



FY2018

MOVING TO WORK (MTW) ANNUAL REPORT

**Orlando Housing Authority
Executive Office
April 1, 2017 through March 31, 2018**

FY2018 Moving to Work (MTW) Annual Report

April 1, 2017 – March 31, 2018

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SECTION I: INTRODUCTION

SECTION I: INTRODUCTION

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 seventh 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, Activities 10 and 11 remain in the early stages of development. Activity 12 has been closed. The 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 the 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 Citrus Square RAD conversion closed on December 28, 2017. Ovation Housing LLLP owns Citrus Square, and Stephenson and Moore manage the property. As of March 2018, the occupancy rate is 98%. Citrus Square is doing rehabilitation on all 87 units as prescribed by the physical needs analysis, and 5 ADA units are undergoing significant rehabilitation. Ovation Housing is currently receiving bids on needed bathroom repairs, and Stephenson and Moore has issued a RPF for repairs in response to an insurance audit.

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

The RAD Portfolio application, for Citrus Square Apartments, 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). The OHA submitted a RAD application for Lorna Doone in March 2016 and was awarded the RAD conversion in April of 2018.

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.

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.

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

SECTION II: GENERAL HOUSING AUTHORITY OPERATING INFORMATION

A. Housing Stock Information

Actual New Project-Based Vouchers					
Property Name	Number of Vouchers Newly Project-Based		Status at End of Plan Year	RAD?	Description of Project
	Planned	Actual			
West Oaks	10	0	Ongoing. During FY18, a fire affected 20 units at West Oaks, placing them offline. PBVs for this activity have not been leased up and will not be until the rebuild is complete.	No	Activity 6: Transitional Housing The OHA is project-basing up to fifty units to provide transitional housing to homeless individuals (up to twenty-four months) at West Oaks Apartments, a three story 280 unit affordable market rate rental property. The OHA is working with the Wayne Densch Center, Inc., the Orlando Union Rescue Mission, and other service providers to provide case management as a homelessness preventative measure. A total of fifty (50) vouchers/units are to be committed for Activity 6 by the end of FY2018.
West Oaks	0	3	Despite the fire, a few available unaffected units were leased. There are still a number affected units offline.	No	Activity 8: PBVs in OHA Owned Units The OHA is project-basing up to 20% or 538 of its available tenant-based HCVs at OHA owned units. Jackson Court, Division Oaks, and West Oaks (in addition to the vouchers to be used in connection with Activity 6) are sites for the project-based voucher program.
Pendana at West Lake	20	0	Phase 1 has been completed. The OHA is waiting for referrals.	No	Lift Orlando has partnered with the OHA to redevelop Orlando's Washington Shores community, formerly The Villages of West Lakes. 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.
Citrus Square	87	87	Conversion Completed	Yes	Citrus Square Apartments is located at 5625 Hickey Avenue. It is located in a neighborhood that has significant access to goods and services, schools, medical facilities, access to jobs and a low level of crime. The property consists of 45 buildings and includes (9) 1-bedroom units; (56) 2-bedroom units; (17) 3-bedroom units and (4) 4-bedroom units. The household composition is (10) elderly/disabled; (3) elderly/non-disabled; (21) non-elderly/disabled, and (52) non-elderly/non-disabled. 87% of the households are headed by females and 13% by males. Approximately 64% of residents of Citrus Square identify as being Hispanic/Latino. RAD Conversion of Citrus Square will allow OHA to properly maintain the complex, make necessary repairs/upgrades, and improve accessibility for persons with disabilities. The RAD conversion closed in December 2017.

117

90

Planned/Actual Total Newly Project-Based Vouchers

Please describe differences between the planned and actual number of vouchers newly project-based:

Actual Existing Project-Based Vouchers					
Property Name	Number of Project-Based Vouchers		Status at End of Plan Year	RAD?	Description of Project
	Planned	Actual			
West Oaks	50*	66	Ongoing	No	Activity 6: Transitional Housing The OHA is project-basing up to fifty units to provide transitional housing to homeless individuals (up to twenty-four months) at West Oaks Apartments, a three story 280 unit affordable market rate rental property. The OHA is working with the Wayne Densch Center, Inc., the Orlando Union Rescue Mission, and other service providers to provide case management as a homelessness preventative measure.
Jackson Court/ Division Oaks/West Oaks	538***	72**	Ongoing	No	Activity 8: PBVs in OHA Owned Units The OHA is project-basing up to 20% or 538 of its available tenant-based HCVs at OHA owned units. Jackson Court, Division Oaks, and West Oaks (in addition to the vouchers to be used in connection with Activity 6) are sites for the project-based voucher program.

588

138

Planned/Actual Total Existing Project-Based Vouchers

*A total of fifty (50) vouchers/units are to be committed for Activity 6 by the end of FY2018.

**This number is a cumulative number of rotating vouchers that have been issued since the inception of the activity. Currently 11 vouchers are in use, 3, of which, were issued in FY18.

