

# FY2016 MOVING TO WORK (MTW) ANNUAL REPORT

Orlando Housing Authority

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**OHA  
Executive  
Office**

April 1, 2015  
through  
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# FY2016 Moving to Work (MTW) Annual Report

April 1, 2015 – March 31, 2016

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## SECTION I: INTRODUCTION



OHA's **Lake Mann** Apartments – Public Housing

## SECTION I: INTRODUCTION

### A. Overview of Orlando Housing Authority's (OHA) Short-Term & Long-Term Goals And Objectives

As an MTW agency, OHA is allowed flexibility to modify certain requirements in order to achieve one or more of the following MTW statutory objectives:

1. Reduce cost and achieve greater costs effectiveness in federal expenditures;
2. Give incentives to families 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
3. Increase housing choices for low-income families.

All activities and uses of funds are discussed in detail in the report. In its fifth year as an MTW Agency, OHA achieved significant success in the implementation of activities 1, 2, 6, 8 and 9. Although there has been progress, activity 10 remains in the early stages of its development. OHA looks forward to the expansion of its MTW program.

OHA's long term goals for MTW activities may change as MTW is a demonstration program. As OHA assesses the needs of its residents and participants, and aligns the need with available resources. Changes may be necessary as needs of the OHA population changes.

#### Non-MTW Activities

The OHA administers a number of non-MTW programs. Such programs include, but are not limited to, the following:

- (1) vouchers for non-elderly persons with disabilities (NED),
- (2) HUD VASH vouchers,
- (3) vouchers for single-room occupancy (SRO),
- (4) family unification vouchers (FUP),
- (5) resident opportunities and supportive services (ROSS)
- (6) family self-sufficiency program (FSS) and
- (7) non-public housing or HCV units
- (8) administration of the Sanford Housing Authority

These programs are essential in the support and assistance to residents and participants that are not involved in MTW activities. For uniformity, OHA added the special purpose vouchers (including SHA vouchers) to the MTW program to the extent consistent with law.

OHA also partnered with the City of Orlando to establish and administer a tenant based rental assistance (TBRA) program for chronically homeless persons by way of HOME Investment Partnerships Program funding. The TBRA program is a non-MTW activity. The applicable memorandum of understanding has been executed.

OHA's non-public housing units are located at West Oaks Apartments (280 one and two bedroom units), Antioch Manor (a project-based section 202 property consisting of 101 units for the elderly) and the 75 unit Jackson Court/Division Oaks Development. Jackson Court is a 58 unit, 3 story senior housing apartment complex with one bedroom units only. Division Oaks is a two story, 17 unit family apartment complex. The Jackson Court/Division Oaks Development operates without any public housing or project-based section 8 subsidy.



In addition, OHA maintains oversight of the Carver Park HOPE VI development, which includes the Landings at Carver Park and the Villas at Carver Park. The Landings at Carver Park is 56 units of affordable housing for families (26 tax credit units and 30 tax credit/public housing hybrid units). The Villas at Carver Park is a 64 unit tax credit/public housing apartment complex for the elderly.

OHA's long term plan for its non-MTW programs is to continue to manage its properties and to seek opportunities for OHA to increase its housing portfolio such that additional affordable housing options are available to the community. In addition, the OHA is committed to improving the quality of housing provided to its residents as funding permits.

### **Other Initiatives**

The Orlando Washington Shores Community was selected as a new Purpose Built Community. The Purpose Built organization is a non-profit consulting firm dedicated to transforming struggling neighborhoods into vibrant, sustainable communities throughout the United States.

Purpose Built partnered with Lift Orlando, the local lead organization to help transform the Washington Shores community which includes two OHA public housing sites: Lorna Doone Apartments and Lake Mann Homes. LIFT Orlando was organized in 2012 and is a nonprofit organization comprised of business leaders partnering with residents to accelerate community transformation. Lift Orlando's mission is to break the cycle of poverty through neighborhood revitalization by unifying the public and private sectors around a common agenda to remove barriers and unlock the pathways to progress and opportunity for the most vulnerable families in the city. LIFT is initially targeting neighborhoods west of Orlando's business core, specifically those near Citrus Bowl Sports Complex. The first initiative to be developed by Lift Orlando is The Villages of West Lakes.

During the reporting period, the OHA pledged 20 project-based housing choice vouchers for low income families (including 10 for chronically homeless families) at The Villages of West Lakes. The OHA's selection of the proposal for this project was based on a prior competitive selection process (LIHTC) that did not contemplate the use of project based vouchers.



OHA is committed to excellence and serving the Orlando community. We strive to improve the Central Florida affordable housing market.

### **Chronic Homelessness Prevention**

The 25 Cities Effort is a key federal strategy through which 25 communities are receiving technical assistance and are mobilizing local planning efforts and partnerships to create effective systems for aligning housing and services interventions through coordinated systems to end homelessness. OHA continues to participate in the 25 Cities Initiative.

### **Rental Assistance Demonstration Program**

The Orlando Housing Authority submitted a portfolio application to HUD in December 2013. The application requested HUD to consider granting approval for the conversion of Citrus Square Apartments (87 units) and Lorna Doone apartments (104 units). OHA's award was approved March 27, 2015. OHA submitted a RAD application for Lorna Doone Apartments on March 25, 2016. HUD approval is pending. OHA is working with a consultant to refine the financing strategy for Citrus Square RAD conversion and plans to submit the RAD financing plan before October 2016.

***Sanford Housing Authority (SHA)***

The OHA continues to manage the Sanford Housing Authority. The goals and objectives for SHA include demolition and redevelopment of the SHA public housing sites. All SHA public housing units were demolished by December 2015 and OHA submitted a Choice Neighborhoods Planning grant application on behalf of SHA.

***Standard HUD Metrics***

HUD recently modified the MTW metrics. OHA is still developing the metrics consistent with HUD's modifications that will apply to OHA's MTW activities and the metrics presented in this report may be modified further.

## SECTION II:

## GENERAL HOUSING AUTHORITY OPERATING INFORMATION



**OHA's Lorna Doone Apartments – Public Housing for Seniors**



## SECTION II: GENERAL HOUSING AUTHORITY OPERATING INFORMATION

### A. Housing Stock Information

New Housing Choice Vouchers that were Project-Based During the Fiscal Year			
Property Name	Anticipated Number of New Vouchers to be Project-Based	Actual Number of New Vouchers that were Project-Based	Description of Project
West Oaks	10	13	<b>Activity 6: Transitional Housing</b> West Oaks Apartments is a three story, 280 unit, affordable market rate rental property in which OHA plans to project base up to fifty units to provide transitional housing to homeless individuals for up to eighteen months. OHA will work with the Wayne Densch Center, Inc., the Orlando Union Rescue Mission and other service providers who will provide case management as a homelessness preventative measure. A total of thirty vouchers/units are to be committed for FY 2016. See activity 6.
Jackson Court / Division Oaks	10	0	<b>Activity 8: Project Based Vouchers in OHA Units</b> OHA desires to project base up to 20% or 538 of its available tenant based section 8 vouchers at OHA owned units. West Oaks (in addition to the vouchers to be used in connection with Activity 6), Jackson Court, Division Oaks are proposed sites for the project-based voucher program.
West Oaks	20	0	<b>Activity 8: Project Based Vouchers in OHA Units</b> OHA desires to project base up to 20% or 538 of its available tenant based section 8 vouchers at OHA owned units. West Oaks (in addition to the vouchers to be used in connection with Activity 6), Jackson Court, Division Oaks are proposed sites for the project-based voucher program.

