

**FY2017**

**Moving to Work (MTW) Report**



**Orlando Housing Authority**

**Executive Office**

**April 1, 2016 through  
March 31, 2017**

# FY2017 Moving to Work (MTW) Annual Report

April 1, 2016 – March 31, 2017

## Table of Contents

## PAGE

### **Section I: Introduction**

**3-5**

#### **A. Overview of OHA's Short-Term and Long-Term Goals and Objectives**

4-5

MTW Activities

4

Non-MTW Activities

4-5

### **Section II: General Housing Authority Operating Information**

**6-11**

#### **A. Housing Stock Information**

7-8

New Housing Choice Vouchers to be Project-Based During the Fiscal Year

7

Other Changes to the Housing Stock Anticipated During the Fiscal Year

7

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

8

Overview of Other Housing Owned/Managed by the PHA as Fiscal Year End

8

#### **B. Leasing Information**

8-10

Actual Number of Households Served at the End of the Fiscal Year

8

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

9

Reporting Compliance with Statutory MTW Requirements: Maintain Comparable Mix

9

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

10

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

10

#### **C. Wait List Information**

10-11

Wait List Information at Fiscal Year End

10

Partially Open Wait Lists

11

Local, Non-Traditional Housing Program

11

Other Wait List Types

11

Changes to the Wait List or Policy Changes Regarding the Wait List

11

### **Section III: Proposed MTW Activities**

**12-13**

None

### **Section IV: Approved MTW Activities**

**14-37**

#### **A. Implemented Activities**

15-37

Activity 1: \$225 Rent Floor for Non-Elderly & Non-Disabled Households

15-19

Activity 2: Streamline the Recertification in Public Housing & Housing Choice Voucher Programs

20-25

Activity 6: Provide Up to 50 One & Two Bedroom Units & Supportive Services At West Oaks Apartments

26-28

Activity 8: Project Based Vouchers in OHA Owned Units

29-30

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

31-34

Activity 10: Tenant-Based Voucher Homelessness Prevention Program

35-37

<b>B. Not Yet Implemented Activities</b>	37
NONE	
<b>C. Activities on Hold</b>	37
NONE	
<b>D. Closed Out Activities</b>	37
NONE	
<b><u>Section V: Sources and Uses of Funds</u></b>	<b>38-40</b>
<b>A. Sources and Uses of MTW Funds</b>	39-40
Actual Sources of MTW Funding for the Fiscal Year	39
Actual Uses of MTW Funding for the Fiscal Year	39
Description of Activities that Will Use Only MTW Single Fund Flexibility	39-40
<b>B. Local Asset Management Plan</b>	40
Local Asset Management Plan	40
<b>C. Commitment of Unspent Funds</b>	40
Not Applicable	
<b><u>Section VI: Administrative</u></b>	<b>41-43</b>
<b>A. General Description of HUD reviews, audits that require the agency to take action</b>	42
<b>B. Results of Latest PHA Directed Evaluations</b>	42
<b>C. Certification Statement</b>	43
<b><u>Section VII: Appendix</u></b>	<b>44-46</b>
<b>A. Local Asset Management Plan</b>	45-46

# SECTION I: INTRODUCTION

## SECTION I: INTRODUCTION

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

#### **MTW Activities**

As an MTW agency, the 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 cost 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 sixth year as an MTW Agency, the OHA achieved significant success in the implementation of Activities 1, 2, 6, 8 and 9. Although there has been some progress, Activity 10 remains in the early stages of development. OHA looks forward to the expansion of its MTW program.

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

#### **Non-MTW Activities**

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

- (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 to support and assist residents and participants not involved in the MTW program. For uniformity, the OHA received HUD approval to extend the MTW flexibilities for the housing choice voucher program to the Sanford Housing Authority (SHA) vouchers. Also, the OHA is now able to apply the flexibilities to its SRO program, as well.

The OHA's non-public housing complexes are West Oaks Apartments (280 one and two bedroom units) and Antioch Manor, a project-based section 202 property, (101 one bedroom units for the elderly). The OHA's other non-public housing complex is the 75 unit Jackson Court/Division Oaks Development, which is owned by Orlando Properties Inc. Jackson Court is a 58 unit, three story senior housing apartment complex with one bedroom units. Division Oaks is a two story, 17 unit family apartment complex.

In addition, the 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 and 30 tax credit/public housing hybrid units). The Villas at Carver Park is a 64 unit (1 bedroom) tax credit/public housing apartment complex for the elderly.

Lift Orlando, a local non-profit organization whose mission is to break the cycle of poverty through neighborhood revitalization, has partnered with the OHA to redevelop Orlando's Washington Shores community –Pendana, formerly The Villages of West Lakes. Now Washington Shores includes the OHA's Lake Mann Homes and Lorna Doone Apartments. Lift Orlando has embarked on the redevelopment of a significant area of blighted housing west of downtown Orlando. Demolition is underway and construction of new housing is projected to be completed by the summer of 2018. The OHA is partnering by providing 20 project-based vouchers to improve affordability for low-income families. The OHA and Lift Orlando may apply for the Choice Neighborhoods Action grant for Lake Mann Homes and/or Lorna Doone Apartments.

The 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 quality, affordable housing options are available to the community.

### **Rental Assistance Demonstration Program**

In March 2015, the OHA received HUD approval for a Rental Assistance Demonstration (RAD) Portfolio application for Citrus Square Apartments (87 units). The approval also provided the opportunity for the OHA to submit an application in FY2017 to convert the units located at Lorna Doone Apartments (104 units). HUD approval is pending. Additionally, the OHA received HUD's approval to implement the RAD program in January 2016.

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

The OHA continues to manage the Sanford Housing Authority. The goals and objectives for SHA are to redevelop its former public housing sites. All SHA public housing units were demolished by December 2015, and the OHA submitted a Choice Neighborhoods Planning grant application on behalf of SHA. In FY2016, the SHA was awarded the Choice Neighborhoods Initiative (CNI) Planning grant in the amount of \$500,000. This grant will support the development of a comprehensive neighborhood transformation plan for Castle Brewer Court, William Clark Court, Edward Higgins Terrace, Cowan Moughton Terrace, and Lake Monroe Terrace in the Goldsboro neighborhood. This planning effort also includes the nearby Academy Manner. The CNI planning will be completed in FY2018. Additionally, the OHA and SHA will seek other opportunities that support the redevelopment of former public housing sites.



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

### **Standard HUD Metrics**

HUD recently modified the MTW metrics. The OHA has developed metrics that apply to the OHA's MTW activities consistent with HUD's modifications; although, the metrics presented in this report may be modified further.

# **SECTION II: GENERAL HOUSING AUTHORITY OPERATING INFORMATION**

## 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	30	<p><b>Activity 6: Transitional Housing</b>                      West Oaks Apartments is a three story, 280 unit, affordable market rate rental property in which the OHA plans to project base up to fifty units to provide transitional housing to homeless individuals for up to eighteen months. The 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 forty vouchers/units are to be committed by the end of FY2017.</p>
West Oaks	20	0	<p><b>Activity 8: Project Based Vouchers in OHA Units</b>                      West Oaks Apartments is a three story, 280 unit, affordable market rate rental property in which OHA desires to project base up to 20% or 538 of its available tenant based HCV vouchers at OHA owned units. OHA anticipates transitioning 50 units over a 10 year period (in addition to the vouchers to be used in connection with Activity 6).</p>

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*
30	30	135	135

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
155	155

Other Changes to the Housing Stock that Occurred During the Fiscal Year
The OHA had a number of units offline due to fire, mold, termites, and VCA related construction.



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

In FY2017, the OHA Capital Fund expenditures included \$857,478 for the public housing sites' Capital Fund Financing Program loan repayment to Deutsche Bank.

The OHA spent \$450,000 on the Voluntary Compliance Agreement with HUD for improvements to the physical accessibility of the 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.