***Planned number of vouchers over a course of years and at various sites.

Activity 6: Actual PBVs issued over the fiscal years at West Oaks: FY15 (23); FY16 (13); FY17 (30)

Activity 8: Actual PBVs issued over the fiscal years at West Oaks: FY15 (0); FY16 (0); FY17 (0)

Activity 8: Actual PBVs issued over the fiscal years at Jackson Court & Division Oaks: FY15 (0); FY16 (72); FY17 (0)

Please describe differences between the planned and actual existing number of vouchers project-based: Activity 6 is an ongoing, transitional program; the goal is to help as many households as possible on a rotating basis. Therefore, there are no differences between planned and actual vouchers. For Activity 8, the OHA plans to increase the number of vouchers issued as new units and sites become available.

Actual Other Changes to MTW Housing Stock in the Plan Year

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

General Description of All Actual Capital Expenditures During the Plan Year

In FY2018, the OHA Capital Fund expenditures included \$2,005,047 for the public housing sites' Capital Fund Financing Program loan repayment to Deutsche Bank.

The OHA spent \$322,632 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 \$896,711 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.

B. Leasing Information

Actual Number of Households Served				
Number of Households Served Through:	Number of Unit Months Occupied/Leased		Number of Households Served	
	Planned	Actual	Planned	Actual
MTW Public Housing Units Leased	17496	14724	1458	1227
MTW Housing Choice Voucher (HCV) Utilized	28716	28848	2394	2404*
Local, Non-Traditional: Tenant-Based	0	0	0	0
Local, Non-Traditional: Property-Based	0	996	0	83**
Local, Non-Traditional: Homeownership	0	0	0	0

Planned/Actual Totals	46212	44568	3852	3714
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*The Citrus Square RAD units are counted within HCV.

**11 PBVs (3 new & 8 existing) at West Oaks and 72 PBVs at Jackson Court & Division Oaks.

Please describe differences between the planned and actual households served: Due to the RAD conversion of Citrus Square, a family site with 87 units, the actual number of households served is reduced on the public housing side and increased on the HCV side.

Local, Non-Traditional Category	MTW Activity Name/Number	Number of Unit Months Occupied/Leased		Number of Households to be Served	
		Planned	Actual	Planned	Actual
Tenant-Based					
Property-Based	Activity 6: Transitional Housing	120	0	10	0
Property-Based	Activity 8: PBVs in OHA Owned Units	0	996	0	83
Homeownership					

Planned/Actual Totals	120	996	10	83
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Households Receiving Local Non-Traditional Services Only	Average Number of Households Served Per Month	Total Number of Households in the Plan Year
N/A	0	0

Discussion of Any Actual/Issues/Solutions Related to Leasing	
Housing Program	Description of Actual 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.</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>
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C. Waiting List Information

Actual Waiting List Information				
Waiting List Name	Description	Number of Households on Waiting List	Waiting List Open, Partially Open or Closed	Was the Waiting List Opened During the Plan Year
MTW Public Housing	Community Wide	2,680	Closed	No
MTW Housing Choice Voucher	Community Wide	5,683	Closed	No
MTW Public Housing Units	Site-Based*	1,185	Closed	No

*This includes Carver Villas & Landings

Please describe any duplication of applicants across waiting lists:

Actual Changes to Waiting List in the Plan Year	
Waiting List Name	Description of Actual Changes to Waiting List

D. Information on Statutory Objectives and Requirements

75% of Families Assisted are Very Low-Income	
Income Level	Number of Local, Non-Traditional Households Admitted in the Plan Year
80% - 50% Area Median Income	7
49% - 30% Area Median Income	22
Below 30% Area Median Income	54

Total Local, Non-Traditional Households Admitted **83**

Maintain Comparable Mix					
Baseline Mix of Family Sizes Served (Upon Entry to MTW)					
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	6%
5 Person	27	9	N/A	36	1%
6+ Person	2	2	N/A	4	0%
TOTAL	1463	2578	N/A	4041	100%

*Sum of 0 and 1 bedroom units

Please describe any justification for any "Non-MTW Adjustments" given above:

Maintain Comparable Mix				
Mix of Families Sized Served (In Plan Year)				
Family Size	Baseline Mix Percentages	Number of Household Served in Plan Year	Percentage of Households Served in Plan Year	Percentage Change From Baseline Year to Current Plan Year
1 Person	45%	1601	44%	-2%
2 Person	20%	980	27%	35%
3 Person	28%	831	23%	-18%
4 Person	6%	184	5%	-17%
5 Person	1%	31	1%	0%
6+ Person	0%	4	0%	0%
TOTAL	100%	3631	100%	-2%

Please describe the justification for any variances of more than 5% between the Plan Year and Baseline Year: There was just a shift in the family size served from 3 bedrooms to 2 bedrooms due to changes in family composition.

Number of Households Transitioned to Self-Sufficiency by Fiscal Year End		
MTW Activity Name/Number	Number of Households Transitioned to Self-Sufficiency	MTW PHA Local Definition of Self-Sufficiency
\$225 Rent Floor for Non-Elderly & Non-Disabled Households/Activity 1	32	Able to pay \$225/month in rent
	0	(Households Duplicated Across MTW Activities)
	32	Total Households Transitioned to Self Sufficiency

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**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.”