Anticipated Total Number of New Vouchers to be Project-Based*	Actual Total Number of New Vouchers that were Project-Based	Anticipated Total Number of Project-Based Vouchers Committed at the end of the Fiscal Year*	Anticipated Total Number of Project- Based Vouchers Leased Up or Issued To a Potential Tenant at the end of the Fiscal Year*
40	13	60	60
		Actual Total Number of Project-Based Vouchers Committed at the end of the Fiscal Year	Actual Total Number of Project-Based Vouchers Leased Up or Issued To a Potential Tenant at the end of the Fiscal Year
		33	33

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

OHA had a number of units offline due to mold, termites and VCA related construction.

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

In FY2016, OHA Capital Fund expenditures included \$857,478 for the public housing sites' Capital Fund Financing Program loan repayment to Deutsche Bank.

OHA spent \$600,000 on the Voluntary Compliance Agreement with HUD for improvements to the physical accessibility of OHA common areas and individual housing units. This included upgrades/modifications to its public housing units according to UFAS requirements at Meadow Lakes, Murchison Terrace and Ivey Lane Apartments.

OHA also expended \$80,000 on mold remediation at its various properties.

#### Overview of Other Housing Owned and/or Managed by the PHA at Fiscal Year

Housing Program	Total Units	Overview of the Program
Tax Credit	26	Private market housing that includes affordable rental housing.
Non-MTW HUD	456	HUD subsidized housing not included in the MTW block grant.
Managing Developments	0	All Sanford Housing Authority public housing units were demolished by December 2015.
	482	

\* **Selected Housing Program from:** Tax-Credit, State Funded, Locally Funded, Market-Rate, Non-MTW HUD Funded, Managing Developments for Other Non-MTW Public Housing Authorities, or Other  
If Other, please describe:

## B. Leasing Information

Actual Number of Households Served at the End of the Fiscal Year		
Housing Program	Number of Households Served	
MTW Households Served Through:	Planned	Actual
Number of Units that were Occupied/Leased Through Local, Non-Traditional, MTW Funded, Property-Based Assistance Programs**	1458	1365
Number of Units that were Occupied/Leased through Local, Non-Traditional, MTW Funded, Tenant-Based Assistance Programs** (MTW + homeownership + port outs)	2304	2776
Port-In Vouchers (not absorbed)	0	276
<b>Total Projected and Actual Households Served</b>	<b>3762</b>	<b>4417</b>

Actual Number of Households Served at the End of the Fiscal Year		
Housing Program	Unit Months/Occupied/Leased	
MTW Households Served Through:	Planned	Actual
Number of Units that were Occupied/Leased Through Local, Non-Traditional, MTW Funded, Property-Based Assistance Programs***	17496	16380
Number of Units that were Occupied/Leased through Local, Non-Traditional, MTW Funded, Tenant-Based Assistance Programs (MTW + homeownership + port outs)	27648	33312
Port-In Vouchers (not absorbed)	0	3312
<b>Total Projected and Annual Units Months Occupied/Leased</b>	<b>45144</b>	<b>53004</b>

### Explanation for differences between planned and actual households served

For the Project-Based Assistance Program, OHA had a number of units offline which contributed to the lower actual number of households served.		
	Average Number of Households Served Per Month	Total Number of Households Served During the Year
Households Served through Local Non-Traditional Services Only	13	13

**Reporting Compliance with Statutory MTW Requirements: 75% of Families Assisted are Very Low-Income**

<b>Fiscal Year</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>
Total Number of Local, Non-Traditional MTW Households Assisted	N/A	N/A	4413	4360	4141
Number of Local, Non-Traditional MTW Households with Incomes Below 50% of the Area Median Income	N/A	N/A	4426	4114	3517
Percentage of Local, Non-Traditional MTW Households with Incomes Below 50% of the Area Median Income	N/A	N/A	96%	94%	85%*

\*Note: In prior years, non-MTW vouchers were included

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

**Baseline for the Mix of Family Sizes Served**

<b>Family Size:</b>	<b>Occupied Number of Public Housing Units by Household Size When PHA Entered MTW</b>	<b>Utilized Number of Section 8 Vouchers by Household Size When PHA Entered MTW</b>	<b>Non-MTW Adjustments to the Distribution of Household Sizes</b>	<b>Baseline Number of Household Sizes to be Maintained</b>	<b>Baseline Percentage of Family Sizes to be Maintained</b>
1 Person	505*	1308*	N/A	1813	45%
2 Person	447	370	N/A	817	20%
3 Person	386	745	N/A	1131	28%
4 Person	96	144	N/A	240	1%
5 Person	27	9	N/A	36	0%
6+ Person	2	2	N/A	4	0%
<b>Totals</b>	<b>1463</b>	<b>2578</b>	<b>N/A</b>	<b>4041</b>	<b>94%</b>

\*Sum of 0 and 1 bedroom units

Explanation for the Baseline Adjustments to the Distribution Of Household Sizes Utilized

N/A

Reporting Compliance with Statutory MTW Requirements: Maintain Comparable Mix							
Mix of Families Served							
	1 Person	2 Person	3 Person	4 Person	5 Person	6 + Person	Totals
Baseline Percentages of Household Sizes to be Maintained	45%	20%	28%	1%	0%	0%	94%
Number of Households Served by Family Size this Fiscal Year	1663	1111	839	174	32	3	3822
Percentage of Households Served by Household Size this Fiscal Year	44%	29%	22%	5%	0%	0%	100%
Percentage Change	-1%	9%	-6%	4%	0%	0%	6%

\*Sum of 0 and 1 bedroom units

Justification and Explanation for Family Size Variations of Over 5% from the Baseline Percentages

The percentage changes for 2 and 3 person households reflect the changes in OHA's tenant based population as the OHA has a significant amount of change in family composition, as a result of court ordered custody, marriage, etc. Additionally, members of the household move in and out.



Description of any Anticipated Issues Related to Leasing of Public Housing, Housing Choice Vouchers and/or Local, Non-Traditional Units and Possible Solutions	
Housing Program	Description of Leasing Issues and Solutions
Public Housing	<p>The chief issue related to leasing public housing units is that a substantial number of applicants fail the criminal background checks; however HUD has changed its stance on criminal background checks which should remedy this issue. OHA has also reduced the criminal background check eligibility period from ten years to five years.</p> <p>Other issues impacting public housing occupancy include mold, mildew, termites and VCA unit modifications. OHA has requested and received approval from HUD to remove units from occupancy in order to complete mold and mildew remediation and to repair damages caused by termites.</p>
Housing Choice Voucher (HCV)	<p>The chief issue relative to the leasing of HCVs is OHA's ability to pay the amount of the rent that an owner will accept. Typically, one of two scenarios occur: (1) the amount of rent that an owner requests may not be reasonable or (2) at the initial lease up, the client would be required to pay more than 40% of their adjusted income, which makes the home unaffordable. In some instances, owners are willing to work with clients and accept a lesser rent. However, some owners prefer not to rent unless they receive the amount of rent they request. OHA's possible solution is to negotiate with the owner such that the rent is in line with the rent reasonableness standards and up to 40% of the participant's income. In addition, OHA plans to consider increasing its payment standard.</p> <p>Funding is also a potential issue for the HCV program. OHA may not have enough administrative support to comply with HUD's leasing requirements.</p> <p>OHA has changed its HCV occupancy standards to be the same as public housing's minimum and maximum number of persons per bedroom for all bedroom sizes as a remedy to some of its leasing challenges.</p>

Number of Households Transitioned to Self-Sufficiency by Fiscal Year End		
Activity Name/#	Number of Households Transitioned	Agency Definition of Self-Sufficiency
<b>\$225 Rent Floor for Non-Elderly &amp; Non-Disabled Households/Activity 1</b>	6	Able to pay \$225/month in rent
<b>Households Duplicated Across Activities/Definitions</b>	0	
<b>ANNUAL TOTAL NUMBER OF HOUSEHOLDS TRANSITIONED TO SELF SUFFICIENCY</b> <i>(Also transitioned off of the MTW Resource Center Program)</i>	6	

