond to identified, quantifiable regional housing needs
- Protect long-term affordability of the region's Expiring Use properties

### Priority Projects

**2.1** Undertake at least one development project by 2020

**2.2** Evaluate potential role in local efforts to re-purpose vacant and/or underutilized Keene properties

**2.3** Assess expanding Affordable Housing Preservation Program (REMOVED 2017)

# GOAL 3:

## PROMOTE ENERGY CONSERVATION AND SUSTAINABILITY

Energy costs represent Keene Housing's largest single category of non-personnel operating expense. Focusing on reducing current utility consumption and incorporating energy efficient, sustainable materials into capital projects is the focus of this strategic goal.

### Objective

- Leverage energy conservation and investment strategies to lower costs and reduce carbon footprint
- Integrate conservation and sustainability into modernization and development planning

### Priority Projects

**3.1** Assess options and develop an energy reinvestment/sustainability plan exploring generation options, use of sustainable materials and other strategies for reducing consumption, promoting sustainability, and implement energy generation and efficiency strategies (REVISED 2018)

**3.2** Evaluate options for replacing electric heat systems and, if financially feasible, implement at portfolio-wide

**3.3** Monitor utility consumption to inform choices and quantify savings from retrofits and improvements

# GOAL 4:

## PRUDENTLY MANAGE AND OVERSEE AGENCY FINANCES

Ongoing reductions in federal housing expenditures have severely constrained Keene Housing's ability to fully address capital, supportive service and other needs. Over the next several years, there appears to be little likelihood that this situation will be reversed. Utilizing its MTW flexibility, KH has worked to maximize the resource leveraging impact of its available funds, while implementing creative management policies that have helped to keep per unit housing cost increases to a manageable level. KH's Strategic Goals in this area include efforts to diversify funding sources, increase non-federal financial reserves and contain operating costs.

### Objective

- Strengthen financial analysis and reporting capabilities
- Contain/minimize operating costs
- Expand and diversify funding sources to reduce reliance on HUD and USDA
- Increase non-federal operating reserves
- Maximize potential rent for commercial spaces

### Priority Projects

- 4.1** Create and implement an agency-wide Financial Management Plan
- 4.2** Regularly renew and update cost allocation methodology
- 4.3** Conduct analysis of benefits and health insurance costs pursuing cost-effective but equitable opportunities where feasible
- 4.4** Conduct analysis of property insurance costs pursuing cost effective opportunities where feasible
- 4.5** Identify and secure additional revenue through grants, increased management fees, and other initiatives
- 4.6** Evaluate and, if feasible, increase commercial rents

## GOAL 5: ACHIEVE EXCELLENCE IN MANAGEMENT

A commitment to providing high quality property management and maintenance services to all residents is at the core of Keene Housing's organizational culture. This strategic goal focuses on achieving industry-leading performance on key performance indicators including occupancy, vacancy turnaround, rent collections and work order completion. Documenting and implementing best practice procedures throughout the organization is a major objective under this goal. KH will also collaborate with affordable housing providers throughout the country to create a national Affordable Housing Accreditation system.

### Objective

- Maximize utilization of available voucher and housing resources
- Meet or exceed performance goals related to property management and maintenance indicators
- Document and maintain policies and procedures that meet applicable regulatory requirements
- Become accredited

### Priority Projects

- 5.1** Maintain 93%/101% utilization in the Mainstream and Non Elderly Disabled voucher programs, and 98% occupancy in the owned and managed portfolio
- 5.2** Develop and implement Housing and Programs and Services policy and procedures manuals including an annual review/revision plan
- 5.3** Review and revise all Agency forms including an annual review/revision plan
- 5.4** Develop and implement an agency-wide Quality Control protocol
- 5.5** Work with Affordable Housing Accreditation Board (AHAB) to help inform and create industry-wide accreditation standards
- 5.6** Improve business systems and governance practices as needed to meet Accreditation standards
- 5.7** Recieve Accreditation (NEW 2017)

# GOAL 6:

## PROMOTE WELLNESS AND INDEPENDENCE AMONG SENIORS AND RESIDENTS WITH DISABILITIES

Seniors and people with disabilities comprise a substantial percentage of Keene Housing’s residents. This strategic goal reflects a commitment to assist elderly and disabled residents to live independently and to access health care and other services. Primarily this will continue to be accomplished through partnerships with local agencies that have the necessary resources and expertise. Efforts will be undertaken to secure funding for site-based service coordinators to assist in linking residents to local resources.

### Objective

- Leverage resources to secure funding and services

### Priority Projects

- 6.1 Secure new funding or allocate existing funding to hire elderly/disabled resident coordinators
- 6.2 ~~Participate in regional efforts to make supportive housing services available to more elderly and disabled residents (REVISED 2016) (REMOVED 2017)~~
- 6.3 Assess strategies to ensure successful housing search and long-term tenancies for disabled residents and voucher holders
- 6.4 Implement strategies to ensure successful housing search and long-term tenancy (NEW 2017)

# GOAL 7: SUPPORT GREATER RESIDENT SELF-SUFFICIENCY

Assisting work-able residents in finding and keeping employment, improving educational attainment and increasing family assets are key objectives under the MTW Program. The Resident Self Reliance (RSR) and Stepped Subsidy Program (SSP) are innovative strategies adopted by KH that work together to encourage and incentivize residents towards family self-sufficiency. This Strategic Goal incorporates the continued operation and evolution of RSR and SSP and related partnerships and other activities. KH is committed to ongoing program evaluation to determine which program components are effective or ineffective so that policy and procedural changes can be made.

