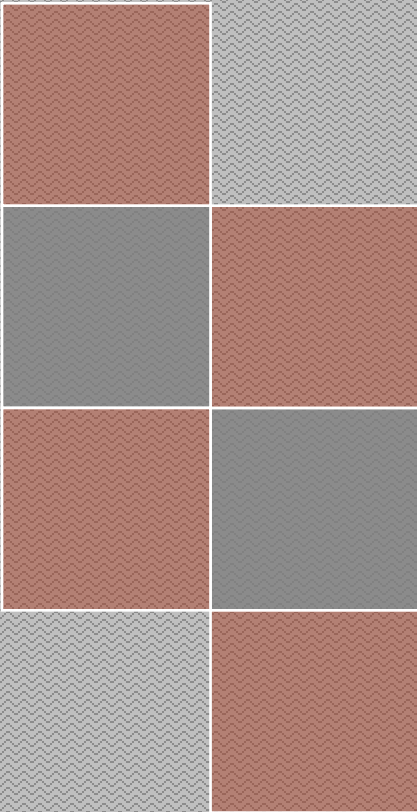


# **FY2019 MOVING TO WORK ANNUAL REPORT**



**Orlando Housing Authority  
Executive Office  
April 1, 2018 through March 31, 2019**

# FY2019 Moving to Work (MTW) Annual Report

April 1, 2018 – March 31, 2019

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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 eighth year as an MTW Agency, the OHA achieved significant success in the implementation of Activities 1, 2, 6, 8, 9, and 10. Activities 11 and 13 are in the early stages of development and have yet to be implemented. The OHA looks forward to the expansion of its MTW program.

The OHA is preparing demolition applications for Lake Mann Apartments, Griffin Park Apartments, Ivey Lane Homes, Murchison Terrace, Reeves Terrace, and Lorna Doone Apartments for submittal to the Special Applications Center (SAC). It is the intention of the OHA to demolish, redevelop, and revitalize those neighborhoods with innovative housing.

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, as they 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 OHA special purpose 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 and construction of the new housing is complete. The OHA has partnered 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.

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

**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 February 2019, the occupancy rate is 93%. The office at Citrus Square is still under construction, and one (1) ADA unit is undergoing rehabilitation.

Included in the RAD Portfolio application for Citrus Square Apartments (March 2015), the OHA received approval to submit an application to convert the units at Lorna Doone Apartments. Based on that approval, the OHA submitted a RAD application for Lorna Doone in March 2016. HUD issued a RAD CHAP (Commitment to Enter into a Housing Assistance Payment) for Lorna Doone in April of 2018.

The OHA submitted another RAD Portfolio application, which included Reeves Terrace [The Villas at Hampton Park is included in the Asset Management Project (AMP) with Reeves Terrace], Ivey Lane, Lake Mann, Griffin Park, The Villas at Carver Park, and The Landings at Carver Park to HUD in January 2018. In May of 2018, HUD issued a RAD CHAP (Commitment to Enter into a Housing Assistance Payment) for 4 of those 6 properties: Reeves Terrace, Ivey Lane, Lake Mann, and Griffin Park. The OHA has decided not to pursue RAD conversions at any of its approved properties, including Lorna Doone.

**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 was completed in FY2018. In March 2019, the OHA and SHA broke ground on the redevelopment of the former Redding Gardens to be renamed Georgetown Square. 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.

# **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                         | 0                                      | 9      | Committed and Leased       | No   | <b>Activity 6: Transitional Housing</b><br>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. *NOTE: Units, damaged by the fire in FY18, have all been repaired and are being leased. |

|   |   |  |
|---|---|--|
| 0 | 9 | <b>Planned/Actual Total Newly Project-Based Vouchers</b> |
|---|---|--|

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*                              | 0      | Committed                  | No   | <b>Activity 6: Transitional Housing</b><br>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/<br>Division Oaks/West Oaks | 538**                            | 75     | Committed and Leased       | No   | <b>Activity 8: PBVs in OHA Owned Units</b><br>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                               | 20     | Committed and Leased       | 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. |

**608      92      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.

\*\*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); FY18 (0); FY19 (9)

Activity 8: Actual PBVs issued over the fiscal years at West Oaks: FY15 (0); FY16 (0); FY17 (0); FY18 (3); FY19 (0)