### C. Wait List Information

Wait List Information at Fiscal Year End				
Housing Program(s)	Wait List Type	Number of Households on Wait List	Wait List Open, Partially Open or Closed	Was the Wait List Opened During the Fiscal Year
Federal MTW Public Housing	Community Wide	21,437	Open	Yes
Federal MTW Housing Choice Voucher Program	Community Wide	19,088	Closed	No
Federal MTW Public Housing Units	Site-Based* *This includes Hampton, Carver – Villas & Landings	646	Closed	No

Partially Open Wait Lists
N/A
Local, Non-Traditional Housing Program
N/A

Other Wait List Types	
N/A	
Changes to the Wait List or Policy Changes Regarding the Wait List	
Public Housing	N/A
Housing Choice Voucher	N/A

## SECTION III:

## PROPOSED ACTIVITIES



**OHA's Jackson Court Apartments**

### SECTION III: PROPOSED MTW ACTIVITIES

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

## SECTION IV:

## APPROVED ACTIVITIES: HUD APPROVAL PREVIOUSLY GRANTED



**OHA's Villas at Carver Park**



## SECTION IV: APPROVED MTW ACTIVITIES: HUD APPROVAL PREVIOUSLY GRANTED

### A. Implemented Activities

#### **Activity 1: \$225 Rent Floor for Non-Elderly and Non-Disabled Households**

Approval & Implementation Year: Activity 1 was first approved in FY 2012. The phased-in implementation began in the Initial Demonstration Period.

Description:

The purpose of this activity is to phase in the implementation of a self-sufficiency rent floor of \$225 for households that are not elderly and not disabled. The implementation of the rent floor includes a referral to the MTW Resource Center for non-elderly and non-disabled households not paying \$225 at the time the rent floor is implemented. The implementation of the \$225 rent floor provides hardship exceptions linked to self sufficiency activities.

The MTW Resource Center provides self sufficiency services including but not limited to case management, needs assessments, employability counseling, and job referral/placement assistance services for a maximum of two years for each adult referred to the MTW Resource Center. Use of a computer lab, transportation (bus passes) and child care assistance is provided to help participants secure and maintain employment. OHA monitors the progress of households subject to the rent floor relative to accomplishing the goals identified in their self sufficiency plan until sufficiency is reached. Since SHA vouchers are not in the OHA MTW block grant, self sufficiency services are not able to be offered to Sanford voucher holders.

Information on the activity's impact and comparison of outcomes to baselines and benchmarks:

During FY 2016, OHA referred thirty (30) residents from its public housing sites to the MTW Resource Center. A total of fifty (50) participants received services throughout the fiscal year. Six (6) of the participants that received services achieved self sufficiency, meaning, they were able to pay \$225 in rent. At the end of the year, there were forty one (41) active participants at the MTW resource center.

For SS # 1, tracking earned income, the FY16 participants earned a total of \$289,425 making the average household earned income of \$13,155 which is based upon 22 working participants. This number exceeds our benchmark of a 1% increase from the baseline average earned income.

For SS # 4, tracking households removed from TANF, OHA notes that although the benchmark was achieved, it does not necessarily indicate success because previous participants with TANF may have completed their two years in the resource center but continue to receive TANF assistance. OHA does not have the resources to track participants beyond their two years in the resource center.

For SS # 7, tracking the increase in tenant rent share, OHA notes that the requirements for the baseline are not conducive to accurately reflecting the increase in tenant rent payments of participants at the resource center. More specifically, the baseline data reflects the rent roll for the total OHA public housing population minus the elderly disabled sites but the outcome reflects only the population in the MTW resource center, meaning, residents that were unable to pay \$225. This data changes annually. When you review the average starting monthly rent for the MTW resource center participants (\$156) and compare it with the ending monthly rent for the MTW resource center participants (\$235), an increase is shown (\$79 per month).

Indicate whether the activity is on schedule:

This activity is on schedule according to the FY16 plan.

Hardship Requests: None.

Benchmarks Achieved: See metrics.

Benchmarks Revised: Yes. OHA changed the baseline for SS # 8 in order to more accurately track the progress of this activity.

Change in Data Collection methodology: No. However, the data used was from the month of May 2016.

Self Sufficiency				
SS # 1: Increase in Household Income				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase).	<u>Public Housing:</u> \$12,607*  <small>*This data is taken from the earned income of active residents of the MTW Resource Center as of 1/1/14</small>	<u>Public Housing:</u> \$12,733 or 5% increase	\$13,155	Yes
SS # 3: Increase in Positive Outcomes in Employment Status				
Unit of Measurement (Head of Household – HOH)	Baseline	Benchmark	Outcome	Benchmark Achieved?
<u>Public Housing &amp;</u>  (1) Employed Full-Time* (2) Employed Part-Time* (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other  <small>*The Resource Center only tracks whether participants/residents are employed, not whether they are employed full-time or part-time.</small>	<u>Public Housing &amp;</u>  (1) Employed - 0 (2) Employed - 0 (3) Enrolled in an Educational Program – 0* (4) Enrolled in Job Training Program – 0* (5) Unemployed - 0 (6) Other  OHA changed this baseline to reflect the number of active participants at the time this activity was approved which was 1/7/11.  <u>Section 8</u> - There is no Section 8 data because the HCV program has not yet	<u>Public Housing</u>  (1) Increase to 1 HOH or 5% of the current active participants  (2) Increase to 1 HOH or 5% of the current active participants  (3) Increase to 1 HOH or 5% of the current active participants  (4) Increase to 1 HOH or 5% of the current active participants  (5) Decrease to 1 HOH or 5% of the current active participants	22*   22*  4  1  19	Yes  Yes  Yes  Yes  No*

	been added to this activity.	<p>OHA changed the benchmark to reflect the current number of households that benefit from resource center services which will fluctuate each year.</p> <p>Note: The current active participants for FY 2016 was 41 as of May 31, 2016</p>		<p>*OHA notes that the requirements for the baseline are not conducive to accurately reflecting the changes in employment status of participants at the resource center.</p>
	<p><u>Public Housing &amp;</u></p> <p>(1) Employed – 0%  (2) Employed – 0%  (3) Enrolled in an Educational Program – 0%  (4) Enrolled in Job Training Program – 0%  (5) Unemployed – 0%</p> <p>*These numbers may not increase because once the participant transitions to self-sufficiency (paying \$225), they are no longer required to participate in services provided by the MTW Resource Center.</p> <p>OHA changed this baseline for Public Housing to reflect the number of active participants at the time this activity was approved which was 1/7/11. The Section 8 baseline reflects the number of active participants on 1/12/16 which is prior to the implementation of the HCV program to this activity.</p>	<p><u>Public Housing</u></p> <p>(1) 5% of the current active participants or 5% of HOHs  (2) 5% of the current active participants or 5% of HOHs  (3) 5% of the current active participants or 5% of HOHs  (4) 5% of the current active participants or 5% of HOHs  (5) 5% of the current active participants or 5% of HOHs</p>	<p>54%*</p> <p>54%*</p> <p>Less than 1%</p> <p>Less than 1%</p> <p>46%</p> <p>Note: The percentages add up to more than 100 because participants' status may apply to more than one category.</p>	<p>Yes</p> <p>Yes</p> <p>No*</p> <p>No*</p> <p>No*</p> <p>*OHA notes that the requirements for the baseline are not conducive to accurately reflecting the changes in employment status of participants at the resource center.</p>