The OHA also expended \$700,000 on capital improvements across its various properties. This includes ceiling repairs, parking lot replacement, elevators, and costs/fees associated with the RAD conversion at Citrus Square Apartments.

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

Housing Program	Total Units	Overview of the Program
Non-MTW HUD Funded	1253	HUD subsidized housing not included in the MTW block grant.
Other	541	Sanford Housing Authority HCV vouchers administered by the OHA.
	<b>1794</b>	

\* **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

## B. Leasing Information

### Actual Number of Households Served at the End of the Fiscal Year

Housing Program	Number of Households Served	
	Planned	Actual
<b>MTW Households Served Through:</b>		
Number of Units that were Occupied/Leased Through Local, Non-Traditional, MTW Funded, Property-Based Assistance Programs	1458	1330
Number of Units that were Occupied/Leased through Local, Non-Traditional, MTW Funded, Tenant-Based Assistance Programs** (MTW + homeownership + port outs)	2394*	2500
Port-In Vouchers (not absorbed)	0	323
<b>Total Projected and Actual Households Served</b>	<b>3852</b>	<b>4153</b>

\*This number has been updated to reflect the correct baseline, which differs from the baseline stated in the FY2017 Plan.

### Actual Number of Households Served at the End of the Fiscal Year

Housing Program	Unit Months/Occupied/Leased	
	Planned	Actual
<b>MTW Households Served Through:</b>		
Number of Units that were Occupied/Leased Through Local, Non-Traditional, MTW Funded, Property-Based Assistance Programs	17496	15960
Number of Units that were Occupied/Leased through Local, Non-Traditional, MTW Funded, Tenant-Based Assistance Programs (MTW + homeownership + port outs)	28716*	30000
Port-In Vouchers (not absorbed)	0	3876
<b>Total Projected and Annual Units Months Occupied/Leased</b>	<b>46212</b>	<b>49836</b>

\*This number has been updated to reflect the correct baseline, which differs from the baseline stated in the FY2017 Plan.

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

The OHA had a number of public housing units offline due to fire, mold, termites, and VCA related construction reducing the number of households assisted. Furthermore, through tenant and project-based vouchers, the OHA was able to assist additional HCV households.

	Average Number of Households Served Per Month	Total Number of Households Served During the Year
Households Served through Local Non-Traditional Services Only	N/A	N/A

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

Fiscal Year	2013	2014	2015	2016	2017
Total Number of Local, Non-Traditional MTW Households Assisted	N/A	4413	4360	4141	3830
Number of Local, Non-Traditional MTW Households with Incomes Below 50% of the Area Median Income	N/A	4426*	4114*	3517	3539
Percentage of Local, Non-Traditional MTW Households with Incomes Below 50% of the Area Median Income	N/A	96%	94%	85%	92%

\*Note: Non-MTW vouchers were included in this fiscal year 9

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

Baseline for the Mix of Family Sizes Served					
Family Size:	Occupied Number of Public Housing Units by Household Size When PHA Entered MTW	Utilized Number of HCV 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 Percentage of Family Sizes to be Maintained
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%
Totals	1463	2578	N/A	4041	94%

\*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	1629	1068	899	194	35	5	3830
Percentage of Households Served by Household Size this Fiscal Year	43%	28%	23%	5%	1%	0%	100%
Percentage Change	-2%	8%	-5%	4%	1%	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 2-3 person households reflect the changes in the OHA's tenant based population as (1) the OHA has a significant amount of change in family composition, as a result of court ordered custody, marriage, etc and because (2) members of the household move 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. The 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. The 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 the 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. 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. The 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. Also, the OHA will continue to conduct presentations for the local realtor association(s) to increase the landlord pool for the OHA participants. (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. As a remedy, the OHA has agreed to increase its payment standard to 110%.</p> <p>Funding is also a potential issue for the HCV program. The OHA may not have enough administrative support to comply with HUD's leasing requirements.</p> <p>The 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
\$225 Rent Floor for Non-Elderly & Non-Disabled Households/Activity 1	50	Able to pay \$225/month in rent
Households Duplicated Across Activities/Definitions	0	
Annual Total Number Of Households Transitioned To Self Sufficiency	50	

### 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	25,193	Open	Yes
Federal MTW Housing Choice Voucher Program	Community Wide	18,642	Closed	No
Federal MTW Public Housing Units	Site-Based*	1,287	Closed	Yes
	*This includes Carver – Villas & Landings			

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

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

# **SECTION III: PROPOSED ACTIVITIES**

### **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**

## 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 FY2012. 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.

Information on the activity's impact and comparison of outcomes to baselines and benchmarks: To better reflect the impact of this activity against the residents and participants that are directly involved, the OHA requested to change the baseline and benchmark of the self-sufficiency metrics. HUD approved this request. The OHA will now be reporting on all those to whom this activity applies, including public housing residents and HCV participants as of May 2017. Consequently, benchmarks have been readjusted to better indicate progress. As the OHA makes this modification, self-sufficiency metrics, for this fiscal year, will produce inconclusive results. The FY2018 MTW Annual Report will bring more well-defined findings.

For SS #1 & SS #3, tracking earned income in FY17, public housing residents earned a total income of \$9,490,841, making the average earned income of \$18,182 per household. 460 public housing residents were employed, and 62 public housing residents were unemployed, which excluded disabled and elderly residents. HCV participants earned a total income of \$13,214,639, making the average earned income of \$12,270 per household. 730 HCV participants were employed, and 347 HCV participants were unemployed, which excluded disabled and elderly participants. These numbers constitute the new baselines and benchmarks have changed accordingly.

For SS #4, tracking TANF recipients in FY17, 48 public housing residents received TANF, and 42 HCV participants received TANF. These numbers constitute the new baselines and benchmarks have changed accordingly.

For SS #5, tracking client referrals, 67 residents received self sufficiency services. The FY17 outcome exceeds the benchmark of 1 or 1% increase from the baseline of 0 public housing residents.

For SS #6, tracking operating subsidy & HAP, the average public housing resident subsidy was \$226 and \$7,631 for HCV participants. These numbers constitute the new baselines and benchmarks have changed accordingly.

For SS #7, tracking the tenant rent share, the total rent roll for public housing residents was \$2,549,832 which is an average tenant rent share of \$407 per household. For HCV participants, the total rent roll was \$3,752,880, which is an average tenant rent share of \$290 per household. These numbers constitute the new baselines and benchmarks have changed accordingly.

For SS #8, tracking client progress, 50 residents received self sufficiency. The OHA defines "self sufficiency" as being able to pay the \$225 rent floor. The FY17 outcome exceeds the benchmark of 1 or 1% increase from the baseline of 0 public housing residents.

Indicate whether the activity is on schedule: This activity is on schedule according to the FY17 plan.



**Hardship Requests:** The MTW Resource Center provides self sufficiency services for residents that are unable to pay the \$225 rent floor, 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 referral. Use of a computer lab, transportation (bus passes), and child care assistance is provided to help participants secure and maintain employment. The 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. At this time, HCV participants are not referred to the MTW Resource Center; therefore, the OHA is not tracking whether participants are enrolled in these programs. While HCV participants await referral to the MTW Resource Center, each participant’s rent is reduced. The new rent is the total tenant payment (TTP) minus utilities or \$100, whichever is greater. Also, Sanford Housing Authority vouchers holders are not in the OHA MTW block grant; therefore, self sufficiency services are not offered to SHA HCV participants.

During FY2017, the OHA referred eighteen (18) residents from its public housing sites to the MTW Resource Center. A total of sixty-seven (67) participants received services throughout the fiscal year. Fifty (50) 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.

Public housing had a total of 16 hardship requests. 11 of those hardships were approved, and 5 were denied. HCV had a total zero \$225 rent floor hardship requests.