Activity 8: Actual PBVs issued over the fiscal years at Jackson Court & Division Oaks: FY15 (0); FY16 (72); FY17 (0); FY18 (0); FY19 (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. New PBVs have been leased; however existing households have completed the program and are no longer participants. 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 FY2019, 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           | 17,496                                | 15,000 | 1,458                       | 1,250  |
| MTW Housing Choice Voucher (HCV) Utilized | 28,728                                | 32,100 | 2,394                       | 2,675  |
| Local, Non-Traditional: Tenant-Based      | 0                                     | 0      | 0                           | 0      |
| Local, Non-Traditional: Property-Based    | 1,104                                 | 1,008  | 92                          | 84     |
| Local, Non-Traditional: Homeownership     | 0                                     | 0      | 0                           | 0      |

|                              |               |               |              |              |
|------------------------------|---------------|---------------|--------------|--------------|
| <b>Planned/Actual Totals</b> | <b>47,328</b> | <b>48,108</b> | <b>3,944</b> | <b>4,009</b> |
|------------------------------|---------------|---------------|--------------|--------------|

**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 number of public housing households served has been permanently reduced.

| 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    | 0                                     | 108    | 0                                 | 9      |
| Property-Based                  | Activity 8: PBVs in OHA Owned Units | 1,104                                 | 900    | 92                                | 75     |
| Homeownership                   |                                     |                                       |        |                                   |        |

|                              |              |              |           |           |
|------------------------------|--------------|--------------|-----------|-----------|
| <b>Planned/Actual Totals</b> | <b>1,104</b> | <b>1,008</b> | <b>92</b> | <b>84</b> |
|------------------------------|--------------|--------------|-----------|-----------|

| 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)                                 | Funding is a potential issue for the HCV program. The OHA may not have enough administrative support to comply with HUD's leasing requirements.   |

**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 | 12,863                               | Open  | Yes  |
| MTW Housing Choice Voucher      | Community Wide | 5,810                                | Closed                                      | No   |
| MTW Public Housing Units        | Site-Based*    | 1,057                                | 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 |
| N/A   | N/A   |

**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                 | 55  |

**Total Local, Non-Traditional Households Admitted** **84**

| 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*   | 1,308*   | N/A  | 1,813*  | 45%  |
| 2 Person  | 447  | 370  | N/A  | 817   | 20%  |
| 3 Person  | 386  | 745  | N/A  | 1,131   | 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%   |
| <b>TOTAL</b>  | <b>1,463</b>   | <b>2,578</b>   | <b>N/A</b>   | <b>4,041</b>  | <b>100%</b>  |

\*Sum of 0 and 1 bedroom units

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

| <b>Maintain Comparable Mix</b>                     |                                 |  |   |  |
|--|---------------------------------|--|---|--|
| <b>Mix of Families Sized Served (In Plan Year)</b> |                                 |  |   |  |
| <b>Family Size</b>                                 | <b>Baseline Mix Percentages</b> | <b>Number of Household Served in Plan Year</b> | <b>Percentage of Households Served in Plan Year</b> | <b>Percentage Change From Baseline Year to Current Plan Year</b> |
| 1 Person   | 45%                             | 1,716*   | 44%   | -1%  |
| 2 Person   | 20%                             | 1,046  | 27%   | +7%  |
| 3 Person   | 28%                             | 919  | 23%   | -5%  |
| 4 Person   | 6%                              | 205  | 5%  | -1%  |
| 5 Person   | 1%                              | 35   | 1%  | 0%   |
| 6+ Person  | 0%                              | 4  | 0%  | 0%   |
| <b>TOTAL</b>                                       | <b>100%</b>                     | <b>3,925</b>                                   | <b>100%</b>   | <b>0%</b>  |

\*Sum of 0 and 1 bedroom units

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

| <b>Number of Households Transitioned to Self-Sufficiency by Fiscal Year End</b> |  |  |
|---|--|--|
| <b>MTW Activity Name/Number</b>   | <b>Number of Households Transitioned to Self-Sufficiency</b> | <b>MTW PHA Local Definition of Self-Sufficiency</b>      |
| \$225 Rent Floor for Non-Elderly & Non-Disabled Households/Activity 1           | 17   | Able to pay \$225/month in rent                          |
|   | 0  | (Households Duplicated Across MTW Activities)            |
|   | <b>17</b>  | <b>Total Households Transitioned to Self Sufficiency</b> |

# **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:

For SS#1 & SS#3, tracking earned income in FY19, public housing residents earned a total income of \$8,532,561, making the average earned income of \$18,429 per household. 392 public housing residents were employed, and 71 public housing residents were unemployed, which excludes disabled and elderly residents. The FY19 outcome did not meet the benchmark of \$18,545 or 2% increase due to the RAD conversion of Citrus Square Apartments, a family site. The baseline and benchmark includes earned income from Citrus Square residents; the current average earned income does not. In the future, the OHA may change this baseline to exclude Citrus Square. HCV participants earned a total income of \$16,240,332 making the average earned income of \$13,916 per household. 848 HCV participants were employed, and 319 HCV participants were unemployed, which excludes disabled and elderly participants. The FY19 outcome exceeds the benchmark of \$12,515 or 2% increase.