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**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:

For SS #1 & SS #3, tracking earned income in FY18, public housing residents earned a total income of \$7,839,449, making the average earned income of \$17,858 per household. 389 public housing residents were employed, and 50 public housing residents were unemployed, which excludes disabled and elderly residents. The FY18 outcome did not meet the benchmark of \$18,545 or 2% increase due to the RAD conversion and reclassification of Citrus Square Apartments, which is a family site, from public housing to HCV. HCV participants earned a total income of \$14,060,705, making the average earned income of \$13,839 per household. 733 HCV participants were employed, and 283 HCV participants were unemployed, which excludes disabled and elderly participants. The FY18 outcome exceeds the benchmark of \$12,515 or 2% increase.

For SS #4, tracking TANF recipients in FY18, 15 public housing residents received TANF, and 26 HCV participants received TANF. The FY18 outcome exceeds the benchmark of 1 or 2% increase from the baseline of 48 public housing residents and 42 HCV participants.

For SS #5, tracking client referrals, 50 residents received self sufficiency services. The FY18 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 \$263 and \$7,733 for HCV participants. The FY18 outcomes did not meet the public housing and HCV benchmarks of \$223 and \$7,555, respectively due to overall increases in market rent.

For SS #7, tracking the tenant rent share, the total rent roll for public housing residents was \$2,145,804 which is an average tenant rent share of \$407 per household. FY18 outcome did not meet the benchmark of \$2,574,504 or 2% increase due to the RAD conversion and reclassification of Citrus Square Apartments, which is a family site, from public housing to HCV. Although, the OHA did not meet this benchmark, the OHA did maintain its baseline of \$407 per unit month. For HCV participants, the total rent roll was \$3,979,620, which is an average tenant rent share of \$326 per household. The FY18 outcome exceeds the benchmark of \$3,790,409 total rent roll or \$293 per unit month.

For SS #8, tracking client progress, 32 residents received self sufficiency. The OHA defines "self sufficiency" as being able to pay the \$225 rent floor. The FY18 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: The MTW Resource Center provides self sufficiency services for residents and participants 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. 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 FY2018, the OHA referred three (3) residents from its public housing sites to the MTW Resource Center. A total of fifty (50) participants received services throughout the fiscal year. Thirty-two (32) 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 twenty (20) active participants at the MTW resource center.

Benchmarks Achieved: See metrics.

Actual Non-Significant Changes: None.

Actual Changes to Metrics/Data Collection: The OHA changed the Public Housing benchmark for SS #6 due to a calculation error in the FY2017 Annual Report.

Actual Significant Changes: None.

Challenges in Achieving Benchmarks and Possible Strategies: None.

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).	Public Housing \$18,182	Public Housing \$18,545 or 2% increase	Public Housing 17,858	Public Housing No
	HCV \$12,270	HCV \$12,515 or 2% increase	HCV \$13,839	HCV Yes

Self Sufficiency				
SS # 3: Increase in Positive Outcomes in Employment Status				
Unit of Measurement (Head of Household – HOH)	Baseline	Benchmark	Outcome	Benchmark Achieved?
Public Housing	Public Housing	Public Housing	Public Housing	Public Housing
(1) Employed Full-Time	(1) Employed* - 460	(1) Increase by 9 HOH or 2%	389	No
(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%	1	No
(4) Enrolled in Job Training Program	(4) Enrolled in Job Training Program – 0	(4) Increase by 1 HOH or 100%	0	No
(5) Unemployed	(5) Unemployed - 62	(5) Decrease by 1 HOH or 2%	50	Yes
(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.				

HCV (1) Employed Full-Time (2) Employed Part-Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other	HCV (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	HCV (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 by 7 HOH or 2%	HCV 733 N/A 0 0 283	HCV No N/A No No Yes
<p>* OHA only tracks whether participants are employed, not whether they are employed full-time or part-time.</p> <p>**At this time, HCV participants are not registered in MTW Resource Center; therefore, OHA is not tracking whether participants are enrolled in these programs.</p>				
Public Housing (1) Employed Full-Time (2) Employed Part-Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other	Public Housing (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	Public Housing (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	Public Housing 88.61% N/A 0.23% 0% 11.39%	Public Housing Yes N/A No No Yes
<p>* OHA only tracks whether residents are employed, not whether they are employed full-time or part-time.</p>				
HCV (1) Employed Full-Time (2) Employed Part-Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other	HCV (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	HCV (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	HCV 72.15% N/A 0% 0% 27.85%	HCV Yes N/A No No Yes
<p>* OHA only tracks whether participants are employed, not whether they are employed full-time or part-time.</p> <p>**At this time, HCV participants are not registered in MTW Resource Center; therefore, OHA is not tracking whether participants are enrolled in these programs.</p> <p><u>Note:</u> The baseline percentages reflect participant outcomes as of May 2017. The benchmark is now reflective of the new baseline.</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)	Public Housing 48	Public Housing 1 or 2% decrease	Public Housing 15 or 220% decrease	Public Housing Yes
	HCV 42	HCV 1 or 2% decrease	HCV 26 or 62% decrease	HCV Yes