**Benchmarks Achieved:** See metrics.

**Benchmarks Revised:** Yes, the OHA changed the baselines for SS #1, SS #3, SS #4, SS #6, and SS #7 in order to more accurately track the progress of this activity. Consequently, the benchmarks have changed. Explanations have been provided in the preceding paragraphs.

**Change in Data Collection methodology:** No.

<b>Self Sufficiency</b>				
<b>SS # 1: Increase in Household Income</b>				
<i>Unit of Measurement</i>	<i>Baseline</i>	<i>Benchmark</i>	<i>Outcome</i>	<i>Benchmark Achieved?</i>
Average earned income of households affected by this policy in dollars (increase).	<b>Public Housing</b> \$18,182*	<b>Public Housing</b> \$18,545 or 2% increase	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A
	<b>HCV</b> \$12,270**	<b>HCV</b> \$12,515 or 2% increase	<b>HCV</b> N/A	<b>HCV</b> N/A
*This is average earned income of all affected public housing residents as of May 2017.				
**This is the average earned income of all affected HCV participants as of May 2017.				

<b>Self Sufficiency</b>				
<b>SS # 3: Increase in Positive Outcomes in Employment Status</b>				
<i>Unit of Measurement</i> (Head of Household – HOH)	<i>Baseline</i>	<i>Benchmark</i>	<i>Outcome</i>	<i>Benchmark Achieved?</i>
<b>Public Housing</b>	<b>Public Housing</b>	<b>Public Housing</b>	<b>Public Housing</b>	<b>Public Housing</b>
(1) Employed Full-Time	(1) Employed* - 460	(1) Increase by 9 HOH or 2%	N/A	N/A
(2) Employed Part-Time	(2) Employed* - 0	(2) N/A	N/A	N/A
(3) Enrolled in an Educational Program	(3) Enrolled in an Educational Program - 1	(3) Increase by 1 HOH or 100%	N/A	N/A
(4) Enrolled in Job Training Program	(4) Enrolled in Job Training Program – 0	(4) Increase by 1 HOH or 100%	N/A	N/A
(5) Unemployed	(5) Unemployed - 62	(5) Decrease by 1 HOH or 2%	N/A	N/A
(6) Other	(6) Other			

	<p><i>*OHA only tracks whether residents are employed, not whether they are employed full-time or part-time.</i></p> <p><u>Note:</u> <i>The resident enrolled in the educational program is also employed.</i></p> <p><u>Note:</u> <i>The baseline numbers reflect resident outcomes as of May 2017. The benchmark is now reflective of the new baseline.</i></p>			
<p><b>HCV</b></p> <p>(1) Employed Full-Time (2) Employed Part-Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other</p>	<p><b>HCV</b></p> <p>(1) Employed* - 730 (2) Employed * - 0 (3) Enrolled in an Educational Program** - 0 (4) Enrolled in Job Training Program** - 0 (5) Unemployed - 347 (6) Other</p>	<p><b>HCV</b></p> <p>(1) Increase to 15 HOH or 2% (2) N/A (3) Increase to 1 HOH or 100% (4) Increase to 1 HOH or 100% (5) Decrease to 7 HOH or 2%</p>	<p><b>HCV</b></p> <p>N/A N/A N/A N/A N/A</p>	<p><b>HCV</b></p> <p>N/A N/A N/A N/A N/A</p>
	<p><i>* OHA only tracks whether participants are employed, not whether they are employed full-time or part-time.</i></p> <p><i>**At this time, HCV participants are not registered in MTW Resource Center; therefore, OHA is not tracking whether participants are enrolled in these programs.</i></p> <p><u>Note:</u> <i>The baseline numbers reflect participant outcomes as of May 2017. The benchmark is now reflective of the new baseline.</i></p>			
<p><b>Public Housing</b></p> <p>(1) Employed Full-Time (2) Employed Part-Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other</p>	<p><b>Public Housing</b></p> <p>(1) Employed* - 88% (2) Employed* - 0% (3) Enrolled in an Educational Program - 0% (4) Enrolled in Job Training Program - 0% (5) Unemployed - 12% (6) Other</p>	<p><b>Public Housing</b></p> <p>(1) 89% or 1% of HOHs (2) N/A (3) 1% or 1% of HOHs (4) 1% or 1% of HOHs (5) 11% or 1% of HOHs</p>	<p><b>Public Housing</b></p> <p>N/A N/A N/A N/A N/A</p>	<p><b>Public Housing</b></p> <p>N/A N/A N/A N/A N/A</p>
	<p><i>* OHA only tracks whether residents are employed, not whether they are employed full-time or part-time.</i></p> <p><u>Note:</u> <i>The baseline percentages reflect resident outcomes as of May 2017. The benchmark is now reflective of the new baseline.</i></p>			
<p><b>HCV</b></p> <p>(1) Employed Full-Time (2) Employed Part-Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other</p>	<p><b>HCV</b></p> <p>(1) Employed* - 68% (2) Employed* - 0% (3) Enrolled in an Educational Program** - 0% (4) Enrolled in Job Training Program** - 0% (5) Unemployed - 32% (6) Other</p>	<p><b>HCV</b></p> <p>(1) 69% or 1% of HOHs (2) N/A (3) 1% or 1% of HOHs (4) 1% or 1% of HOHs (5) 31% or 1% of HOHs</p>	<p><b>HCV</b></p> <p>N/A N/A N/A N/A N/A</p>	<p><b>HCV</b></p> <p>N/A N/A N/A N/A N/A</p>
	<p><i>* OHA only tracks whether participants are employed, not whether they are employed full-time or part-time.</i></p> <p><i>**At this time, HCV participants are not registered in MTW Resource Center; therefore, OHA is not tracking whether participants are enrolled in these programs.</i></p> <p><u>Note:</u> <i>The baseline percentages reflect participant outcomes as of May 2017. The benchmark is now reflective of the new baseline.</i></p>			

## Self Sufficiency

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

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving TANF assistance (decrease)	<b>Public Housing</b> 48*	<b>Public Housing</b> 1 or 2% decrease	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A
	<b>HCV</b> 42**	<b>HCV</b> 1 or 2% decrease	<b>HCV</b> N/A	<b>HCV</b> N/A
<p>*This is the number of affected public housing residents receiving TANF as of May 2017.</p> <p>**This is the number of affected HCV participants receiving TANF as of May 2017.</p>				

## Self Sufficiency

### 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)*	<b>Public Housing</b> 0*	<b>Public Housing</b> Increase by 1 or 1%**	<b>Public Housing</b> 67	<b>Public Housing</b> Yes
	<b>HCV</b> 0***	<b>HCV</b> N/A	<b>HCV</b> N/A	<b>HCV</b> N/A
<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>**OHA reverted back to its original benchmark created in FY14.</p> <p>***There is no HCV data because the HCV program has not yet been added to this activity.</p> <p><u>Note:</u> Services aimed to increase self sufficiency are defined as the services associated with Activity 1, and households receiving services are those that have received a referral and have had an assessment.</p> <p><u>Note:</u> Some households remain active in the resource center although they are paying \$225 because they continue to receive other services.</p>				

## Self Sufficiency

### SS # 6: Reducing Per Unit Subsidy Costs for Participating Households

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average amount of Section 8 and/or 9 subsidy per households affected by this policy in dollars (decrease)	<b>Public Housing</b> \$226*	<b>Public Housing</b> \$224 or 1% decrease	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A
	<b>HCV</b> \$7,631**	<b>HCV</b> \$7,555 or 1% decrease	<b>HCV</b> N/A	<b>HCV</b> N/A
<p>*This is the average subsidy of all affected public housing residents as of May 2017.</p> <p>**This is the average HAP of all affected HCV participants as of May 2017.</p>				