For SS#4, tracking TANF recipients in FY19, 14 public housing residents received TANF, and 36 HCV participants received TANF. The FY19 outcomes are below the benchmarks of 1 or 2% decrease from the baselines of 48 public housing residents and 42 HCV participants.

For SS#5, tracking client referrals, 30 public housing residents and 41 HCV participants received self sufficiency services. The FY19 outcomes exceed the benchmarks of 1 or 1% increase from the baselines of 0 for both public housing and HCV.

For SS#6, tracking operating subsidy & HAP, the average public housing resident subsidy was \$245 and \$8,604 for HCV participants. The FY19 outcomes did not meet the public housing and HCV benchmarks of \$226 and \$7,631, respectively due to overall increases in market rent.

For SS#7, tracking the tenant rent share, the total rent roll for public housing was \$2,354,412 which is an average tenant rent share of \$424 per household. Although the total rent roll for FY19 did not meet the benchmark of \$2,574,504 or 2% increase, the OHA did achieve the benchmark of rent share at \$424 versus \$411 per unit. The total rent roll did not increase, but the total rent share, per resident, did. For HCV, the total rent roll was \$4,521,924, which is an average tenant rent share of \$323 per household. The FY19 outcome exceeds the benchmark of \$3,790,409 total rent roll or \$293 per unit month.

For SS#8, tracking client progress, 17 public housing residents and 0 HCV participants received self sufficiency. The OHA defines "self sufficiency" as being able to pay the \$225 rent floor. The FY19 outcome, for public housing, exceeds the benchmark of 1 or 1% increase from the baseline of 0 public housing residents. The FY19 outcome, for HCV, does not meet the benchmark of 1 or 1% increase due to the recent addition of HCV participants into the MTW Resource Center.

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 FY2019, the OHA referred 13 residents from public housing, and 41 HCV participants to the MTW Resource Center. A total of 71 residents and participants received services throughout the fiscal year. Seventeen (17) of those residents achieved self sufficiency, meaning, they were able to pay \$225 in rent. At the end of the year, there were 54 active participants at the MTW Resource Center.

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.

| <b>Self Sufficiency</b>  |                                   |  |                                   |                             |
|--|-----------------------------------|--|-----------------------------------|-----------------------------|
| <b>SS # 1: Increase in Household Income</b>  |                                   |  |                                   |                             |
| <b>Unit of Measurement</b>   | <b>Baseline</b>                   | <b>Benchmark</b>                                 | <b>Outcome</b>                    | <b>Benchmark Achieved?</b>  |
| Average earned income of households affected by this policy in dollars (increase). | <b>Public Housing</b><br>\$18,182 | <b>Public Housing</b><br>\$18,545 or 2% increase | <b>Public Housing</b><br>\$18,429 | <b>Public Housing</b><br>No |
|  | <b>HCV</b><br>\$12,270            | <b>HCV</b><br>\$12,515 or 2% increase            | <b>HCV</b><br>\$13,916            | <b>HCV</b><br>Yes           |

| <b>Self Sufficiency</b>   |   |                               |                       |                            |
|---|---|-------------------------------|-----------------------|----------------------------|
| <b>SS # 3: Increase in Positive Outcomes in Employment Status</b>   |   |                               |                       |                            |
| <b>Unit of Measurement</b><br>(Head of Household – HOH)   | <b>Baseline</b>                           | <b>Benchmark</b>              | <b>Outcome</b>        | <b>Benchmark Achieved?</b> |
| <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%   | 392                   | 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% | 2                     | Yes                        |
| (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%   | 71                    | No                         |
| (6) Other   | (6) Other                                 |                               |                       |                            |
| *OHA only tracks whether residents are employed, not whether they are employed full-time or part-time.  |   |                               |                       |                            |
| <i>Note: One resident that is enrolled in the educational program is also employed; the other resident enrolled in the educational program is unemployed.</i> |   |                               |                       |                            |