<b>SS # 4: Households Removed from Temporary Assistance for Needy Families (TANF)</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households receiving TANF assistance (decrease)	7  Data is as of 1/15/14 and pertains only to active residents referred to the MTW Resource Center receiving TANF	6 or 1% decrease	1	Yes
<b>SS # 5: Households Assisted by Services that Increase Self Sufficiency</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households receiving services aimed to increase self sufficiency (increase)*  <u>Note:</u> Households receiving services are those that have received a referral and have had an assessment.  <u>Note:</u> Services aimed to increase self sufficiency are defined as the services associated with activity 1.  <u>Note:</u> Some households remain active in the resource center although they are paying \$225 because they continue to receive other services.	0  OHA changed this baseline to reflect the number of active participants at the time this activity was approved which was 1/7/11.  <u>Section 8</u> - There is no Section 8 data because the HCV program has not yet been added to this activity.	100% of the current active participants or 41  OHA changed the benchmark to reflect the current number of households that benefit from resource center services which will fluctuate each year.  <u>Note:</u> The current active participants for FY2016 were 41.	41	Yes
<b>SS # 6: Reducing Per Unit Subsidy Costs for Participating Households</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Average amount of Section 8 and/or 9 subsidy per households affected by this policy in dollars (decrease)	<u>Public Housing:</u> \$3,493  This data reflects the CY 2010 Average Subsidy per household per year. Note that although this activity does not include senior sites; they are included in the average subsidy data because they cannot be separated.  <u>Section 8:</u> N/A	\$3458 or 1% decrease  <u>Section 8:</u> N/A	\$3,073*  *OHA switched to FY data instead of CY data  <u>Section 8:</u> N/A	Yes  <u>Section 8:</u> N/A

SS # 7: Increase in Tenant Rent Share				
<i>Unit of Measurement</i>	<i>Baseline</i>	<i>Benchmark</i>	<i>Outcome</i>	<i>Benchmark Achieved?</i>
Tenant rent share in dollars (increase)	<p><u>Public Housing:</u></p> <p>\$3,285,474 total rent roll for CY2010 or \$249 per unit month*</p> <p>This data reflects the total rent revenue for CY2010 for the following public housing sites:</p> <ol style="list-style-type: none"> <li>1. Griffin Park</li> <li>2. Reeves Terrace</li> <li>3. Lake Mann</li> <li>4. Murchison Terrace</li> <li>5. Ivey lane Homes</li> <li>6. Citrus Square</li> <li>7. Omega</li> <li>8. Marden Meadows</li> </ol> <p>*Johnson Manor, Lorna Doone, Meadow Lakes, Hampton Park Villas have been excluded as they are senior sites.</p> <p><u>Section 8:</u> N/A</p>	<p><u>Public Housing:</u></p> <p>\$3,318,329 total rent roll or \$251 per unit month</p> <p><u>Section 8:</u> N/A</p>	<p><u>Public Housing:</u></p> <p>\$235 per unit month</p> <p><u>Section 8:</u> N/A</p>	<p><u>Public Housing:</u></p> <p>No*</p> <p>*OHA notes that the requirements for the baseline are not conducive to accurately reflecting the changes in employment status of participants at the resource center.</p> <p><u>Section 8:</u> N/A</p>
SS # 8: Households Transitioned to Self Sufficiency				
<i>Unit of Measurement</i>	<i>Baseline</i>	<i>Benchmark</i>	<i>Outcome</i>	<i>Benchmark Achieved?</i>
<p>Number of households transitioned to self sufficiency (increase)</p> <p>The PHA definition for "self sufficiency" is to be paying \$225 in monthly rent</p>	0	1 or 1% increase	6	<p>Yes</p> <p>*OHA notes that the requirements for the baseline are not conducive to accurately reflecting the progress of this particular metric - transition to self sufficiency.</p>



## **Activity 2: Streamline the Recertification in the Public Housing and Housing Choice Voucher Programs**

Approval & Implementation Year: This activity was first approved in FY 2012. Activity 2, in its current form, was approved in FY 2015 (November 2014). The phased-in implementation began in FY 2015.

Description: Activity 2 streamlines the recertification process in the public housing and housing choice voucher programs by conducting recertification of all residents and participants every three years (triennial). This means that every three years, residents and participants will come into the office to conduct the traditional recertification with the exception of a modified 3<sup>rd</sup> party verification and \$25,000 asset disregard.

OHA recertified one third of all residents and participants in FY 2015 and one-third in FY 2016. OHA will recertify the remaining one third of its residents and participants in FY 2017. Thereafter, OHA proposes to implement this activity by recertifying one third of its full population each year.

### *OHA Annual Online Updates*

In the years when residents and participants do not have their scheduled recertification, they will have an annual online update. OHA will use this as an opportunity to conduct an audit to review the household composition, tax return and criminal background check. During the annual online update, OHA will recalculate rent in the following circumstances:

1. If the total tenant payment (TTP) increases or decreases by \$100 or more; or
2. If the family size / household composition changes such that a person with new income is added to the household; or
3. Hardships; or
4. Criminal background checks leading to termination; or
5. Reasonable Accommodations

### *OHA Elimination of Interim Recertifications*

OHA will continue to streamline the recertification process by eliminating interim recertifications completely except for hardships, audits (including criminal background checks, change in family size/ household composition) and reasonable accommodations for all residents and participants.

In its FY 2016 MTW Plan, OHA received HUD approval to apply all aspects of this activity to NED, FUP, VASH and SHA vouchers.

Due to the extended recertification period, the OHA has created a local form 9886, Authorization for Release of Information. The local form captures the same information as the HUD form 9886 except that the resident/participant's consent for release of information will be extended from 15 months to 36 months as needed to update the resident/participant's data between each triennial recertification.

### Information on the activity's impact and comparison of outcomes to baselines and benchmarks:

For SS #4, tracking households removed from TANF, OHA achieved its benchmark for Section 8 and public housing. OHA notes improvement upon last year's results. For section 8, OHA's baseline was a total of 178 participants receiving TANF. In FY15, the number decreased to 145 and in FY16, it was further reduced to a total of 69 participants receiving TANF. For public housing, OHA's baseline was a total of 76 residents receiving TANF. In FY15, the number decreased to 69 and in FY16, it was further reduced to a total of 58 residents receiving TANF.

For CE # 1, agency cost savings, Section 8 estimates spending \$222,593 and public housing estimates spending \$373,667, which reflects an increase in task dollars from the baselines. The OHA believes the additional cost spent may be due in part to the time required for staff and clients to adjust to the new process. Once the learning curve of this process is reached, the OHA anticipates realizing a cost savings.

For CE # 2, staff time savings, Section 8 estimates spending an additional 5% on recertifications, totaling 70%. Public housing estimates spending 80% which is also an additional 5% of staff time on recertifications. OHA believes the additional time spent may be due in part to the time required for staff and clients to adjust to the new process. Additional follow up by staff is often required to encourage clients to complete the online updates. Also, some time is not saved because OHA continues to review its entire population annually by way of either the triennial recertification or the annual update.

Indicate whether the activity is on schedule: Yes, this activity is on schedule.

Hardship Requests: Section 8 had a total of 20 hardship requests. 11 were approved and 9 were denied. Public Housing had a total of 2 hardship requests. Both were approved.

Benchmark Achieved: Yes except CE # 1 and CE # 5.

Benchmarks Revised: Yes. See SS # 5.

Change in Data Collection Methodology: No.