## Self Sufficiency

### SS # 7: Increase in Tenant Rent Share

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Tenant rent share in dollars (increase)	<b>Public Housing</b> \$2,549,832 total rent roll or \$407 per unit month*	<b>Public Housing</b> \$2,574,504 total rent roll or \$411 per unit month	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A
	<b>HCV</b> \$3,752,880 total rent roll or \$290 per unit month**	<b>HCV</b> \$3,790,409 total rent roll or \$293 per unit month	<b>HCV</b> N/A	<b>HCV</b> N/A
<p>*This is the average tenant rent of all affected public housing residents as May 2017.</p> <p>**This is the average tenant rent of all affected HCV participants as May 2017.</p>				

## Self Sufficiency

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

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self sufficiency (increase)	<b>Public Housing</b> 0	<b>Public Housing</b> 1 or 1% increase	<b>Public Housing</b> 50	<b>Public Housing</b> Yes
	<b>HCV</b> N/A*	<b>HCV</b> N/A*	<b>HCV</b> N/A	<b>HCV</b> N/A
<p>*There is no HCV data because the HCV program has not yet been added to this activity.</p> <p><u>Note:</u> OHA realizes that the requirements for the baseline are not conducive to accurately reflecting the progress of this particular metric - transition to self sufficiency.</p> <p><u>Note:</u> The OHA definition for "self sufficiency" is to be paying \$225 in monthly rent</p>				

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

**Approval & Implementation Year:** This activity was first approved in FY2012. Activity 2, in its current form, was approved in FY2015 (November 2014). The phased-in implementation began in FY2015.

**Description:** Activity 2 streamlines the recertification process in the public housing and housing choice voucher programs by conducting recertification of all public housing residents and HCV participants every three years (triennial). This means that every three years, residents and participants 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. All aspects of this activity also apply to NED, FUP, VASH, and SHA vouchers.

The OHA recertified one third of all residents and participants in FY2015 and one-third in FY2016. The OHA recertified the remaining one third of its residents and participants in FY2017. Thereafter, the OHA will continue 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 complete an annual online update. The OHA uses this as an opportunity to conduct an audit, reviewing the household composition, tax return, and performing criminal background checks. During the annual online update, the OHA recalculates 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*

The OHA continues 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.

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:**

To better reflect the impact of this activity against the residents and participants that are directly involved, the OHA requested to change the baseline and benchmark of the self-sufficiency metric. HUD approved this request. The OHA will now be reporting on all those to whom this activity applies, including public housing residents and HCV participants as of May 2017.

For CE #1, tracking staff time savings, the total cost for public housing staff to complete recertifications was \$14,188. The FY17 outcome for public housing is below the benchmark of \$170,040 from the baseline of \$340,080. The total cost for HCV staff to complete recertifications was \$100,173. The FY17 outcome for HCV is below the benchmark of \$100,365 from the baseline of \$200,731.

For CE #2, tracking employee productivity, the total time for staff to complete recertifications was 588 hours. The FY17 outcome for public housing is below the benchmark of 6,240 hours from the baseline of 12,480 hours. The total time for HCV staff to complete recertifications was 5,824 hours. The FY17 outcome for HCV exceeds the benchmark of 4,732 hours from the baseline of 9,464 hours. While the OHA did not achieve the HCV benchmark, the outcome is much lower than the baseline. Additionally, some time was not saved due to the continual review of the OHA's entire population annually either by way of the triennial recertification or the annual update.

For CE #3, tracking employee productivity, the average error rate in completing a task is 0%. The FY17 outcome meets the benchmark of 0% from the baseline of 0 errors.

For CE #5, tracking the tenant rent share, the total rent roll for public housing residents was \$2,549,832 which is an average tenant rent share of \$407 per household. For HCV participants, the total rent roll was \$7,366,272, which is an average tenant rent share of \$249 per household. These numbers constitute the new baselines and benchmarks have changed accordingly.

For SS #1 & SS #3, tracking earned income in FY17, public housing residents earned a total income of \$10,798,990, making the average earned income of \$8,765 per household. 553 public housing residents were employed, and 679 public housing residents were unemployed, which included disabled and elderly residents. HCV participants earned a total income of \$13,214,639, making the average earned income of \$6,015 per household. 865 HCV participants were employed, and 1,597 HCV participant were unemployed, which included disabled and elderly participants. These numbers constitute the new baselines and benchmarks have changed accordingly.

For SS #4, tracking TANF recipients in FY17, 48 public housing residents received TANF, and 67 HCV participants received TANF. The FY17 outcomes exceed the benchmarks of 1 or 1% decrease from the baselines of 76 public housing residents and 178 HCV participants.

For SS #5, tracking client referrals, 67 residents received self sufficiency services. The FY17 outcome exceeds the benchmark of 1 or 1% increase from the baseline of 0 public housing residents.

For SS #8, tracking client progress, 50 residents received self sufficiency. The OHA defines "self sufficiency" as being able to pay the \$225 rent floor. The FY17 outcome exceeds the benchmark of 1 or 1% increase from the baseline of 0 public housing residents.

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

Benchmark Achieved: See metrics

Benchmarks Revised: Yes, the OHA changed the baselines for SS #1, SS #3, and CE #5 in order to more accurately track the progress of this activity. Consequently, the benchmarks have changed. Explanations have been provided in the preceding paragraphs.

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)	<b>Public Housing</b> \$340,080*	<b>Public Housing</b> \$170,040	<b>Public Housing</b> \$14,188**	<b>Public Housing</b> Yes
	<b>HCV</b> \$200,731***	<b>HCV</b> \$100,365	<b>HCV</b> \$100,173****	<b>HCV</b> Yes
<p>*Calculation: 12,480 hours/year X \$27.25 (average hourly wage) = \$340,080</p> <p>**Calculation: 588 hours/year X \$24.13 (average hourly wage) = \$14,188</p> <p>***Calculation: 9,464 hours/year X \$21.21 (average hourly wage) = \$200,731</p> <p>****Calculation: 5,824 hours/year X \$17.20 (average hourly wage) = \$100,173</p> <p><u>Note:</u> These calculations are based upon an estimated time savings and resulting cost savings for recertifications. These calculations include estimated benefits but do not include overhead costs.</p>				

## Cost Effectiveness

### CE # 2: Staff Time Savings

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	<b>Public Housing</b> 12,480 hours*	<b>Public Housing</b> 6,240 hours	<b>Public Housing</b> 588 hours**	<b>Public Housing</b> Yes
	<b>HCV</b> 9,464 hours***	<b>HCV</b> 4,732 hours	<b>HCV</b> 5,824 hours****	<b>HCV</b> No
<p>*Calculation: 8 hours/day X 52 weeks/year = 2080 hours   2080 hours/year X 75% = 1560 hours X 8 employees = 12,480 hours</p> <p>**Calculation: 8 hours/day X 52 weeks/year = 2080 hours   2080 hours/year X 3.53% = 73.5 hours X 8 employees = 588 hours</p> <p>***Calculation: 8 hours/day X 52 weeks/year = 2080 hours   2080 hours/year X 65% = 1352 hours X 7 employees = 9,464 hours</p> <p>****Calculation: 8 hours/day X 52 weeks/year = 2080 hours   2080 hours/year X 40% = 832 hours X 7 employees = 5,824 hours</p> <p><u>Note:</u> These calculations are based upon an estimated time savings for recertifications.</p>				

## Cost Effectiveness

### 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

## Cost Effectiveness

### CE # 5: Increase in Tenant Rent Share

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Tenant rent share in dollars (increase).	<b>Public Housing</b> \$2,549,832 total rent roll or \$172 per unit month*	<b>Public Housing</b> \$2,568,919 total rent roll or \$174 per unit month	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A
	<b>HCV</b> \$7,366,272 total rent roll or \$249 per unit month**	<b>HCV</b> \$7,436,252 total rent roll or \$252 per unit month	<b>HCV</b> N/A	<b>HCV</b> N/A
*This is the average tenant rent of all public housing residents as May 2017.				
**This is the average tenant rent of all HCV participants as May 2017.				