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)*	Public Housing 0*	Public Housing Increase by 1 or 1%	Public Housing 50	Public Housing Yes
	HCV 0**	HCV N/A	HCV N/A	HCV 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>**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)	Public Housing \$226	Public Housing \$224 or 1% decrease	Public Housing \$263	Public Housing No
	HCV \$7,631	HCV \$7,555 or 1% decrease	HCV \$7,733	HCV No

Self Sufficiency

SS # 7: Increase in Tenant Rent Share

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Tenant rent share in dollars (increase)	Public Housing \$2,549,832 total rent roll or \$407 per unit month	Public Housing \$2,574,504 total rent roll or \$411 per unit month	Public Housing \$2,145,804 total rent roll or \$407 per unit month	Public Housing No
	HCV \$3,752,880 total rent roll or \$290 per unit month	HCV \$3,790,409 total rent roll or \$293 per unit month	HCV \$3,979,620 total rent roll or \$326 per unit month	HCV Yes

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)	Public Housing 0	Public Housing 1 or 1% increase	Public Housing 32	Public Housing Yes
	HCV N/A*	HCV N/A*	HCV N/A	HCV 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 3rd 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:

For CE #1, tracking staff time savings, the total cost for public housing staff to complete recertifications was \$14,612. The FY18 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 \$96,751. The FY18 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 FY18 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 5,460 hours. The FY18 outcome for HCV did not meet the 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 and is lower than the FY17 outcome. 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 FY18 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 \$4,050,900 which is an average tenant rent share of \$298 per household. The FY18 outcome exceeds the benchmark of \$2,568,919 total rent roll or 174 per unit month. For HCV participants, the total rent roll was \$7,921,536, which is an average tenant rent share of \$275 per household. The FY18 outcome exceeds the benchmark of \$7,436,252 total rent roll or 252 per unit month.

For SS #1 & SS #3, tracking earned income in FY18, public housing residents earned a total income of \$8,842,414 making the average earned income of \$7,780 per household. 467 public housing residents were employed, and 667 public housing residents were unemployed, which includes disabled and elderly residents. The FY18 outcome did not meet the benchmark of \$8,853 or 1% increase due to the RAD conversion and reclassification of Citrus Square Apartments, which is a family site, from public housing to HCV. HCV participants earned a total income of \$16,106,465, making the average earned income of \$6,700 per household. 885 HCV participants were employed, and 1,519 HCV participants were unemployed, which includes disabled and elderly participants. The FY18 outcome exceeds the benchmark of \$6,075 or 1% increase.

For SS #4, tracking TANF recipients in FY18, 45 public housing residents received TANF, and 54 HCV participants received TANF. The FY18 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, 50 residents received self sufficiency services. The FY18 outcome exceeds the benchmark of 1 or 1% increase from the baseline of 0 public housing residents.

For SS #8, tracking client progress, 32 residents received self sufficiency. The OHA defines "self sufficiency" as being able to pay the \$225 rent floor. The FY18 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 a total of 43 hardship requests. 37 of those hardships were approved, and 6 were denied. HCV had a total of 60 hardship requests. 37 of those hardships were approved, and 23 were denied.

Benchmark Achieved: See metrics.

Actual Non-Significant Changes: None.

Actual Changes to Metrics/Data Collection: The OHA changed the Public Housing baseline for CE #5 due to a calculation error in the FY2017 Annual Report. The benchmark has, consequently, changed as well.

Actual Significant Changes: None.

Challenges in Achieving Benchmarks and Possible Strategies: None.

Cost Effectiveness

CE # 1: Agency Cost Savings

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease)	Public Housing \$340,080	Public Housing \$170,040	Public Housing \$14,612	Public Housing Yes
	HCV \$200,731	HCV \$100,365	HCV \$96,751	HCV Yes
	Calculation: 588 hours/year X \$24.85 (average hourly wage) = \$14,612 Calculation: 5,460 hours/year X \$17.72 (average hourly wage) = \$96,751 <i>Note: 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.</i>			

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).	Public Housing 12,480 hours	Public Housing 6,240 hours	Public Housing 588 hours	Public Housing Yes
	HCV 9,464 hours	HCV 4,732 hours	HCV 5,460 hours	HCV No
	Calculation: 8 hours/day X 52 weeks/year = 2080 hours 2080 hours/year X 3.53% = 73.5 hours X 8 employees = 588 hours Calculation: 8 hours/day X 52 weeks/year = 2080 hours 2080 hours/year X 37.5% = 780 hours X 7 employees = 5,460 hours <i>Note: These calculations are based upon an estimated time savings for recertifications.</i>			

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).	Public Housing \$2,549,832 total rent roll or \$172 per unit month	Public Housing \$2,568,919 total rent roll or \$174 per unit month	Public Housing 4,050,900 total rent roll or \$298 per unit month	Public Housing Yes
	HCV \$7,366,272 total rent roll or \$249 per unit month	HCV \$7,436,252 total rent roll or \$252 per unit month	HCV \$7,921,536 total rent roll or \$275 per unit month	HCV Yes