Cost Effectiveness				
CE # 1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease)	<p><u>Section 8:</u> \$200,731*</p> <p>9,464 hours/year X \$21.21 (average hourly wage) = \$200,731</p> <p><u>Public Housing:</u> \$340,080</p> <p>12.480 hours/year X \$27.25 (average hourly wage)= \$340,080</p> <p>*These calculations include estimated benefits but do not include overhead costs.</p>	<p><u>Section 8:</u> \$100,365</p> <p><u>Public Housing:</u> \$170,040</p> <p>These amounts represent a 50% decrease for FY 2015</p>	<p><u>Section 8:</u> \$222,593</p> <p>10,192 hours/year X \$21.84 (average hourly wage) = \$222,593</p> <p><u>Public Housing:</u> \$373,667</p> <p>13,312 hours/year X \$28.07</p> <p>Note: These calculations are based upon an estimated time savings and resulting cost savings for recertifications.</p>	<p><u>Section 8:</u> No</p> <p><u>Public Housing:</u> No</p>

CE # 2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	<u>Section 8:</u> 9,464 hours  8 hours/day X 52 weeks/year = 2080 hours  2080 hours/year X 65% = 1352 hours X 7 employees = 9,464 hours  <u>Public Housing:</u> 12,480 hours  8 hours/day X 52 weeks/year = 2080 hours  2080 hours/year X 75% = 1560 hours X 8 employees = 12,480 hours	<u>Section 8:</u> 4,732 hours          <u>Public Housing:</u> 6,240 hours  These amounts represent a 50% decrease for FY 2015.	<u>Section 8:</u> 10,192 hours  8 hours/day X 52 weeks/year = 2080 hours  2080 hours/year X 70% = 1456 hours X 7 employees = 10,192 hours  <u>Public Housing:</u> 13,312  8 hours/day X 52 weeks/year = 2080 hours  2080 hours/year X 80% = 1664 hours X 7 employees = 13,312 hours  Note: These calculations are based upon an estimated time savings for recertifications.	<u>Section 8:</u> No          <u>Public Housing:</u> 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
CE # 5: Increase in Tenant Rent Share				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Tenant rent share in dollars (increase).	<u>Public Housing:</u> \$3,808,430 or \$234 per unit month*  *Data used is from FY 2103 total rent	<u>Public Housing:</u> \$3,821,125 or \$236 per unit month	<u>Public Housing:</u> \$4, 327,474 or \$284 per unit month	<u>Public Housing:</u> Yes

	of households because FY 2014 data is not yet available  <u>Section 8:</u> \$6,033,439** *Rent to Owners for FY 2013	<u>Section 8:</u> \$6,053,550 1% increase	<u>Section 8:</u> \$8,822,074	<u>Section 8:</u> Yes
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Self Sufficiency				
SS # 1: Increase in Household Income				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase)	<u>Section 8:</u> \$15,756  <u>Public Housing:</u> \$18,034  *This data is prior to the implementation of this activity, i.e. as of FY 2014 (1/8/14)	<u>Section 8:</u> \$15,914 or 1% increase  <u>Public Housing:</u> \$18,214 or 1% increase	<u>Section 8:</u> \$16,047  <u>Public Housing:</u> \$20,090	<u>Section 8:</u> Yes  <u>Public Housing:</u> Yes
SS # 3: Increase in Positive Outcomes in Employment Status				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Increase in Earned Income by HOH				
(1) Employed Fulltime	Average Earned Income			
(2) Employed Part Time	<u>Section 8:</u> N/A	<u>Section 8:</u> N/A	<u>Section 8:</u> N/A	N/A
(3) Enrolled in an Educational Program	<u>Public Housing:</u> N/A			
(4) Enrolled in Job Training Program		<u>Public Housing:</u> N/A	<u>Public Housing:</u> N/A	N/A
(5) Unemployed	Note: Since OHA does not have tracking methods in place for agency wide employment status, OHA cannot track this activity.			
(6) Other – Increase in Earned Income				

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

<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households receiving TANF assistance (decrease)	<p><u>Section 8:</u> 178</p> <p><u>Public Housing:</u> 76</p> <p>This data is as of 4/7/14. Note this is after the start of FY 2015 because the metric was not in OHA's initial plan submission. HUD requested this metric 3/31/14.</p>	<p><u>Section 8:</u> 1% or 2 households decreased</p> <p><u>Public Housing :</u> 1% or 1 household decreased</p> <p>OHA changed part of the explanation for the benchmark to reflect the actual number of households that 1% represents.</p>	<p><u>Section 8:</u> 69 or a decrease of 109</p> <p><u>Public Housing:</u> 58 or decrease of 18</p>	<p><u>Section 8:</u> Yes</p> <p><u>Public Housing:</u> Yes</p>

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

<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households receiving services aimed to increase self sufficiency (increase)*	<p>0</p> <p>OHA changed this baseline to reflect the number of active participants at the time this activity was approved which was 1/7/11.</p> <p>Note: The data in this metrics is only from the resource center participants.</p>	<p>100% of the current active participants or 41</p> <p>OHA changed the benchmark to reflect the number of households that utilized the resource center services. This number will fluctuate each year.</p> <p>Note: The current number of active participants for FY2016 was 41.</p>	41	Yes



SS # 8: Households Transitioned to Self Sufficiency				
<i>Unit of Measurement</i>	<i>Baseline</i>	<i>Benchmark</i>	<i>Outcome</i>	<i>Benchmark Achieved?</i>
<p>Number of households transitioned to self sufficiency (increase)</p> <p>The PHA definition for “self sufficiency” is to pay \$225 in monthly rent.</p>	<p>0</p> <p>OHA changed this baseline to reflect the number of participants at the time this activity was approved which was 1/7/11.</p>	<p>5% of the active participants or 2.5 participants</p> <p>Note: There were 50 participants in the resource center during FY2015.</p>	<p>6</p>	<p>Yes</p>

**Activity 6: Provide up to 50 One and Two Bedroom Units and Supportive Services at West Oaks Apartments for up to 24 Months for Homeless Individuals**

Approval & Implementation Year: Activity 6 was first approved in FY 2012. The phased in implementation began in FY 2014.

Description: Activity 6 was planned to provide up to 50 one bedroom units and supportive services for up to 18 months to homeless individuals at West Oaks Apartments, a 280 unit market rate multifamily property owned by OHA.

Information on the activity's impact and comparison of outcomes to baselines and benchmarks:

For HC # 1, number of housing units made available as a result of the activity, OHA notes that OHA notes that the requirements for this metric are not conducive to accurately reflecting the progress towards the goal of 50 project based vouchers for transitional housing. Although OHA projected based 13 new vouchers for transitional housing during FY16, this metric does not show that OHA has cumulatively project based 33 vouchers as of the end of FY16.

Indicate whether the activity is on schedule: Yes, this activity is on schedule.

Benchmarks Achieved: Yes.

Revised Benchmarks: No.

Changes in Data Collection methodology: No.

Cost Effectiveness				
CE # 1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars	\$2,310  *This calculation includes estimated benefits but does not include overhead costs.	\$0	N/A  Agency savings were realized in FY 2014	Yes
CE # 2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	2083 hours*	1042 hours  50% decrease for FY 2014	N/A  Agency savings were realized in FY 2014	Yes

# Housing Choice

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

<i>Unit of Measurement</i>	<i>Baseline</i>	<i>Benchmark</i>	<i>Outcome</i>	<i>Benchmark Achieved?</i>
Number of new housing units made available for households (homeless) at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household give that type in this box.	0	10 households or 20% increase	13  *OHA notes that the requirements for this metric are not conducive to accurately reflecting the progress towards the goal of 50 project based vouchers for transitional housing.	Yes

## HC # 5: Increase in Resident Mobility

<i>Unit of Measurement</i>	<i>Baseline</i>	<i>Benchmark</i>	<i>Outcome</i>	<i>Benchmark Achieved?</i>
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	0	10 households or 40% increase	13	Yes

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

<i>Unit of Measurement</i>	<i>Baseline</i>	<i>Benchmark</i>	<i>Outcome</i>	<i>Benchmark Achieved?</i>
Unit of Measurement Number of households receiving services aimed to increase housing choice (increase)	Baseline  0	Benchmark  10 households or 40% increase	Outcome  13	Benchmark Achieved?  Yes

## **Activity 8: Project-Based Vouchers in OHA Owned Units**

Approval & Implementation Year: Activity 8 was first approved in FY 2016. The phased in implementation began in FY 2016.