|   |   |  |  |  |
|---|---|--|--|--|
| <b>HCV</b><br>(1) Employed Full-Time<br>(2) Employed Part-Time<br>(3) Enrolled in an Educational Program<br>(4) Enrolled in Job Training Program<br>(5) Unemployed<br>(6) Other                       | <b>HCV</b><br>(1) Employed* - 730<br>(2) Employed *- 0<br>(3) Enrolled in an Educational Program** - 0<br>(4) Enrolled in Job Training Program** - 0<br>(5) Unemployed - 347<br>(6) Other           | <b>HCV</b><br>(1) Increase to 15 HOH or 2%<br>(2) N/A<br>(3) Increase to 1 HOH or 100%<br>(4) Increase to 1 HOH or 100%<br>(5) Decrease by 7 HOH or 2% | <b>HCV</b><br>848<br>N/A<br>1<br>0<br>319              | <b>HCV</b><br>Yes<br>N/A<br>Yes<br>No<br>Yes         |
| * OHA only tracks whether participants are employed, not whether they are employed full-time or part-time.<br><i>Note: The resident that is enrolled in the educational program is also employed.</i> |   |  |  |  |
| <b>Public Housing</b><br>(1) Employed Full-Time<br>(2) Employed Part-Time<br>(3) Enrolled in an Educational Program<br>(4) Enrolled in Job Training Program<br>(5) Unemployed<br>(6) Other            | <b>Public Housing</b><br>(1) Employed* - 88%<br>(2) Employed* - 0%<br>(3) Enrolled in an Educational Program - 0%<br>(4) Enrolled in Job Training Program - 0%<br>(5) Unemployed - 12%<br>(6) Other | <b>Public Housing</b><br>(1) 89% or 1% of HOHs<br>(2) N/A<br>(3) 1% or 1% of HOHs<br>(4) 1% or 1% of HOHs<br>(5) 11% or 1% of HOHs                     | <b>Public Housing</b><br>85%<br>N/A<br>0%<br>0%<br>15% | <b>Public Housing</b><br>No<br>N/A<br>No<br>No<br>No |
| * OHA only tracks whether residents are employed, not whether they are employed full-time or part-time.   |   |  |  |  |
| <b>HCV</b><br>(1) Employed Full-Time<br>(2) Employed Part-Time<br>(3) Enrolled in an Educational Program<br>(4) Enrolled in Job Training Program<br>(5) Unemployed<br>(6) Other                       | <b>HCV</b><br>(1) Employed* - 68%<br>(2) Employed* - 0%<br>(3) Enrolled in an Educational Program** - 0%<br>(4) Enrolled in Job Training Program** - 0%<br>(5) Unemployed - 32%<br>(6) Other        | <b>HCV</b><br>(1) 69% or 1% of HOHs<br>(2) N/A<br>(3) 1% or 1% of HOHs<br>(4) 1% or 1% of HOHs<br>(5) 31% or 1% of HOHs                                | <b>HCV</b><br>73%<br>N/A<br>0<br>0<br>27%              | <b>HCV</b><br>Yes<br>N/A<br>No<br>No<br>Yes          |
| * OHA only tracks whether participants are employed, not whether they are employed full-time or part-time.  |   |  |  |  |

## 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><br>48 | <b>Public Housing</b><br>1 or 2% decrease | <b>Public Housing</b><br>14 | <b>Public Housing</b><br>Yes |
|   | <b>HCV</b><br>42            | <b>HCV</b><br>1 or 2% decrease            | <b>HCV</b><br>36            | <b>HCV</b><br>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)  | <b>Public Housing</b><br>0 | <b>Public Housing</b><br>Increase by 1 or 1% | <b>Public Housing</b><br>30 | <b>Public Housing</b><br>Yes |
|  | <b>HCV</b><br>0            | <b>HCV</b><br>Increase by 1 or 1%            | <b>HCV</b><br>41            | <b>HCV</b><br>Yes            |
| <p><i>Note: 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.</i></p> <p><i>Note: Some households remain active in the resource center although they are paying \$225 because they continue to receive other services.</i></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><br>\$226 | <b>Public Housing</b><br>\$224 or 1% decrease | <b>Public Housing</b><br>\$245 | <b>Public Housing</b><br>No |
|   | <b>HCV</b><br>\$7,631          | <b>HCV</b><br>\$7,555 or 1% decrease          | <b>HCV</b><br>\$8,604          | <b>HCV</b><br>No            |