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)	Public Housing	Public Housing	Public Housing	Public Housing
	\$8,765	\$8,853 or 1% increase	\$7,780	No
	HCV	HCV	HCV	HCV
	\$6,015	\$6,075 or 1% increase	\$6,700	Yes

Self Sufficiency				
SS # 3: Increase in Positive Outcomes in Employment Status				
Unit of Measurement (Head of Household – HOH)	Baseline	Benchmark	Outcome	Benchmark Achieved?
Public Housing	Public Housing	Public Housing	Public Housing	Public Housing
(1) Employed Full-Time	(1) Employed* - 553	(1) Increase by 6 HOH or 1%	467	No
(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%	1	No
(4) Enrolled in Job Training Program	(4) Enrolled in Job Training Program – 0	(4) Increase by 1 HOH or 100%	0	No
(5) Unemployed	(5) Unemployed - 679	(5) Decrease by 7 HOH or 1%	667	Yes
(6) Other	(6) Other			
*OHA only tracks whether residents are employed, not whether they are employed full-time or part-time.				
Note: The resident enrolled in the educational program is also employed.				
HCV	HCV	HCV	HCV	HCV
(1) Employed Full-Time	(1) Employed* - 865	(1) Increase by 9 HOH or 1%	885	Yes
(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%	0	No
(4) Enrolled in Job Training Program	(4) Enrolled in Job Training Program** - 0	(4) Increase by 1 HOH or 100%	0	No
(5) Unemployed	(5) Unemployed - 1597	(5) Decrease by 16 HOH or 1%	1519	Yes
(6) Other	(6) Other			
*OHA only tracks whether participants are employed, not whether they are employed full-time or part-time.				
**At this time, HCV participants are not registered in MTW Resource Center; therefore, OHA is not tracking whether participants are enrolled in these programs.				
Public Housing	Public Housing	Public Housing	Public Housing	Public Housing
(1) Employed Full-Time	(1) Employed* – 45%	(1) 46% or 1% of HOHs	41.18%	No
(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	0%	No
(4) Enrolled in Job Training Program	(4) Enrolled in Job Training Program – 0%	(4) 1% or 1% of HOHs	0%	No
(5) Unemployed	(5) Unemployed – 55%	(5) 54% or 1% of HOHs	58.82%	No
(6) Other	(6) Other			
*OHA only tracks whether residents are employed, not whether they are employed full-time or part-time				

HCV	HCV	HCV	HCV	HCV
(1) Employed Full-Time	(1) Employed* – 35%	(1) 36% or 1% of HOHs	36.81	Yes
(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	0%	No
(4) Enrolled in Job Training Program	(4) Enrolled in Job Training Program** – 0%	(4) 1% or 1% of HOHs	0%	No
(5) Unemployed	(5) Unemployed – 65%	(5) 64% or 1% of HOHs	63.19%	Yes
(6) Other	(6) Other			
<p>*OHA only tracks whether participants are employed, not whether they are employed full-time or part-time.</p> <p>**At this time, HCV participants are not registered in MTW Resource Center; therefore, OHA is not tracking whether participants are enrolled in these programs.</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)	<u>Public Housing</u> 76 <u>HCV</u> 178	<u>Public Housing</u> 1% or 1 household decreased <u>HCV</u> 1% or 2 households decreased	<u>Public Housing</u> 45 or 69% decrease <u>HCV</u> 54 or 230% decrease	<u>Public Housing</u> Yes <u>HCV</u> Yes

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)*	<u>Public Housing</u> 0 <u>HCV</u> 0*	<u>Public Housing</u> Increase by 1 or 1% <u>HCV</u> N/A	<u>Public Housing</u> 50 <u>HCV</u> N/A	<u>Public Housing</u> Yes <u>HCV</u> 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> 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)	<u>Public Housing</u> 0 <u>HCV</u> N/A*	<u>Public Housing</u> 1 or 1% increase <u>HCV</u> N/A*	<u>Public Housing</u> 32 <u>HCV</u> N/A	<u>Public Housing</u> Yes <u>HCV</u> 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 \$0. The FY18 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 0 hours. The FY18 outcome is below the benchmark of 4,732 hours from the baseline of 9,464 hours.

For HC #1, using the cumulative total of housing units for this activity, 50 project-based transitional housing units are intended to be leased over a period of years. By the end of FY18, the OHA had leased 66 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, 0 new project-based transitional housing units were leased in FY18. The FY18 outcome did not meet the benchmark of 10 units or 20% increase from the baseline of 0 households. During FY18, a fire affected 20 units at West Oaks, placing them offline. Therefore, PBVs have not been leased up and will not be until the rebuild is complete. By the end of FY18, the OHA had helped 66 households cumulatively.

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

Benchmarks Achieved: Please see metrics.

Actual Non-Significant Changes: None.

Actual Changes to Metrics/Data Collection: None.

Actual Significant Changes: None.

Challenges in Achieving Benchmarks and Possible Strategies: None.