## 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)	<b>Public Housing</b> \$8,765*	<b>Public Housing</b> \$8,853 or 1% increase	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A
	<b>HCV</b> \$6,015**	<b>HCV</b> \$6,075 or 1% increase	<b>HCV</b> N/A	<b>HCV</b> N/A
*This is average earned income of all public housing residents as of May 2017.				
**This is the average earned income of all HCV participants as of May 2017.				

## Self Sufficiency

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

Unit of Measurement (Head of Household – HOH)	Baseline	Benchmark	Outcome	Benchmark Achieved?
<b>Public Housing</b>	<b>Public Housing</b>	<b>Public Housing</b>	<b>Public Housing</b>	<b>Public Housing</b>
(1) Employed Full-Time	(1) Employed* - 553	(1) Increase by 6 HOH or 1%	N/A	N/A
(2) Employed Part-Time	(2) Employed* - 0	(2) N/A	N/A	N/A
(3) Enrolled in an Educational Program	(3) Enrolled in an Educational Program- 1	(3) Increase by 1 HOH or 100%	N/A	N/A
(4) Enrolled in Job Training Program	(4) Enrolled in Job Training Program – 0	(4) Increase by 1 HOH or 100%	N/A	N/A
(5) Unemployed	(5) Unemployed - 679	(5) Decrease by 7 HOH or 1%	N/A	N/A
(6) Other	(6) Other			
*OHA only tracks whether residents are employed, not whether they are employed full-time or part-time.				
<u>Note:</u> The resident enrolled in the educational program is also employed.				
<u>Note:</u> The baseline numbers reflect resident outcomes as of May 2017. The benchmark is now reflective of the new baseline.				
<b>HCV</b>	<b>HCV</b>	<b>HCV</b>	<b>HCV</b>	<b>HCV</b>
(1) Employed Full-Time	(1) Employed* - 865	(1) Increase by 9 HOH or 1%	N/A	N/A
(2) Employed Part-Time	(2) Employed* - 0	(2) N/A	N/A	N/A
(3) Enrolled in an Educational Program	(3) Enrolled in an Educational Program** - 0	(3) Increase by 1 HOH or 100%	N/A	N/A
(4) Enrolled in Job Training Program	(4) Enrolled in Job Training Program** - 0	(4) Increase by 1 HOH or 100%	N/A	N/A
(5) Unemployed	(5) Unemployed - 1597	(5) Decrease by 16 HOH or 1%	N/A	N/A
(6) Other	(6) Other			
*OHA only tracks whether participants are employed, not whether they are employed full-time or part-time.				



	<p><b>**At this time, HCV participants are not registered in MTW Resource Center; therefore, OHA is not tracking whether participants are enrolled in these programs.</b></p> <p><b>Note:</b> The baseline numbers reflect participant outcomes as of May 2017. The benchmark is now reflective of the new baseline.</p>			
<p><b>Public Housing</b></p> <p>(1) Employed Full-Time (2) Employed Part-Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other</p>	<p><b>Public Housing</b></p> <p>(1) Employed* – 45% (2) Employed* – 0% (3) Enrolled in an Educational Program – 0% (4) Enrolled in Job Training Program – 0% (5) Unemployed – 55% (6) Other</p>	<p><b>Public Housing</b></p> <p>(1) 46% or 1% of HOHs (2) N/A (3) 1% or 1% of HOHs (4) 1% or 1% of HOHs (5) 54% or 1% of HOHs</p>	<p><b>Public Housing</b></p> <p>N/A N/A N/A N/A N/A</p>	<p><b>Public Housing</b></p> <p>N/A N/A N/A N/A N/A</p>
<p><b>*OHA only tracks whether residents are employed, not whether they are employed full-time or part-time.</b></p> <p><b>Note:</b> The baseline percentages reflect resident outcomes as of May 2017. The benchmark is now reflective of the new baseline.</p>				
<p><b>HCV</b></p> <p>(1) Employed Full-Time (2) Employed Part-Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other</p>	<p><b>HCV</b></p> <p>(1) Employed* – 35% (2) Employed* – 0% (3) Enrolled in an Educational Program** – 0% (4) Enrolled in Job Training Program** – 0% (5) Unemployed – 65% (6) Other</p>	<p><b>HCV</b></p> <p>(1) 36% or 1% of HOHs (2) N/A (3) 1% or 1% of HOHs (4) 1% or 1% of HOHs (5) 64% or 1% of HOHs</p>	<p><b>HCV</b></p> <p>N/A N/A N/A N/A N/A</p>	<p><b>HCV</b></p> <p>N/A N/A N/A N/A N/A</p>
<p><b>*OHA only tracks whether participants are employed, not whether they are employed full-time or part-time.</b></p> <p><b>**At this time, HCV participants are not registered in MTW Resource Center; therefore, OHA is not tracking whether participants are enrolled in these programs.</b></p> <p><b>Note:</b> The baseline percentages reflect participant outcomes as of May 2017. The benchmark is now reflective of the new baseline.</p>				

<b>Self Sufficiency</b>				
<b>SS # 4: Households Removed from Temporary Assistance for Needy Families (TANF)</b>				
<i>Unit of Measurement</i>	<i>Baseline</i>	<i>Benchmark</i>	<i>Outcome</i>	<i>Benchmark Achieved?</i>
Number of households receiving TANF assistance (decrease)	<b>Public Housing</b> 76*	<b>Public Housing</b> 1% or 1 household decreased**	<b>Public Housing</b> 48 or 37% decrease	<b>Public Housing</b> Yes
	<b>HCV</b> 178	<b>HCV</b> 1% or 2 households decreased	<b>HCV</b> 67 or 62% decrease	<b>HCV</b> Yes
<p><b>*This data is as of 4/7/14. Note this is after the start of FY2015 because the metric was not in OHA's initial plan submission. HUD requested this metric 3/31/14.</b></p> <p><b>**OHA changed part of the explanation for the benchmark to reflect the actual number of households that 1% represents.</b></p>				

## Self Sufficiency

### 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)*	<b>Public Housing</b> 0*	<b>Public Housing</b> Increase by 1 or 1%**	<b>Public Housing</b> 67	<b>Public Housing</b> Yes
	<b>HCV</b> 0***	<b>HCV</b> N/A	<b>HCV</b> N/A	<b>HCV</b> N/A
<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>**OHA reverted back to its original benchmark created in FY14.</p> <p>***There is no HCV data because the HCV program has not yet been added to this activity.</p> <p><u>Note:</u> Services aimed to increase self sufficiency are defined as the services associated with activity 1, and households receiving services are those that have received a referral and have had an assessment.</p> <p><u>Note:</u> Some households remain active in the resource center although they are paying \$225 because they continue to receive other services.</p>				

## Self Sufficiency

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

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self sufficiency (increase)	<b>Public Housing</b> 0	<b>Public Housing</b> 1 or 1% increase	<b>Public Housing</b> 50	<b>Public Housing</b> Yes
	<b>HCV</b> N/A*	<b>HCV</b> N/A*	<b>HCV</b> N/A	<b>HCV</b> N/A
<p>*There is no HCV data because the HCV program has not yet been added to this activity.</p> <p><u>Note:</u> OHA realizes that the requirements for the baseline are not conducive to accurately reflecting the progress of this particular metric - transition to self sufficiency.</p> <p><u>Note:</u> The OHA definition for "self sufficiency" is to be paying \$225 in monthly rent</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 FY2012. The phased in implementation began in FY2014.

Description: Activity 6 provides 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 the OHA and privately managed.