| 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><br>\$2,549,832 total rent roll or \$407 per unit month | <b>Public Housing</b><br>\$2,574,504 total rent roll or \$411 per unit month | <b>Public Housing</b><br>\$424 | <b>Public Housing</b><br>Yes |
|   | <b>HCV</b><br>\$3,752,880 total rent roll or \$290 per unit month            | <b>HCV</b><br>\$3,790,409 total rent roll or \$293 per unit month            | <b>HCV</b><br>\$323            | <b>HCV</b><br>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)  | <b>Public Housing</b><br>0 | <b>Public Housing</b><br>1 or 1% increase | <b>Public Housing</b><br>17 | <b>Public Housing</b><br>Yes |
|   | <b>HCV</b><br>0            | <b>HCV</b><br>1 or 1% increase            | <b>HCV</b><br>0             | <b>HCV</b><br>No             |
| <p><i>Note: 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>Note: The OHA definition for "self sufficiency" is to be paying \$225 in monthly rent</i></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 OHA special purpose 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 audits, review household composition and tax returns, and perform 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 \$90 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 \$97,254. The FY19 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 \$100,974. Although the FY19 outcome for HCV is above the benchmark of \$100,365 from the baseline of \$200,731, the outcome is much less than the baseline and is very close to the benchmark.

For CE#2, tracking employee productivity, the total time for staff to complete recertifications was 3,799 hours. The FY19 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 5,533 hours. The FY19 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. 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 FY19 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 was \$4,321,296 which is an average tenant rent share of \$311 per household. The FY19 outcome exceeds the benchmark of \$2,568,919 total rent roll or 174 per unit month. For HCV, the total rent roll was \$8,352,516, which is an average tenant rent share of \$260 per household. The FY19 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 FY19, public housing earned a total income of \$9,595,874 making the average earned income of \$8,279 per household. 468 public housing residents were employed, and 691 public housing residents were unemployed, which includes disabled and elderly residents. The FY19 outcome did not meet the benchmark of \$8,853 or 1% increase due to the RAD conversion of Citrus Square Apartments, a family site. The baseline and benchmark includes earned income from Citrus Square residents; the current average earned income does not. In the future, the OHA may change this baseline to exclude Citrus Square. HCV earned a total income of \$18,305,919, making the average earned income of \$6,843 per household. 1,007 HCV participants were employed, and 1,668 HCV participants were unemployed, which includes disabled and elderly participants. The FY19 outcome exceeds the benchmark of \$6,075 or 1% increase.

For SS#4, tracking TANF recipients in FY19, 40 public housing residents and 64 HCV participants received TANF. The FY19 outcomes are well below 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, 30 public housing residents and 41 HCV participants received self sufficiency services. The FY19 outcomes exceed the benchmarks of 1 or 1% increase from the baselines of 0 for both public housing and HCV.

For SS#8, tracking client progress, 17 public housing residents and 0 HCV participants received self sufficiency. The OHA defines "self sufficiency" as being able to pay the \$225 rent floor. The FY19 outcome, for public housing, exceeds the benchmark of 1 or 1% increase from the baseline of 0 public housing residents. The FY19 outcome, for HCV, does not meet the benchmark of 1 or 1% increase due to the recent addition of HCV participants into the MTW Resource Center.

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

Hardship Requests: Public housing had a total of 28 hardship requests. 21 of those hardships were approved, and 7 were denied. HCV had a total of 116 hardship requests. 76 of those hardships were approved, and 40 were denied.

Benchmark 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.

| <b>Cost Effectiveness</b>  |                                    |                                    |                                   |                              |
|--|------------------------------------|------------------------------------|-----------------------------------|------------------------------|
| <b>CE # 1: Agency Cost Savings</b>   |                                    |                                    |                                   |                              |
| <b>Unit of Measurement</b>   | <b>Baseline</b>                    | <b>Benchmark</b>                   | <b>Outcome</b>                    | <b>Benchmark Achieved?</b>   |
| Total cost of task in dollars (decrease)   | <b>Public Housing</b><br>\$340,080 | <b>Public Housing</b><br>\$170,040 | <b>Public Housing</b><br>\$97,254 | <b>Public Housing</b><br>Yes |
|  | <b>HCV</b><br>\$200,731            | <b>HCV</b><br>\$100,365            | <b>HCV</b><br>\$100,974           | <b>HCV</b><br>No             |
| <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> |                                    |                                    |                                   |                              |

| <b>Cost Effectiveness</b>  |                                       |                                      |                                |                              |
|--|---------------------------------------|--------------------------------------|--------------------------------|------------------------------|
| <b>CE # 2: Staff Time Savings</b>  |                                       |                                      |                                |                              |
| <b>Unit of Measurement</b>   | <b>Baseline</b>                       | <b>Benchmark</b>                     | <b>Outcome</b>                 | <b>Benchmark Achieved?</b>   |
| Total time to complete the task in staff hours (decrease).                                     | <b>Public Housing</b><br>12,480 hours | <b>Public Housing</b><br>6,240 hours | <b>Public Housing</b><br>3,799 | <b>Public Housing</b><br>Yes |
|  | <b>HCV</b><br>9,464 hours             | <b>HCV</b><br>4,732 hours            | <b>HCV</b><br>5,533            | <b>HCV</b><br>No             |
| <i>Note: These calculations are based upon an estimated time savings for recertifications.</i> |                                       |                                      |                                |                              |