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)	<u>Public Housing</u> N/A <u>HCV</u> \$200,731	<u>Public Housing</u> N/A <u>HCV</u> \$100,365	<u>Public Housing</u> N/A <u>HCV</u> \$0	<u>Public Housing</u> N/A <u>HCV</u> Yes
<i>Note: These calculations are based upon an estimated time savings and resulting cost savings. Calculations include estimated benefits but do not include overhead costs.</i>				

Cost Effectiveness

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).	<u>Public Housing</u> N/A <u>HCV</u> 9,464 hours*	<u>Public Housing</u> N/A <u>HCV</u> 4,732 hours	<u>Public Housing</u> N/A <u>HCV</u> 0	<u>Public Housing</u> N/A <u>HCV</u> 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 homeless households as a result of the activity (increase).	<u>Public Housing</u> N/A <u>HCV</u> 0	<u>Public Housing</u> N/A <u>HCV</u> 10 units or 20% increase	<u>Public Housing</u> N/A <u>HCV</u> 50	<u>Public Housing</u> N/A <u>HCV</u> Yes

Housing Choice

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).	<u>Public Housing</u> N/A <u>HCV</u> 0	<u>Public Housing</u> N/A <u>HCV</u> 10 households or 40% increase	<u>Public Housing</u> N/A <u>HCV</u> 0	<u>Public Housing</u> N/A <u>HCV</u> No

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)	<u>Public Housing</u> N/A <u>HCV</u> 0	<u>Public Housing</u> N/A <u>HCV</u> 10 households or 40% increase	<u>Public Housing</u> N/A <u>HCV</u> 0	<u>Public Housing</u> N/A <u>HCV</u> No

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 three (3) new project-based vouchers leased up in FY18 and a total of 72 project-based vouchers leased up since the inception of this activity. During FY18, a fire affected 20 units at West Oaks, placing them offline. PBVs have not been leased up and will not be until the rebuild is complete. West Oaks is currently 93% occupied. The units affected by the fire make up the remaining 7% of unoccupied units at West Oaks. Jackson Court and Division Oaks are presently both 100% occupied. Agency-wide costs and staff hours are reduced due to the leveraging capability of the private management firm for the intake process; As a result, for CE #1 and CE #2, the savings in agency costs and staff hours were realized to the extent of what was paid to the management firm; no additional funds were expended.

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.

Actual Non-Significant Changes: None.

Actual Changes to Metrics/Data Collection: None.

Actual Significant Changes: None.

Challenges in Achieving Benchmarks and Possible Strategies: None.

Cost Effectiveness				
CE # 1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease)	Public Housing N/A	Public Housing N/A	Public Housing N/A	Public Housing N/A
	HCV \$200,731	HCV \$100,365	HCV \$0	HCV Yes

Cost Effectiveness				
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).	<u>Public Housing</u> N/A <u>HCV</u> 9,464 hours	<u>Public Housing</u> N/A <u>HCV</u> 4,732 hours	<u>Public Housing</u> N/A <u>HCV</u> 0 Hours	<u>Public Housing</u> N/A <u>HCV</u> Yes

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

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:

For CE #5, tracking the tenant rent share, the total rent roll for public housing residents was \$4,050,900 which is an average tenant rent share of \$298 per household. The FY18 outcome exceeds the benchmark of \$2,568,919 total rent roll or 174 per unit month. For HCV participants, the total rent roll was \$7,921,536, which is an average tenant rent share of \$275 per household. The FY18 outcome exceeds the benchmark of \$7,436,252 total rent roll or 252 per unit month.

For SS #1 & SS #3, tracking earned income in FY18, public housing residents earned a total income of \$8,842,414 making the average earned income of \$7,780 per household. 467 public housing residents were employed, and 667 public housing residents were unemployed, which includes disabled and elderly residents. The FY18 outcome did not meet the benchmark of \$8,853 or 1% increase due to the RAD conversion and reclassification of Citrus Square Apartments, which is a family site, from public housing to HCV. HCV participants earned a total income of \$16,106,465, making the average earned income of \$6,700 per household. 885 HCV participants were employed, and 1,519 HCV participants were unemployed, which includes disabled and elderly participants. The FY18 outcome exceeds the benchmark of \$6,075 or 1% increase.

For SS #4, tracking TANF recipients in FY18, 45 public housing residents received TANF, and 54 HCV participants received TANF. The FY18 outcomes exceed the benchmarks of 1 or 1% decrease from the baselines of 76 public housing residents and 178 HCV participants.

For SS #8, tracking client progress, 32 residents received self sufficiency. The OHA defines "self sufficiency" as being able to pay the \$225 rent floor. The FY18 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.

Benchmarks Achieved: See metrics.

Actual Non-Significant Changes: None.

Actual Changes to Metrics/Data Collection: The OHA changed the Public Housing baseline for CE #5 due to a calculation error in the FY2017 Annual Report. The benchmark has, consequently, changed as well.

Actual Significant Changes: None.

Challenges in Achieving Benchmarks and Possible Strategies: None.