Description: OHA will project base up to 20% or 538 of its available tenant based section 8 vouchers at OHA owned units. HUD approved MTW flexibilities to allow OHA to implement this activity without engaging in a competitive process. OHA was also granted approval to conduct its own inspections and rent reasonableness functions.

OHA will implement its project-based voucher program at OHA-owned sites where there are no public housing units or other housing subsidies offered. Jackson Court, Division Oaks and West Oaks are approved sites for the project-based voucher program. The vouchers at West Oaks will be in addition to the PBV vouchers discussed in Activity 6 (transitional housing for the homeless). Although this activity contemplates that OHA will develop new properties or acquire existing properties at which OHA will project base-vouchers, no additional properties are anticipated for this activity at this time. The policies and processes for implementing the OHA PBV program will be the same as its tenant-based voucher program.

Information on the activity's impact and comparison of outcomes to baselines and benchmarks:

For CE #1 and #2, the savings in cost and staff hours are a result of MTW flexibilities that allowed OHA to waive the competitive bidding process.

Indicate whether the activity is on schedule: OHA currently has zero project based vouchers at Jackson Court/Division Oaks and West Oaks for this activity. Jackson Court has completed a significant portion of the administrative requirements and is reviewing applicants' eligibility. West Oaks is presently 100% occupied. However, as units become available, OHA may apply project based vouchers to the units.

Benchmarks Achieved: Yes.

Revised Benchmarks: No.

Changes in Data Collection methodology: No.

## Cost Effectiveness

### CE # 1: Agency Cost Savings

<i>Unit of Measurement</i>	<i>Baseline</i>	<i>Benchmark</i>	<i>Outcome</i>	<i>Benchmark Achieved?</i>
Total cost of task in dollars (decrease).	\$2,310	\$0	\$0	Yes  Note: This metrics only applies to the waiver of the competitive bidding process

### CE # 2: Staff Time Savings

<i>Unit of Measurement</i>	<i>Baseline</i>	<i>Benchmark</i>	<i>Outcome</i>	<i>Benchmark Achieved?</i>
Total time to complete the task in staff hours (decrease).	Procurement – 24 hours  Administration - 10 hours  Project Management – 8 hours	Procurement – 0 hours  Administration- 0 hours  Project Management – 0 hours	Procurement – 0 hours  Administration- 0 hours  Project Management – 0 hours	Yes  Note: This metrics only applies to the waiver of the competitive bidding process

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

<i>Unit of Measurement</i>	<i>Baseline</i>	<i>Benchmark</i>	<i>Outcome</i>	<i>Benchmark Achieved?</i>
Average error rate in completing a task as a percentage (decrease)	0%	0%	0	Yes

## **Activity 9: Establishment of Agency-Wide \$100 Minimum Rent**

Approval & Implementation Year: Activity 9 was first approved in FY 2016. The phased in implementation began in FY 2016.

Description: In FY2016, OHA requested the MTW flexibilities to establish a minimum rent that exceeds \$50 for both public housing and the housing choice voucher program. OHA requested approval to establish an agency-wide minimum rent of \$100. Agency-wide programs will include public housing, tenant-based rental assistance vouchers and project-based vouchers. In FY2016, OHA received approval to apply the \$100 minimum rent agency-wide including SHA, FUP, NED, Port-ins, and VASH vouchers. The households shall pay rent of at least \$100 after the provision of utility allowances.

Information on the activity's impact and comparison of outcomes to baselines and benchmarks:

For CE #5 (public housing), increase in agency rental revenue, the benchmark was established by calculating projected revenue for the 46 residents paying less than \$100 per month. OHA calculated the difference between the amount of rent the 46 residents were paying prior to the implantation of the \$100 minimum rent and the amount of rent these 46 residents would pay once the \$100 minimum rent was established. This calculation amounted to \$55,200 in anticipated rental revenue. In order to determine the outcome for this metrics for FY16, OHA calculated the difference in agency wide rental revenue between FY15 (\$3,553,546) and FY16 (\$4,327,474) which was \$773,928. OHA was able to confirm that the rental revenue increased by more than \$55,200.

For CE #5 (section 8), increase in agency rental revenue, the benchmark was established by calculating projected revenue for the 891 participants paying less than \$100 per month. OHA calculated the difference between the amount of rent the 891 participants were paying prior to the implantation of the \$100 minimum rent and the amount of rent these 891 participants would pay once the \$100 minimum rent was established. This calculation amounted to \$1,069,200 in anticipated rental revenue. In order to determine the outcome for this metrics for FY16, OHA calculated the difference in rent to owners between FY15 (\$7,925,926) and FY16 (\$8,822,074) which was \$896,148. Unfortunately, OHA was not able to confirm that the rent to owners increased by more than \$1,069,200. A factor that may have contributed to the shortfall is OHA's decision not to implement the \$100 minimum rent activity for its VASH voucher holders. 221 VASH vouchers were included in our original baseline and calculation of projected rent to owner revenue.

There were no hardships, for this activity, in either the public housing or HCV programs.

Indicate whether the activity is on schedule: Yes, this activity is on schedule.

Benchmarks Achieved: See metrics.

Revised Benchmarks: Yes. For consistency, OHA changed SS # 3 to match SS # 3 in activity 2 since they request data. Also, OHA changed the baseline for SS # 8 in order to more accurately track the progress of this activity.

Changes in Data Collection methodology: No.

## Cost Effectiveness

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
<b>CE # 5: Increase in Agency Rental Revenue</b>				
Rental revenue in dollars (increase)	<p>Public Housing: \$42,936 per year</p> <p><u>Note:</u> Calculation based rents paid by the 46 residents paying less than \$100 as of 8/26/14 multiplied by 12 months **This figure does not include the Villas at Carver Park and the Landings at Carver Park</p> <p><u>Section 8:</u> \$319,332 per year in tenant rent to owners</p> <p><u>Note:</u> Calculation is based upon the tenant rent to owners for the 891 participants paying less than \$100 in rent as of 8/26/14 multiplied by 12 months</p>	<p>Public Housing Increase of \$12,264 or a total of \$55,200 in rental revenue</p> <p><u>Note:</u> This figure was calculated by the summing the difference between \$100 and the rents currently paid by the 46 residents paying less than \$100 per month times 12 months</p> <p><u>Section 8</u> Increase of \$749,868 or a total of \$1,069,200 in tenant rent to owners and corresponding subsidy savings</p> <p><u>Note:</u> This figure was calculated by the summing the difference between \$100 and the rents currently paid by the 891 participants paying less than \$100 per month times 12 months</p>	<p>\$4,327,474 in total rental revenue</p> <p><u>Section 8</u> \$8,822,074 in total tenant rent payments to owners</p>	<p>Yes</p> <p><u>Section 8</u> No</p>



		These figures are only estimates in that these calculations assume that all residents & participants will actually pay \$100		
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Self Sufficiency				
SS # 1: Increase in Household Income				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase).	<u>Section 8:</u> \$15,756  <u>Public Housing:</u> \$18,034  Note: This data is as of FY 2014 (1/8/14)	<u>Section 8:</u> \$15,914 or 1% increase  <u>Public Housing:</u> \$18,214 or 1% increase	<u>Section 8:</u> \$16,047  <u>Public Housing:</u> \$20,090	<u>Section 8:</u> Yes  <u>Public Housing:</u> Yes
SS # 3: Increase in Positive Outcomes in Employment Status				
Unit of Measurement (Head of Household – HOH)	Baseline	Benchmark	Outcome	Benchmark Achieved?
(1) Employed Fulltime	Average Earned Income			
(2) Employed Part Time	<u>Section 8:</u> N/A	<u>Section 8:</u> N/A	<u>Section 8:</u> N/A	N/A
(3) Enrolled in an Educational Program	<u>Public Housing:</u> N/A	<u>Public Housing:</u> N/A	<u>Public Housing:</u> N/A	N/A
(4) Enrolled in Job Training Program				
(5) Unemployed				
(6) Other – Increase in Earned Income	Note: Since OHA does not have tracking methods in place for agency wide employment status, OHA cannot track this activity.			