Information on the activity's impact and comparison of outcomes to baselines and benchmarks: West Oaks is privately managed; therefore, the private management firm is responsible for the initial intake of each applicant. Once the applicant has been screened, the applicant is then referred to the OHA for review and compliance. After the OHA completes its assessment, the applicant then becomes a participant. The OHA is able to synergistically utilize the private management firm to benefit the OHA, thereby reducing agency-wide costs and staff hours.

For CE #1, tracking staff time savings, the total cost for staff to complete applicant reviews was \$678. The FY17 outcome is below the benchmark of \$100,365 from the baseline of \$200,731.

For CE #2, tracking employee productivity, the total time for staff to complete applicant reviews was 45 hours. The FY17 outcome is below the benchmark of 4,732 hours from the baseline of 9,464 hours.

For HC #1, tracking new housing units, 30 new project-based transitional housing units were leased in FY17. The FY17 outcome exceeds the benchmark of 10 units or 20% increase from the baseline of 0 households. By the end of FY17, the OHA had leased 53 project-based transitional housing units cumulatively. The 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.

For HC #5 and HC #7, tracking vouchers leased, 30 households for transitional housing were served in FY17. The FY17 outcome exceeds the benchmarks of 10 households or 40% increase from the baseline of 0 households. By the end of FY17, the OHA had served 53 households cumulatively. The 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.

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 (decrease)	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A
	<b>HCV</b> \$200,731*	<b>HCV</b> \$100,365	<b>HCV</b> \$678**	<b>HCV</b> Yes
<p>*Calculation: 9,464 hours/year X \$21.21 (average hourly wage) = \$200,731</p> <p>**Calculation: 45 hours/year X \$15.07 (average hourly wage) = \$678</p> <p><i>Note:</i> These calculations are based upon an estimated time savings and resulting cost savings. Calculations include estimated benefits but do not include overhead costs.</p>				

## Cost Effectiveness

### CE # 2: Staff Time Savings

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A
	<b>HCV</b> 9,464 hours*	<b>HCV</b> 4,732 hours	<b>HCV</b> 45 hours**	<b>HCV</b> Yes
<p>*Calculation: 8 hours/day X 52 weeks/year = 2080 hours   2080 hours/year X 65% = 1352 hours X 7 employees = 9,464 hours</p> <p>**Calculation: 8 hours/day X 52 weeks/year = 2080 hours   2080 hours/year X 1.08% = 22.5 hours X 2 employees = 45 hours</p>				

## Housing Choice

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

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of new housing units made available for homeless households as a result of the activity (increase).	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A
	<b>HCV</b> 0	<b>HCV</b> 10 units or 20% increase	<b>HCV</b> 30	<b>HCV</b> Yes

## Housing Choice

### HC # 5: Increase in Resident Mobility

Unit of Measurement	Baseline	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).	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A
	<b>HCV</b> 0	<b>HCV</b> 10 households or 40% increase	<b>HCV</b> 30	<b>HCV</b> Yes

# Housing Choice

## 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>
Number of households receiving services aimed to increase housing choice (increase)	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A
	<b>HCV</b> 0	<b>HCV</b> 10 households or 40% increase	<b>HCV</b> 30	<b>HCV</b> Yes

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

Approval & Implementation Year: Activity 8 was first approved in FY2016. The phased in implementation began in FY2016.

Description: The OHA will project base up to 20% or 538 of its available tenant based HCV vouchers at OHA owned units, which are privately managed. HUD approved the OHA to use its MTW flexibilities to implement this activity without engaging in a competitive process. The OHA was also granted approval to conduct its own inspections and rent reasonableness functions.

The OHA has implemented its project-based voucher program at OHA-owned sites where there are no public housing units or other housing subsidies offered. The vouchers at West Oaks are in addition to the PBV vouchers discussed in Activity 6 (transitional housing for the homeless). Jackson Court, Division Oaks, and West Oaks are approved sites for the project-based voucher program. The policies and processes for implementing the OHA PBV program are the same as the tenant-based voucher program.

Information on the activity’s impact and comparison of outcomes to baselines and benchmarks: The private management firm is solely responsible for the initial intake and placement of each applicant/participant. At West Oaks, there were zero project-based vouchers leased up in FY17 and a total of 0 project-based vouchers leased up since the inception of this activity. Jackson Court is currently 98% occupied. West Oaks and Division Oaks are presently both 100% occupied.

Stephenson & Moore is the management company that oversees the West Oaks and Jackson Court/Division Oaks developments. Their FY17 contract total was \$90,000, which is reflected in CE #1. Although, that number is inclusive of many other tasks, it is below both the benchmark and baseline for this metric. Accordingly, for CE #2, the OHA did not have to expend any additional manpower for this activity; therefore, the savings in staff hours were equal to the extent of the management contract. Moreover, the management company does not track hours spent on any one task.

Indicate whether the activity is on schedule: Yes. The OHA may apply project-based vouchers to the units at West Oaks, Jackson Court, and Division Oaks as they become available.

Benchmarks Achieved: See Metrics.

Revised Benchmarks: No.

Changes in Data Collection methodology: No.

<b>Cost Effectiveness</b>				
<b>CE # 1: Agency Cost Savings</b>				
<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)	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A
	<b>HCV</b> \$200,731*	<b>HCV</b> \$100,365	<b>HCV</b> \$90,000**	<b>HCV</b> Yes
*Calculation: 9,464 hours/year X \$21.21 (average hourly wage) = \$200,731				
**FY17 contract totals for Jackson Court/Division Oaks (\$30,000) and West Oaks (\$60,000)				

## Cost Effectiveness

### CE # 2: Staff Time Savings

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A
	<b>HCV</b> 9,464 hours*	<b>HCV</b> 4,732 hours	<b>HCV</b> 0 Hours**	<b>HCV</b> Yes
<p>*Calculation: 8 hours/day X 52 weeks/year = 2080 hours   2080 hours/year X 65% = 1352 hours X 7 employees = 9,464 hours</p> <p>**Calculation: 8 hours/day X 52 weeks/year = 2080 hours   2080 hours/year X 0% = 0 hours X 7 employees = 0 hours</p>				

## Cost Effectiveness

### 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

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

Approval & Implementation Year: Activity 9 was first approved in FY2016. The phased in implementation began in FY 2016.

Description: In FY2016 the OHA, using the MTW flexibilities, requested approval to establish a minimum rent that exceeds \$50 for both public housing and the housing choice voucher program and to establish an agency-wide minimum rent of \$100. Agency-wide programs 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. The OHA, later, decided not to implement the \$100 minimum rent activity for its VASH voucher holders; 221 VASH vouchers were included in our original baseline.

Information on the activity's impact and comparison of outcomes to baselines and benchmarks: To better reflect the impact of this activity against the residents and participants that are directly involved, the OHA requested to change the baseline and benchmark of the self-sufficiency and cost effectiveness metrics. HUD approved this request. The OHA will now be reporting on all those to whom this activity applies, including public housing residents and HCV participants as of May 2017. Consequently, benchmarks have been readjusted to better indicate progress. Self-sufficiency metrics, for this fiscal year, will produce inconclusive results, as the OHA makes this modification. The FY2018 MTW Annual Report will bring more well-defined findings.

For CE #5, tracking the tenant rent share, the total rent roll for public housing residents was \$2,549,832 which is an average tenant rent share of \$407 per household. For HCV participants, the total rent roll was \$7,366,272, which is an average tenant rent share of \$249 per household. These numbers constitute the new baselines and benchmarks have changed accordingly.

For SS #1 & SS #3, tracking earned income in FY17, public housing residents earned a total income of \$10,798,990 making the average earned income of \$8,765 per household. 553 public housing residents were employed, and 679 public housing residents were unemployed, which included disabled and elderly residents. HCV participants earned a total income of \$13,214,639 making the average earned income of \$6,015 per household. 865 HCV participants were employed, and 1,597 HCV participants were unemployed, which included disabled and elderly participants. These numbers constitute the new baselines and benchmarks have changed accordingly.