Cost Effectiveness

CE # 5: 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).	Public Housing \$2,549,832 total rent roll or \$172 per unit month HCV \$7,366,272 total rent roll or \$249 per unit month	Public Housing \$2,568,919 total rent roll or \$174 per unit month HCV \$7,436,252 total rent roll or \$252 per unit month	Public Housing 4,050,900 total rent roll or \$298 per unit month HCV \$7,921,536 total rent roll or \$275 per unit month	Public Housing Yes HCV Yes

Self Sufficiency

SS # 1: Increase in Household Income

<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).	Public Housing \$8,765 HCV \$6,015	Public Housing \$8,853 or 1% increase HCV \$6,075 or 1% increase	Public Housing \$7,780 HCV \$6,700	Public Housing No HCV Yes

Self Sufficiency

SS # 3: Increase in Positive Outcomes in Employment Status

<i>Unit of Measurement</i> (Head of Household – HOH)	<i>Baseline</i>	<i>Benchmark</i>	<i>Outcome</i>	<i>Benchmark Achieved?</i>
Public Housing (1) Employed Full-Time (2) Employed Part-Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other	Public Housing (1) Employed* - 553 (2) Employed* - 0 (3) Enrolled in an Educational Program- 1 (4) Enrolled in Job Training Program – 0 (5) Unemployed - 679 (6) Other	Public Housing (1) Increase by 6 HOH or 1% (2) N/A (3) Increase by 1 HOH or 100% (4) Increase by 1 HOH or 100% (5) Decrease by 7 HOH or 1%	Public Housing 467 N/A 1 0 667	Public Housing No N/A No No Yes
*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.				
HCV (1) Employed Full-Time (2) Employed Part-Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other	HCV (1) Employed* - 865 (2) Employed *- 0 (3) Enrolled in an Educational Program** – 0 (4) Enrolled in Job Training Program** – 0 (5) Unemployed - 1597 (6) Other	HCV (1) Increase by 9 HOH or 1% (2) N/A (3) Increase by 1 HOH or 100% (4) Increase by 1 HOH or 100% (5) Decrease by 16 HOH or 1%	HCV 885 N/A 0 0 1519	HCV Yes N/A No No Yes
* OHA only tracks whether participants are employed, not whether they are employed full-time or part-time. **At this time, HCV participants are not registered in MTW Resource Center; therefore, OHA is not tracking whether participants are enrolled in these programs.				

Public Housing (1) Employed Full-Time (2) Employed Part-Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other	Public Housing (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	Public Housing (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	Public Housing 41.18% N/A 0% 0% 58.82%	Public Housing No N/A No No No
<p>* OHA only tracks whether residents are employed, not whether they are employed full-time or part-time.</p> <p><u>Note:</u> The baseline percentages reflect resident outcomes as of May 2017. The benchmark is now reflective of the new baseline.</p>				
HCV (1) Employed Full-Time (2) Employed Part-Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other	HCV (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	HCV (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	HCV 36.81 N/A 0% 0% 63.19%	HCV Yes N/A No No Yes
<p>* OHA only tracks whether participants are employed, not whether they are employed full-time or part-time.</p> <p>**At this time, HCV participants are not registered in MTW Resource Center; therefore, OHA is not tracking whether participants are enrolled in these programs.</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)	Public Housing 76*	Public Housing 1% or 1 household decreased	Public Housing 45 or 69% decrease	Public Housing Yes
	HCV 178	HCV 1% or 2 households decreased	HCV 54 or 230% decrease	HCV Yes
	*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.			

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)	Public Housing 0	Public Housing 1 or 1% increase	Public Housing 32	Public Housing Yes
	HCV N/A*	HCV N/A*	HCV N/A	HCV 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 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 FY18 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, 12 participants were able to move to a better unit and/or neighborhood of opportunity in FY18 and 14 participants cumulatively over the life this activity. The FY18 outcome exceeds the benchmark of 2 from the baseline of 0 participants.

For CE #1, tracking employee productivity, the total cost to implement this activity was \$279. The FY18 outcome is below the benchmark of \$424 from the baseline of \$0.

For CE #2, tracking employee productivity, the total staff time was 18 hours or 90 minutes per applicant. The FY18 outcome did not meet the benchmark of 85 minutes per application; however, the OHA was able to maintain the same productivity level from FY17.

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.

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

Benchmarks Achieved: See metrics.

Actual Non-Significant Changes: None.

Actual Changes to Metrics/Data Collection: None.

Actual Significant Changes: None.

Challenges in Achieving Benchmarks and Possible Strategies: None.