<b>SS # 4: Households Removed from Temporary Assistance for Needy Families (TANF)</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households receiving TANF assistance (decrease)	<u>Section 8:</u> 178  <u>Public Housing:</u> 76  This data is as of 4/7/14. Note this is after the start of FY 2015 because the metric was not in OHA's initial plan submission. HUD requested this metric 3/31/14.	<u>Section 8:</u> 1% or 2 households decreased  <u>Public Housing :</u> 1% or 1 household decreased  OHA changed part of the explanation for the benchmark to reflect the actual number of households that 1% represents.	<u>Section 8:</u> 69 or a decrease of 109  <u>Public Housing:</u> 58 or decrease of 18	<u>Section 8:</u> Yes  <u>Public Housing:</u> Yes
<b>SS # 8: Households Transitioned to Self Sufficiency</b>				
<b>Unit of Measurement</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>	<b>Benchmark Achieved?</b>
Number of households transitioned to self sufficiency (increase)*  The PHA definition for "self sufficiency" is to be paying \$225 in monthly rent.  <u>Note:</u> The data in this metric is only from the resource center participants (activity 1).	0	1 or 1% increase	6	Yes  *OHA notes that the requirements for the baseline are not conducive to accurately reflecting the progress of this particular metric - transition to self sufficiency.

## **Activity 10: Tenant-Based Voucher Homelessness Prevention Program**

Approval & Implementation Year: Activity 10 was first approved in FY 2016. The phased in implementation began in FY 2016 with the City of Orlando and OHA executing a memorandum of understanding.

Description: OHA and the City of Orlando are partnering to administer a voucher program to address chronic homelessness as a part of the 25 Cities Initiatives. The Orlando Veteran's Affairs Medical Center is also a participant. Chronic homelessness is defined as adults with a disabling condition who have been continuously homeless for at least one year or have had four episodes of homelessness in the past three years. The disabling condition(s) limits an individual's ability to work or perform one or more activities of daily living and is defined as a diagnosable substance use disorder, serious mental illness, developmental disability or chronic physical illness.

In this activity, OHA will provide vouchers and the City of Orlando will provide services for approximately 150 chronically homeless persons identified by the City of Orlando. Depending on funding availability, the City of Orlando will provide approximately \$4,000 in services annually per household served. The City of Orlando funding will be used to provide an estimated 10 case managers to handle an average of 15 clients per case manager. The City of Orlando will refer the chronically homeless persons under case management to OHA. Once confirmed eligible, these referrals will bypass the section 8 wait list and other eligibility criteria.

OHA will also partner with other agencies that can provide supportive services to increase OHA's ability to house the chronically homeless.

Information on the activity's impact and comparison of outcomes to baselines and benchmarks: Not applicable as OHA is awaiting referrals from the City of Orlando.

Indicate whether the activity is on schedule: No. OHA is awaiting referrals from the City of Orlando.

Benchmarks Achieved: See metrics.

Revised Benchmarks: Yes. For consistency, OHA changed SS # 3 to match SS # 3 in activity 2 since they request data.

Changes in Data Collection methodology: No.

## Housing Choice

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

<i>Unit of Measurement</i>	<i>Baseline</i>	<i>Benchmark</i>	<i>Outcome</i>	<i>Benchmark Achieved?</i>
Average applicant time on wait list in months (decrease)	0	0 *Participants may experience a short delay due to unavailability of a voucher	N/A	N/A

### HC # 5: Increase in Resident Mobility

<i>Unit of Measurement</i>	<i>Baseline</i>	<i>Benchmark</i>	<i>Outcome</i>	<i>Benchmark Achieved?</i>
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	0	50	N/A	N/A

## Cost Effectiveness

### CE # 1: Agency Cost Savings

<i>Unit of Measurement</i>	<i>Baseline</i>	<i>Benchmark</i>	<i>Outcome</i>	<i>Benchmark Achieved?</i>
Total cost of task in dollars (decrease)	\$0	\$424 / month  <u>Note:</u> This calculation is based upon an estimated 4 hours to determine initial eligibility x \$21.21 in average wage/ hour x 5 participants / month	N/A	N/A

### CE # 2: Staff Time Savings

<i>Unit of Measurement</i>	<i>Baseline</i>	<i>Benchmark</i>	<i>Outcome</i>	<i>Benchmark Achieved?</i>
Total cost of task in dollars (decrease)	\$0	\$424 / month  <u>Note:</u> This calculation is based upon an estimated 4 hours to determine initial eligibility x \$21.21 in average wage/ hour x 5 participants / month	N/A	N/A

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

<i>Unit of Measurement</i>	<i>Baseline</i>	<i>Benchmark</i>	<i>Outcome</i>	<i>Benchmark Achieved?</i>
Average error rate in completing a task as a percentage (decrease)	\$0%	0%	N/A	N/A

**B. Not Yet Implemented**

No activities.

**C. On Hold**

No activities.

**D. Closed Out Activities**

No activities.

## SECTION V:

## SOURCES AND USES OF FUNDS



**OHA's Villas at Hampton**

## SECTION V: SOURCES AND USES OF FUNDS\*

### A. Sources and Uses of Funds

Actual Sources and Uses of MTW Funding for the Fiscal Year
OHA submitted their unaudited information in FDS through the Financial Assessment System – PHA (FASPHA) on June 10, 2016.
Describe the Activities that Will Use Only MTW Single Fund Flexibility
In addition to the activities described above, OHA continues to use the MTW Single Fund Flexibility to support Uses of Funds A, B, and C.
Use of Funds A: Comprehensive One-Stop Self-Sufficiency Resource Center
<p>Use of Funds Action A is to provide a Comprehensive One-Stop Self-Sufficiency Resource Center. The MTW Resource Center is linked to MTW Activity 1 – Phase in the implementation of a self-sufficiency rent floor of \$225 for households which are not elderly and not disabled. The implementation of the rent floor includes a referral to the MTW Resource Center for non-elderly and non-disabled households not paying \$225 at the time the rent floor is implemented. For the first five years, only public housing residents were referred to the Resource Center. However, in FY 2017, OHA will begin to phase-in non-elderly and non-disabled housing voucher program participants that are not paying the rent floor of \$225. The implementation of the \$225 rent floor provides hardship exceptions linked to self sufficiency activities conducted at the MTW Resource Center.</p> <p>The MTW Resource Center provides self sufficiency services, including but not limited to, case management, needs assessments, employability counseling, and job referral/placement assistance services for a maximum of two years for each adult referred. Use of a computer lab, transportation (bus passes) and child care assistance is provided to help participants secure and maintain employment. OHA monitors the progress of households subject to the rent floor relative to accomplishing the goals identified in their self sufficiency plan until self-sufficiency is reached.</p> <p>In the past, the MTW Resource Center has partnered with a number of agencies to provide services to residents referred to the Resource Center. The Resource Center plans to continue to develop and foster relationships that will help OHA's residents and participants become more self-sufficient.</p> <p>The MTW Resource Center will continue to establish relationships with employers to facilitate job referrals and consequently strengthen and/or build economic self-sufficiency for OHA participants and residents. In addition, the Resource Center will extend its partnership with CareerSource (formerly Work Force Center Florida) using its mobile unit to bring employability workshops every fourth Thursday to the MTW Resource Center.</p> <p>The MTW Resource Center currently has 41 active participants receiving a variety of self-sufficiency services. In addition, the Resource Center has formulated partnerships with more than 125 business partners and employers to improve job opportunities.</p>
Use of Funds B: The Greening of OHA
<p>As part of Use of Funds B, OHA conducted the following:</p> <p><i>Energy Conservation Workshops</i></p> <p>In June 2013, the OHA collaborated with Orlando Utilities Commission (OUC) and Duke Energy to hold</p>