For SS #4, tracking TANF recipients in FY17, 48 public housing residents received TANF, and 67 HCV participants received TANF. The FY17 outcomes exceed the benchmark of 1 or 1% decrease from the baseline of 76 public housing residents and 178 HCV participants.

For SS #8, tracking client progress, 50 residents received self sufficiency. The OHA defines "self sufficiency" as being able to pay the \$225 rent floor. The FY17 outcome exceeds the benchmark of 1 or 1% increase from the baseline of 0 public housing residents.

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

Hardship Requests: Public Housing had zero \$100 minimum rent hardships. HCV had a total of 55 hardship requests. 33 of those hardships were approved, and 22 were denied.

Benchmarks Achieved: See metrics.

Benchmarks Revised: Yes, the OHA changed the baselines for CE #5, SS #1, and SS #3, in order to more accurately track the progress of this activity. Consequently, the benchmarks have changed. Explanations have been provided in the preceding paragraphs.

Changes in Data Collection methodology: No.



## Cost Effectiveness

### CE # 5: Increase in Tenant Rent Share

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Tenant rent share in dollars (increase).	<b>Public Housing</b> \$2,549,832 total rent roll or \$407 per unit month*	<b>Public Housing</b> \$2,568,919 total rent roll or \$174 per unit month	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A
	<b>HCV</b> \$7,366,272 total rent roll or \$249 per unit month**	<b>HCV</b> \$7,436,252 total rent roll or \$252 per unit month	<b>HCV</b> N/A	<b>HCV</b> N/A
*This is the average tenant rent of all public housing residents as May 2017.				
**This is the average tenant rent of all HCV participants as May 2017.				

## 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).	<b>Public Housing</b> \$8,765*	<b>Public Housing</b> \$8,853 or 1% increase	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A
	<b>HCV</b> \$6,015**	<b>HCV</b> \$6,075 or 1% increase	<b>HCV</b> N/A	<b>HCV</b> N/A
*This is average earned income of all public housing residents as of May 2017.				
**This is the average earned income of all HCV participants as of May 2017.				

## Self Sufficiency

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

Unit of Measurement (Head of Household – HOH)	Baseline	Benchmark	Outcome	Benchmark Achieved?
<b>Public Housing</b> (1) Employed Full-Time (2) Employed Part-Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other	<b>Public Housing</b> (1) Employed* - 553	<b>Public Housing</b> (1) Increase by 6 HOH or 1%	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A
	(2) Employed* - 0	(2) N/A	N/A	N/A
	(3) Enrolled in an Educational Program- 1	(3) Increase by 1 HOH or 100%	N/A	N/A
	(4) Enrolled in Job Training Program – 0	(4) Increase by 1 HOH or 100%	N/A	N/A
	(5) Unemployed - 679	(5) Decrease by 7 HOH or 1%	N/A	N/A
	(6) Other			
*OHA only tracks whether residents are employed, not whether they are employed full-time or part-time. <u>Note:</u> The resident enrolled in the educational program is also employed. <u>Note:</u> The baseline numbers reflect resident outcomes as of May 2017. The benchmark is now reflective of the new baseline.				
<b>HCV</b> (1) Employed Full-Time (2) Employed Part-Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other	<b>HCV</b> (1) Employed* - 865	<b>HCV</b> (1) Increase by 9 HOH or 1%	<b>HCV</b> N/A	<b>HCV</b> N/A
	(2) Employed* - 0	(2) N/A	N/A	N/A
	(3) Enrolled in an Educational Program** - 0	(3) Increase by 1 HOH or 100%	N/A	N/A
	(4) Enrolled in Job Training Program** - 0	(4) Increase by 1 HOH or 100%	N/A	N/A
	(5) Unemployed - 1597	(5) Decrease by 16 HOH or 1%	N/A	N/A
	(6) Other			
* OHA only tracks whether participants are employed, not whether they are employed full-time or part-time.				

	<p><b>**At this time, HCV participants are not registered in MTW Resource Center; therefore, OHA is not tracking whether participants are enrolled in these programs.</b></p> <p><b>Note:</b> The baseline numbers reflect participant outcomes as of May 2017. The benchmark is now reflective of the new baseline.</p>			
<b>Public Housing</b>	<b>Public Housing</b>	<b>Public Housing</b>	<b>Public Housing</b>	<b>Public Housing</b>
(1) Employed Full-Time	(1) Employed* – 45%	(1) 46% or 1% of HOHs	N/A	N/A
(2) Employed Part-Time	(2) Employed* – 0%	(2) N/A	N/A	N/A
(3) Enrolled in an Educational Program	(3) Enrolled in an Educational Program – 0%	(3) 1% or 1% of HOHs	N/A	N/A
(4) Enrolled in Job Training Program	(4) Enrolled in Job Training Program – 0%	(4) 1% or 1% of HOHs	N/A	N/A
(5) Unemployed	(5) Unemployed – 55%	(5) 54% or 1% of HOHs	N/A	N/A
(6) Other	(6) Other			
<p>* OHA only tracks whether residents are employed, not whether they are employed full-time or part-time.</p> <p><b>Note:</b> The baseline percentages reflect resident outcomes as of May 2017. The benchmark is now reflective of the new baseline.</p>				
<b>HCV</b>	<b>HCV</b>	<b>HCV</b>	<b>HCV</b>	<b>HCV</b>
(1) Employed Full-Time	(1) Employed* – 35%	(1) 36% or 1% of HOHs	N/A	N/A
(2) Employed Part-Time	(2) Employed* – 0%	(2) N/A	N/A	N/A
(3) Enrolled in an Educational Program	(3) Enrolled in an Educational Program** – 0%	(3) 1% or 1% of HOHs	N/A	N/A
(4) Enrolled in Job Training Program	(4) Enrolled in Job Training Program** – 0%	(4) 1% or 1% of HOHs	N/A	N/A
(5) Unemployed	(5) Unemployed – 65%	(5) 64% or 1% of HOHs	N/A	N/A
(6) Other	(6) Other			
<p>* OHA only tracks whether participants are employed, not whether they are employed full-time or part-time.</p> <p><b>**At this time, HCV participants are not registered in MTW Resource Center; therefore, OHA is not tracking whether participants are enrolled in these programs.</b></p> <p><b>Note:</b> The baseline percentages reflect participant outcomes as of May 2017. The benchmark is now reflective of the new baseline.</p>				

<b>Self Sufficiency</b>				
<b>SS # 4: Households Removed from Temporary Assistance for Needy Families (TANF)</b>				
<i>Unit of Measurement</i>	<i>Baseline</i>	<i>Benchmark</i>	<i>Outcome</i>	<i>Benchmark Achieved?</i>
Number of households receiving TANF assistance (decrease)	<b>Public Housing</b> 76*	<b>Public Housing</b> 1% or 1 household decreased**	<b>Public Housing</b> 48 or 37% decrease	<b>Public Housing</b> Yes
	<b>HCV</b> 178	<b>HCV</b> 1% or 2 households decreased	<b>HCV</b> 67 or 62% decrease	<b>HCV</b> Yes
<p>*This data is as of 4/7/14. Note this is after the start of FY2015 because the metric was not in OHA's initial plan submission. HUD requested this metric 3/31/14.</p> <p>**OHA changed part of the explanation for the benchmark to reflect the actual number of households that 1% represents.</p>				

# Self Sufficiency

## 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>
Number of households transitioned to self sufficiency (increase)	<b><u>Public Housing</u></b> 0	<b><u>Public Housing</u></b> 1 or 1% increase	<b><u>Public Housing</u></b> 50	<b><u>Public Housing</u></b> Yes
	<b><u>HCV</u></b> N/A*	<b><u>HCV</u></b> N/A*	<b><u>HCV</u></b> N/A	<b><u>HCV</u></b> N/A
<p><i>*There is no HCV data because the HCV program has not yet been added to this activity.</i></p> <p><i><u>Note:</u> OHA realizes that the requirements for the baseline are not conducive to accurately reflecting the progress of this particular metric - transition to self sufficiency.</i></p> <p><i><u>Note:</u> The OHA definition for "self sufficiency" is to be paying \$225 in monthly rent</i></p>				

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

**Approval & Implementation Year:** Activity 10 was first approved in FY2016. The phased in implementation began in FY2016 with the City of Orlando and the OHA executing a memorandum of understanding.