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)	<u>Public Housing</u> N/A <u>HCV</u> 0	<u>Public Housing</u> N/A <u>HCV</u> 0	<u>Public Housing</u> N/A <u>HCV</u> 0	<u>Public Housing</u> N/A <u>HCV</u> Yes

Housing Choice

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).	<u>Public Housing</u> N/A <u>HCV</u> 0	<u>Public Housing</u> N/A <u>HCV</u> 2	<u>Public Housing</u> N/A <u>HCV</u> 12	<u>Public Housing</u> N/A <u>HCV</u> Yes

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)	<u>Public Housing</u> N/A <u>HCV</u> \$0	<u>Public Housing</u> N/A <u>HCV</u> \$424/month	<u>Public Housing</u> N/A <u>HCV</u> \$279/year or \$23/month	<u>Public Housing</u> N/A <u>HCV</u> Yes
Calculation: 1.5 hours x 15.52 average wage/hour x 12 participants/year = \$279				

Cost Effectiveness

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).	<u>Public Housing</u> N/A <u>HCV</u> 90 minutes	<u>Public Housing</u> N/A <u>HCV</u> Decrease by 5% or 85 minutes	<u>Public Housing</u> N/A <u>HCV</u> 90 minutes	<u>Public Housing</u> N/A <u>HCV</u> No

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

Activity 11: Project-Based Homeownership Program

Approval & Implementation Year: Activity 11 was first approved in FY2018. The phased-in implementation has yet to begin as planning is still underway.

Description: The Orlando Housing Authority is implementing a Section 8 Project-Based Homeownership Program, over a ten year period, beginning with the 82 homeownership units that have not been developed at Carver Park.

The OHA has partnered with the City of Orlando and other stakeholders to construct 82 homes at Carver Park. The site will be mixed-income: a number of homes sold will be affordable and a number of homes will be sold at market rate. OHA will provide monthly homeownership assistance to some or all of the affordable buyers and also provide the value of the improved land and impact fee credits, if available from the City of Orlando.

Actions Taken Towards Implementation: A market study has been completed. The OHA is using the results of the study to develop the Carver homeownership strategy including but not limited to, the process, program administration, waitlist management, unit pricing, timeline, and the amount of OHA dollars to be dedicated to this activity. Concrete plans have not been solidified, as the OHA is still in discussion with the City of Orlando.

B. On Hold

No activities.

C. Closed Out Activities

Activity 12: Tenant-Based Rental Assistant Program

Approval & Implementation Year: Activity 12 was first approved and implemented in FY2018.

Close Out Discussion: This activity was a program in which the OHA would provide funds for the first month's rent for homeless households and then receive a reimbursement from the City of Orlando. The OHA conducted a cost benefit analysis of this activity and concluded that the administrative burden of continuing this activity far outweighed the benefit to the community. The financial and human resources allocated to this activity could be better utilized elsewhere.

FY2018

**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, 2018.

Actual Use of 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, B, and C.

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 20 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.

Use of Funds C: Citrus Square Apartments

Citrus Square Apartments, built in 1982, is an 87 unit, multi-family property comprising 45 buildings situated on 10 acres in east Orlando. Citrus Square has central air and heating, polypropylene siding, ceramic tile throughout and washer/dryer hook ups. The property has a basketball court, playground; city recreation and computer learning center, individual parking, an on-site manager's office and a playground. Citrus is located on a major retail/commercial corridor, minutes from the Orlando International Airport and 15 minutes from downtown Orlando. There is direct access to public transportation and wide range of shopping and service opportunities nearby.

The Orlando Housing Authority (OHA) submitted a RAD application in December 2013 to convert units at Citrus Square to Project Based Vouchers (PBV) under the RAD program. HUD issued a RAD CHAP (Commitment to Enter into a Housing Assistance Payment) on March 27, 2015.

RAD Conversion of Citrus Square will allow OHA to properly maintain the complex, make necessary repairs/upgrades and improve accessibility for persons with disabilities. As part of the RAD process, OHA conducted a RAD Physical Conditions Assessment (RPCA) that identified capital improvement needs over the span of 20 years. In addition to improvements recommended in the RPCA, OHA will modify five (5) units to achieve full accessibility for persons with mobility impairments. Modifications will be made to layouts of kitchens, bathrooms, corridors, hallways, and door widths, and other upgrades. OHA will also complete accessibility modifications to the community building/management office. OHA will pursue 4% tax credits and bond financing to complete the improvements.

The OHA projects expending MTW block grant funds to supplement RAD project-based voucher rents at its Citrus development in the first full year and possible escalations in future years. The Citrus Square RAD conversion closed on December 28, 2017.

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
If the MTW PHA has provided a LAMP in the appendix, please provide a brief update on implementation of the LAMP. Please provide any actual changes (which must be detailed in an approved Annual MTW Plan/Plan amendment) or state that the MTW PHA did not make any changes in the Plan Year	

C. Commitment of Unspent Funds

N/A

FY2018

**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 FY2018. 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.

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

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 FY2018 MTW program.

Certification Statement

[Certification Statement to Follow]



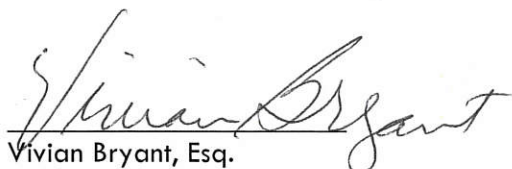
ORLANDO HOUSING AUTHORITY

MOVING TO WORK (MTW) (APRIL 1, 2017 TO MARCH 31, 2018)

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

6-29-18
Date

FY2018

**SECTION VII:
APPENDIX**

SECTION VII: APPENDIX

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.