MTW Green- Energy Conservation Workshops at Ivey Lane Homes. OHA proposes to conduct workshops during FY 2017 in an effort to educate residents on energy usage and conservation. The ultimate goal of this effort is to reduce residents' energy consumption and consequently decrease their energy bills. OHA will also continue to collect workshop participants' signed authorizations to permit the OHA to track their individual energy usage and make personalized recommendations for additional energy conservation measures, if indicated.

OHA completed Green-Energy Conservation Workshops in FY14 at Ivey Lane Homes, Marden Meadows and Omega. In FY15, OHA completed Green-Energy Conservation Workshops at Johnson Manor, Reeves Terrace, Murchison, Meadow Lake, Villas at Carver and Villas at Hampton.

#### **Use of Funds C: Effective Evaluation of MTW Initiatives**

Use of Funds Action C is to provide for an effective evaluation of MTW Initiatives. The evaluation of OHA's FY 2013 MTW Program was conducted by the University of Central Florida (UCF)'s Institute for Social and Behavioral Science. Since that time OHA has closed out several activities that it determined were not effective, re-proposed activities and added new activities. For these reason, OHA will not have an evaluation conducted of its FY 2015 MTW program.

### **B. MTW Plan: Local Asset Management Plan**

<b>Local Asset Management Plan</b>	
<b>Sources</b>	
Is the PHA allocating costs within statute?	Yes
Is the PHA implementing a local asset management plan (LAMP)?	Yes
Has the PHA provided a LAMP in the appendix?	Yes

### **C. Commitment of Unspent Funds**

N/A

## SECTION VI: ADMINISTRATIVE



**OHA's Omega Apartments – Public Housing**

## SECTION VI: ADMINISTRATIVE

### **A. General description of any HUD reviews, audits or physical inspection issues that require the agency to take action to address the issue**

The Orlando Housing Authority executed two (2) Voluntary Compliance Agreements (VCA) in FY 2016. The agreements cover the areas of 504/ADA and Section 3. Both agreements are for a three year period. OHA have submitted quarterly reports to HUD covering its progress toward compliance. Construction is underway on twenty five UFAS/Section 504 accessible units pursuant to the 504/ADA VCA.

### **B. Results of Latest PHA-directed evaluations of the demonstration, as applicable; and**

The agency evaluation for FY 2013 was completed by the University of Central Florida Institute of Social and Behavioral Science. Since that time OHA has closed out several activities that it determined were not effective and re-proposed activities. For these reason, OHA did not have an evaluation conducted of its FY 2016 MTW program.

### **C. Certification Statement**

[Certification Statement to Follow]



## ORLANDO HOUSING AUTHORITY

### MOVING TO WORK (MTW) (APRIL 1, 2015 TO MARCH 31, 2016)

#### Section VI.C Certification Statement

The Housing Authority of City of Orlando, Florida (OHA) hereby certifies that the Agency has met the following three statutory requirement of the Moving to Work Demonstration Program:

- 1) At least 75 percent of families assisted by the agency are very low income families;
- 2) The agency continues to assist substantially the same total number of eligible low income families as would have been served had the amounts not been combined; and
- 3) The agency maintains a comparable mix of families (by family size), as would have been provided had the amounts not been used under the Demonstration Program.

Vivian Bryant, Esq.  
President/CEO

Date

## SECTION VII: APPENDIX

### A. Local Asset Management Plan

As part of the Orlando Housing Authority's Amended and Restated Moving to Work Agreement, effective January 7, 2011, OHA has designed and implemented its Local Asset Management Program. OHA is going to continue to implement its local asset management program for its Public Housing Program and describe such program in its Annual MTW Plan. The term "Public Housing Program" means the operation of properties owned or subsidized by the Agency that are required by the U.S. Housing Act of 1937. The Agency's local asset management program includes a description of how it's implementing project-based property management, budgeting, accounting, and financial management and any deviations from HUD's asset management requirements. OHA describes its cost accounting plan (cost allocation plan) as part of its local asset management program.

OHA maintains a project-based management approach which includes both OHA-managed properties and its as privately managed properties, under the Public Housing Program. Project-level budgeting and accounting is maintained for each of these Public Housing properties. In addition, mixed-finance rental community that contains Agency-assisted units under the Public Housing Program are owned, managed and operated by third party partnerships.

OHA has developed its program to ensure that accounting and financial reporting methods comply with OMB Circular A-87 regarding cost allocations, OMB Circular A-133 regarding audit requirements, and generally accepted accounting practices (GAAP).

OHA's Public Housing Program's local asset management plan applies the following principles related to program costs:

- Costs incurred are deemed reasonable and consistent with the amended Moving to Work Agreement.
  - Costs shall be accorded consistent treatment.
  - Costs shall be determined in accordance with GAAP.
  - Costs are adequately documented.
  - OHA will report results according to HUD MTW guidelines.
1. Budgeting and accounting – Operating budgets are developed and maintained annually at the property level. The groupings of like properties in a geographic location are called Asset Management Properties (AMPs). The related accounting activities are maintained at that level as well.
  2. Financial management – Financial reporting and analysis is performed and monitored on a monthly basis, at the property level. Financial reporting requirements are in accordance with the amended Moving to Work Agreement as well as OMB Circular A-87.
  3. Cost Allocation Approach  
OHA's Amended and Restated Moving to Work Agreement identifies either a "cost allocation" or "fee-for-service" option. OHA utilizes the cost allocation method. OHA is in keeping with 24 CFR 990 and uses property level management, accounting, and budgeting and has established a Central Office Cost Center (COCC). The costs of the COCC are allocated not only to Public Housing, but to the other programs managed by OHA.

All direct and indirect costs are charged to the AMPs in accordance with OMB Circular A-87. A cost may be direct with respect to some specific service or function, but indirect with respect to the final cost objective. Direct costs associated with project activities are allocated to the specific properties receiving the benefit of the expenditure. Direct and indirect costs associated with the COCC are allocated on a reasonable basis and, if allocated to public housing properties, are substantially done using a project unit distribution basis.

OHA has developed this program to ensure that accounting and financial reporting methods comply with OMB Circular A-87 regarding cost allocations, OMB Circular A-133 regarding audit requirements, and generally accepted accounting practices (GAAP).

### **Cost Allocation Plan**

Under the MTW Agreement, the cost accounting options available to the Agency include either a “cost allocation” or “fee-for-service” methodology. OHA approached its cost allocation plan with consideration to the entire operation of the Agency including the MTW Program. This cost allocation plan addresses the larger OHA operation as well as the specific information related to the MTW Program.

### **Difference**

OHA has the ability to define direct costs differently than the standard definitions published in HUD’s Financial Management Guidebook pertaining to the implementation of 24 CFR Part 990.

OHA determined to implement a cost allocation system that allocates COCC costs to all agency-wide programs. HUD’s Asset Management System focuses primarily on allocating costs to the Asset Management Properties (AMPs) and necessarily to other programs. This Cost Allocation Plan addresses the entire OHA operation.