| <b>Cost Effectiveness</b>  |                 |                  |                |                            |
|--|-----------------|------------------|----------------|----------------------------|
| <b>CE # 3: Decrease in Error Rate of Task Execution</b>            |                 |                  |                |                            |
| <b>Unit of Measurement</b>   | <b>Baseline</b> | <b>Benchmark</b> | <b>Outcome</b> | <b>Benchmark Achieved?</b> |
| Average error rate in completing a task as a percentage (decrease) | 0%              | 0%               | 0              | Yes                        |

| <b>Cost Effectiveness</b>                    |  |  |                                |                              |
|--|--|--|--------------------------------|------------------------------|
| <b>CE # 5: Increase in Tenant Rent Share</b> |  |  |                                |                              |
| <b>Unit of Measurement</b>                   | <b>Baseline</b>  | <b>Benchmark</b>   | <b>Outcome</b>                 | <b>Benchmark Achieved?</b>   |
| Tenant rent share in dollars (increase).     | <b>Public Housing</b><br>\$2,549,832 total rent roll or \$172 per unit month | <b>Public Housing</b><br>\$2,568,919 total rent roll or \$174 per unit month | <b>Public Housing</b><br>\$311 | <b>Public Housing</b><br>Yes |
|  | <b>HCV</b><br>\$7,366,272 total rent roll or \$249 per unit month            | <b>HCV</b><br>\$7,436,252 total rent roll or \$252 per unit month            | <b>HCV</b><br>\$260            | <b>HCV</b><br>Yes            |

| <b>Self Sufficiency</b>   |                                  |   |                                  |                             |
|---|----------------------------------|---|----------------------------------|-----------------------------|
| <b>SS # 1: Increase in Household Income</b>                                       |                                  |   |                                  |                             |
| <b>Unit of Measurement</b>  | <b>Baseline</b>                  | <b>Benchmark</b>                                | <b>Outcome</b>                   | <b>Benchmark Achieved?</b>  |
| Average earned income of households affected by this policy in dollars (increase) | <b>Public Housing</b><br>\$8,765 | <b>Public Housing</b><br>\$8,853 or 1% increase | <b>Public Housing</b><br>\$8,279 | <b>Public Housing</b><br>No |
|   | <b>HCV</b><br>\$6,015            | <b>HCV</b><br>\$6,075 or 1% increase            | <b>HCV</b><br>\$6,843            | <b>HCV</b><br>Yes           |