## Objective

- Provide incentives for employment and asset building
- Build social connections and sense of community
- Focus on measurable outcomes

## Priority Projects

- 7.1** Continue operating RSR and SSP programs with mentoring, incentives, employment and financial literacy tools
- 7.2** Evaluate RSR and SSP annually, using data to inform policy revisions
- 7.3** Define and collect measurable outcomes for Transitional Housing Assistance Shelter Program (THASP)
- 7.4** Evaluate feasibility of establishing Family Activity Centers at additional family sites
- 7.5** Increase the use of the Family Activity Centers by local service providers and residents (REVISED 2016)

## GOAL 8: FOCUS ON HEALTHY YOUTH DEVELOPMENT

Through the newly formed Keene Housing Kids Collaborative (KHKC), a major effort is being launched to support the healthy development and educational success of KH youth. Working in partnership with the Keene Public Schools, MoCo Arts, and an array of other local agencies, KH is committed to building/strengthening a network of programs and services that support youth development from preschool through high school. During the Strategic Plan term, KH will work with its partners to raise new funds to support expanded after school programming, internships, Individual Development Accounts (IDA) and other initiatives proven to help low-income youth become successful, self-sufficient adults.

### Objective

- Build on existing efforts to create a broad service/program network that focuses on youth development from preschool through high school
- Incorporate best practice research to identify evidence based, outcome focused programming
- Achieve collective impact through collaboration with schools and other partners

### Priority Projects

- 8.1** Establish KHKC with MTW seed funding and property management operating proceeds
- 8.2** Develop and implement long and short-term KHKC fundraising strategy to reduce and ultimately eliminate reliance on MTW funding
- 8.3** ~~Develop and implement programming including IDA, internship and after-school initiatives (REMOVED 2016)~~

# GOAL 9:

## BUILD STAFF AND BOARD CAPACITY AND SKILLS

A capable and well-trained Board and staff are essential for Keene Housing to continue to achieve excellence, foster innovation and address community needs. This goal incorporates ongoing efforts to support and build Board and staff capacity through training on their respective roles and responsibilities, as well as initiatives to regularly solicit feedback from staff and acknowledge high performance.

### Objective

- Provide staff with the training needed to excel at their jobs
- Provide opportunities for growth in the work place
- Provide opportunities for local students to learn about KH's work and share their ideas
- Ensure that new and current Board members are fully informed of roles and responsibilities
- Work towards establishing a national Housing Authority Accreditation system

### Priority Projects

- 9.1

Develop and implement agency-wide training plan for all positions including new hires (REMOVED 2016)
- 9.2

Continue bonus program that recognizes extraordinary performance
- 9.3

Expand Policy & Technology lab to attract more local student interns (REMOVED 2018)
- 9.4

Implement periodic employee satisfaction/feedback surveys
- 9.5

Develop a revised on-boarding packet for new Board members
- 9.6

Develop regular Board training schedule for new and current members that anticipate emerging accreditation standards (REVISED 2016)
- 9.7

Continue developing strategies that attract and retain quality staff at all organizational levels (NEW 2016)

# GOAL 10:

## ENHANCE CUSTOMER SERVICE AND OPERATIONAL EFFICIENCY

Streamlining agency operations wherever feasible and striving to continuously improve customer service is the focus of this Strategic Goal. Towards this end, Strategic Goal 10 incorporates activities to upgrade KH's website and other technologies, provide more helpful and timely information to residents and minimize disruption to residents and employees in the event of natural disaster or other unforeseen event.

### Objective

- Implement an agency-wide technology plan that helps streamline work processing and improves public/resident access to information
- Implement a communications plan that improves the accuracy and timeliness of information provided to residents
- Provide additional opportunities to receive and respond to public feedback
- Implement a disaster response and recovery plan

### Priority Projects

**10.1** Develop and implement short and long-term strategies for website enhancements, network support, document management, cloud computing, disaster recovery, and enhanced use of electronic communications

**10.2** Develop and implement a Communications Plan that uses technology to improve the timeliness and accuracy of information about KH plans and strategies for residents, community stakeholders and other target audiences

**10.3** Develop and implement a plan to utilize technology, satisfaction surveys, and focus groups to solicit feedback on KH programs and initiatives

**10.4** Work with local, regional and national experts and the Keene State College Safety Department to develop a disaster response plan that accounts for the safety of residents and staff as well as the need to recover quickly from a natural disaster (REVISED 2018)

# GOAL 11:

## FOSTER INNOVATION THROUGH THE MOVING TO WORK PROGRAM

Participation in the MTW Program is a critically important component of Keene Housing's strategy to preserve and expand its portfolio of affordable housing resources and to support residents in securing jobs and improving economic self sufficiency. This goal incorporates activities to secure a long-term extension to the MTW Agreement with HUD and to continue to use MTW flexibility to support innovation and excellence.

### Objective

- Secure an MTW Agreement extension beyond 2018
- Utilize MTW flexibility to improve operations, increase efficiency and implement innovative solutions

### Priority Projects

**11.1** Collaborate with other MTW agencies, HUD, industry groups and Congress to secure a ten-year extension of the MTW agreement or permanent MTW status

**11.2** Conduct ongoing evaluations of MTW activities, and use results of evaluations to improve/modify activities as needed

**11.3** Develop and implement an effective Rent Simplification program for the Affordable Housing Preservation initiative that can be replicated at other agencies