**Description:** The OHA and the City of Orlando have partnered 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. The OHA has also partnered with other agencies that provide supportive services that increase the OHA's ability to house the chronically homeless.

In this activity, The City of Orlando refers chronically homeless persons under case management to the OHA as an applicant. Once the applicant is confirmed eligible, the OHA then provides a tenant-based voucher, and the City of Orlando provides services. These referrals bypass the HCV wait list and other eligibility criteria. Approximately 150 chronically homeless persons identified by the City of Orlando will be assisted through this activity.

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

For HC #3, tracking referrals from the City of Orlando, there were 0 participants on the wait list. The FY17 outcome meets the benchmark of 0 from the baseline of participants. Due to the referral nature of the activity, there is no wait list. In the future, participants may experience a short delay due to unavailability of vouchers.

For HC #5, tracking referrals from the City of Orlando, 2 participants in FY17 and 2 participants cumulatively were able to increase their mobility. Due to the referral nature of the activity, the benchmark has changed to better reflect practical outcomes. The FY17 outcome constitutes the new benchmark.

For CE #1, tracking employee productivity, the total cost to implement this activity was \$45. The FY17 outcome is below the benchmark of \$424 from the baseline of \$0.

For CE #2, tracking employee productivity, the total staff time was 3 hours. The previous FY16 benchmark and baseline measured dollars as opposed to time. The OHA is changing that metric from dollars to hours; therefore, the new FY17 baseline will be the time it takes to review one applicant: 90 minutes. The new benchmark has changed accordingly.

For CE #3, tracking employee productivity, the average error rate in completing a task is 0%. The FY17 outcome meets the benchmark of 0% from the baseline of 0 errors.

Due to the referral nature of the activity the impact of the data is ongoing at this time. The fiscal years ahead will yield developed results, as this activity begins to take shape.

**Indicate whether the activity is on schedule:** Not applicable as the OHA is awaiting referrals from the City of Orlando.

**Benchmarks Achieved:** See metrics.

**Benchmarks Revised:** Yes, the OHA changed HC #5 to show reasonable progress, and CE #2 to reflect time savings.

**Changes in Data Collection methodology:** No.

## Housing Choice

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

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average applicant time on wait list in months (decrease)	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A
	<b>HCV</b> 0	<b>HCV</b> 0	<b>HCV</b> 0	<b>HCV</b> Yes

## Housing Choice

### HC # 5: Increase in Resident Mobility

Unit of Measurement	Baseline	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).	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A
	<b>HCV</b> 0	<b>HCV</b> 2	<b>HCV</b> N/A	<b>HCV</b> N/A

## Cost Effectiveness

### CE # 1: Agency Cost Savings

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease)	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A
	<b>HCV</b> \$0	<b>HCV</b> \$424/month*	<b>HCV</b> \$45 **	<b>HCV</b> Yes
<p>*Calculation is based upon an estimated 4 hours to determine initial eligibility x \$21.21 in average wage/hour x 5 participants/month.</p> <p>**Calculation: 1.5 hours x 15.07 average wage/hour x 2 participants/year = \$45</p>				

## Cost Effectiveness

### CE # 2: Staff Time Savings

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A	<b>Public Housing</b> N/A
	<b>HCV</b> 90 minutes	<b>HCV</b> Decrease by 5% or 85 minutes	<b>HCV</b> N/A	<b>HCV</b> N/A

# Cost Effectiveness

## 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

### A. Not Yet Implemented

No activities.

### B. On Hold

No activities.

### C. Closed Out Activities

No activities.

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

## SECTION V: SOURCES AND USES OF FUNDS

### A. Sources and Uses of Funds

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

The OHA submitted their unaudited information in FDS through the Financial Assessment System – PHA (FASPHA) on June 15, 2017.

#### Describe the Activities that Will Use Only MTW Single Fund Flexibility

In addition to the activities described above, the OHA continues to use the MTW Single Fund Flexibility to support Uses of Funds A and B.

#### **Use of Funds A: Comprehensive One-Stop Self Sufficiency Resource Center**

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. The OHA has yet to begin phasing-in non-elderly and non-disabled HCV 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.

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. The 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.

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 the OHA's residents and participants become more self sufficient.

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 the 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.

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.

#### **Use of Funds B: The Greening of OHA**

As part of Use of Funds B, the OHA conducted the following:

##### *Energy Conservation Workshops*

In June 2013, the OHA collaborated with Orlando Utilities Commission (OUC) and Duke Energy to hold MTW Green- Energy Conservation Workshops at Ivey Lane Homes. The OHA has yet to conduct workshops during FY2017 in an effort to educate residents on energy usage and conservation, but plans on doing so in the future. The ultimate goal of this effort is to reduce residents' energy consumption and consequently decrease their energy bills. The 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.



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

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

Local Asset Management Plan	
Sources	
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**

## 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 OHA executed two (2) Voluntary Compliance Agreements (VCA) in FY2016, which continued into FY2017. The agreements cover the areas of 504/ADA and Section 3 and are for a three year period. OHA submitted quarterly reports to HUD covering its progress toward compliance, and construction is underway on eighteen (18) UFAS/Section 504 accessible units pursuant to the 504/ADA VCA.

The annual financial audit for the OHA found that all eleven public housing properties owned by the OHA did not have a current Declaration of Trust (DOT) acceptable for HUD purposes. As a result, the OHA is working with an attorney to update its Declarations of Trust for all OHA properties. Also the audit found that for two Capital Fund Program (CFP) grants, whose expenditure deadlines were August 2015 and March 2016, the OHA did not submit its Actual Modernization Cost Certificates (AMCC) to the local HUD field office within the 90 day deadline. Consequently, those two Capital Fund grant AMCCs have been submitted to HUD, and the OHA will add the 90 close out period to its existing capital expenditure.

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

The agency evaluation for FY2013 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, the OHA did not have an evaluation conducted of its FY2017 MTW program.

### Certification Statement

[Certification Statement to Follow]



ORLANDO HOUSING AUTHORITY

MOVING TO WORK (MTW)  
(APRIL 1, 2016 TO MARCH 31, 2017)

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*

Vivian Bryant, Esq.  
President/CEO

*6/14/17*

Date

# SECTION VII: APPENDIX

## 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, the OHA has designed and implemented its Local Asset Management Program. The 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. The OHA describes its cost accounting plan (cost allocation plan) as part of its local asset management program.

The OHA maintains a project-based management approach which includes both the OHA-managed properties and its 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.

The OHA has developed its program to ensure that accounting and financial reporting methods comply with 2 CFR Part 200, Subpart E regarding cost allocations, 2 CFR Part 200, Subpart F 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 2 CFR Part 200, Subpart E.
  - 3) Cost Allocation Approach  
The OHA's Amended and Restated Moving to Work Agreement identifies either a "cost allocation" or "fee-for-service" option. The OHA utilizes the cost allocation method. The 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 the OHA.

All direct and indirect costs are charged to the AMPs in accordance with 2 CFR Part 200, Subpart E. 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.

The OHA has developed this program to ensure that accounting and financial reporting methods comply with 2 CFR Part 200, Subpart E regarding cost allocations, 2 CFR Part 200, Subpart F 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. The 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 the OHA operation as well as the specific information related to the MTW Program.

### **DIFFERENCE**

The 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.

The 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.