# Self Sufficiency

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

| <b>Unit of Measurement</b><br><small>(Head of Household – HOH)</small>  | <b>Baseline</b>   | <b>Benchmark</b>   | <b>Outcome</b>   | <b>Benchmark Achieved?</b>                            |
|---|---|--|--|---|
| <b>Public Housing</b><br>(1) Employed Full-Time<br>(2) Employed Part-Time<br>(3) Enrolled in an Educational Program<br>(4) Enrolled in Job Training Program<br>(5) Unemployed<br>(6) Other  | <b>Public Housing</b><br>(1) Employed* - 553<br>(2) Employed* - 0<br>(3) Enrolled in an Educational Program- 1<br>(4) Enrolled in Job Training Program – 0<br>(5) Unemployed - 679<br>(6) Other     | <b>Public Housing</b><br>(1) Increase by 6 HOH or 1%<br>(2) N/A<br>(3) Increase by 1 HOH or 100%<br>(4) Increase by 1 HOH or 100%<br>(5) Decrease by 7 HOH or 1% | <b>Public Housing</b><br>468<br>N/A<br>2<br>0<br>691   | <b>Public Housing</b><br>No<br>N/A<br>Yes<br>No<br>No |
| *OHA only tracks whether residents are employed, not whether they are employed full-time or part-time.<br><u>Note:</u> One resident that is enrolled in the educational program is also employed; the other resident enrolled in the educational program is unemployed. |   |  |  |   |
| <b>HCV</b><br>(1) Employed Full-Time<br>(2) Employed Part-Time<br>(3) Enrolled in an Educational Program<br>(4) Enrolled in Job Training Program<br>(5) Unemployed<br>(6) Other   | <b>HCV</b><br>(1) Employed* - 865<br>(2) Employed* - 0<br>(3) Enrolled in an Educational Program** – 0<br>(4) Enrolled in Job Training Program** – 0<br>(5) Unemployed - 1597<br>(6) Other          | <b>HCV</b><br>(1) Increase by 9 HOH or 1%<br>(2) N/A<br>(3) Increase by 1 HOH or 100%<br>(4) Increase by 1 HOH or 100%<br>(5) Decrease by 16 HOH or 1%           | <b>HCV</b><br>1,007<br>N/A<br>1<br>0<br>1,668          | <b>HCV</b><br>Yes<br>N/A<br>Yes<br>No<br>No           |
| *OHA only tracks whether participants are employed, not whether they are employed full-time or part-time.<br><u>Note:</u> The resident that is enrolled in the educational program is also employed.  |   |  |  |   |
| <b>Public Housing</b><br>(1) Employed Full-Time<br>(2) Employed Part-Time<br>(3) Enrolled in an Educational Program<br>(4) Enrolled in Job Training Program<br>(5) Unemployed<br>(6) Other  | <b>Public Housing</b><br>(1) Employed* – 45%<br>(2) Employed* – 0%<br>(3) Enrolled in an Educational Program – 0%<br>(4) Enrolled in Job Training Program – 0%<br>(5) Unemployed – 55%<br>(6) Other | <b>Public Housing</b><br>(1) 46% or 1% of HOHs<br>(2) N/A<br>(3) 1% or 1% of HOHs<br>(4) 1% or 1% of HOHs<br>(5) 54% or 1% of HOHs                               | <b>Public Housing</b><br>40%<br>N/A<br>0%<br>0%<br>60% | <b>Public Housing</b><br>No<br>N/A<br>No<br>No<br>No  |
| *OHA only tracks whether residents are employed, not whether they are employed full-time or part-time   |   |  |  |   |
| <b>HCV</b><br>(1) Employed Full-Time<br>(2) Employed Part-Time<br>(3) Enrolled in an Educational Program<br>(4) Enrolled in Job Training Program<br>(5) Unemployed<br>(6) Other   | <b>HCV</b><br>(1) Employed* – 35%<br>(2) Employed* – 0%<br>(3) Enrolled in an Educational Program** – 0%<br>(4) Enrolled in Job Training Program** – 0%<br>(5) Unemployed – 65%<br>(6) Other        | <b>HCV</b><br>(1) 36% or 1% of HOHs<br>(2) N/A<br>(3) 1% or 1% of HOHs<br>(4) 1% or 1% of HOHs<br>(5) 64% or 1% of HOHs  | <b>HCV</b><br>38%<br>N/A<br>0%<br>0%<br>62%            | <b>HCV</b><br>Yes<br>N/A<br>No<br>No<br>Yes           |
| *OHA only tracks whether participants are employed, not whether they are employed full-time or part-time.   |   |  |  |   |



| <b>Self Sufficiency</b>   |                             |  |                             |                              |
|---|-----------------------------|--|-----------------------------|------------------------------|
| <b>SS # 4: Households Removed from Temporary Assistance for Needy Families (TANF)</b> |                             |  |                             |                              |
| <b>Unit of Measurement</b>  | <b>Baseline</b>             | <b>Benchmark</b>                                     | <b>Outcome</b>              | <b>Benchmark Achieved?</b>   |
| Number of households receiving TANF assistance (decrease)                             | <b>Public Housing</b><br>76 | <b>Public Housing</b><br>1% or 1 household decreased | <b>Public Housing</b><br>40 | <b>Public Housing</b><br>Yes |
|   | <b>HCV</b><br>178           | <b>HCV</b><br>1% or 2 households decreased           | <b>HCV</b><br>64            | <b>HCV</b><br>Yes            |

| <b>Self Sufficiency</b>  |                            |  |                             |                              |
|--|----------------------------|--|-----------------------------|------------------------------|
| <b>SS # 5: Households Assisted by Services that Increase Self Sufficiency</b>  |                            |  |                             |                              |
| <b>Unit of Measurement</b>   | <b>Baseline</b>            | <b>Benchmark</b>                             | <b>Outcome</b>              | <b>Benchmark Achieved?</b>   |
| Number of households receiving services aimed to increase self sufficiency (increase)*   | <b>Public Housing</b><br>0 | <b>Public Housing</b><br>Increase by 1 or 1% | <b>Public Housing</b><br>30 | <b>Public Housing</b><br>Yes |
|  | <b>HCV</b><br>0            | <b>HCV</b><br>Increase by 1 or 1%            | <b>HCV</b><br>41            | <b>HCV</b><br>Yes            |
| <p><i>Note: 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.</i></p> <p><i>Note: Some households remain active in the resource center although they are paying \$225 because they continue to receive other services.</i></p> |                            |  |                             |                              |

| <b>Self Sufficiency</b>   |                            |   |                             |                              |
|---|----------------------------|---|-----------------------------|------------------------------|
| <b>SS # 8: Households Transitioned to Self Sufficiency</b>  |                            |   |                             |                              |
| <b>Unit of Measurement</b>  | <b>Baseline</b>            | <b>Benchmark</b>                          | <b>Outcome</b>              | <b>Benchmark Achieved?</b>   |
| Number of households transitioned to self sufficiency (increase)  | <b>Public Housing</b><br>0 | <b>Public Housing</b><br>1 or 1% increase | <b>Public Housing</b><br>17 | <b>Public Housing</b><br>Yes |
|   | <b>HCV</b><br>0            | <b>HCV</b><br>1 or 1% increase            | <b>HCV</b><br>0             | <b>HCV</b><br>No             |
| <p><i>Note: 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>Note: The OHA definition for "self sufficiency" is to be paying \$225 in monthly rent</i></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 \$216. The FY19 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 13.5 hours. The FY19 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. 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, 9 new project-based transitional housing units were leased in FY19. Units, damaged by the fire in FY18, have been repaired and are now online for leasing. The FY19 outcome did not meet the benchmark of 10 units or 20% increase from the baseline of 0 households. By the end of FY19, the OHA had helped 75 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.

| <b>Cost Effectiveness</b>  |                              |                              |                              |                              |
|--|------------------------------|------------------------------|------------------------------|------------------------------|
| <b>CE # 1: Agency Cost Savings</b>   |                              |                              |                              |                              |
| <b>Unit of Measurement</b>   | <b>Baseline</b>              | <b>Benchmark</b>             | <b>Outcome</b>               | <b>Benchmark Achieved?</b>   |
| Total cost of task in dollars (decrease)   | <b>Public Housing</b><br>N/A | <b>Public Housing</b><br>N/A | <b>Public Housing</b><br>N/A | <b>Public Housing</b><br>N/A |
|  | <b>HCV</b><br>\$200,731      | <b>HCV</b><br>\$100,365      | <b>HCV</b><br>\$216          | <b>HCV</b><br>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><br>Calculation: 13.5 hours x 15.99 average wage/hour = \$216 |                              |                              |                              |                              |

| <b>Cost Effectiveness</b>                                  |                              |                              |                              |                              |
|--|------------------------------|------------------------------|------------------------------|------------------------------|
| <b>CE # 2: Staff Time Savings</b>                          |                              |                              |                              |                              |
| <b>Unit of Measurement</b>                                 | <b>Baseline</b>              | <b>Benchmark</b>             | <b>Outcome</b>               | <b>Benchmark Achieved?</b>   |
| Total time to complete the task in staff hours (decrease). | <b>Public Housing</b><br>N/A | <b>Public Housing</b><br>N/A | <b>Public Housing</b><br>N/A | <b>Public Housing</b><br>N/A |
|  | <b>HCV</b><br>9,464 hours*   | <b>HCV</b><br>4,732 hours    | <b>HCV</b><br>13.5 hours     | <b>HCV</b><br>Yes            |
| Calculation: 1.5 hours x 9 households = 13.5 hours         |                              |                              |                              |                              |

| <b>Housing Choice</b>  |                              |  |                              |                              |
|--|------------------------------|--|------------------------------|------------------------------|
| <b>HC # 1: Additional Units of Housing Made Available</b>  |                              |  |                              |                              |
| <b>Unit of Measurement</b>   | <b>Baseline</b>              | <b>Benchmark</b>                       | <b>Outcome</b>               | <b>Benchmark Achieved?</b>   |
| Number of new housing units made available for homeless households as a result of the activity (increase). | <b>Public Housing</b><br>N/A | <b>Public Housing</b><br>N/A           | <b>Public Housing</b><br>N/A | <b>Public Housing</b><br>N/A |
|  | <b>HCV</b><br>0              | <b>HCV</b><br>10 units or 20% increase | <b>HCV</b><br>50             | <b>HCV</b><br>Yes            |

| <b>Housing Choice</b>   |                              |   |                              |                              |
|---|------------------------------|---|------------------------------|------------------------------|
| <b>HC # 5: Increase in Resident Mobility</b>  |                              |   |                              |                              |
| <b>Unit of Measurement</b>  | <b>Baseline</b>              | <b>Benchmark</b>                            | <b>Outcome</b>               | <b>Benchmark Achieved?</b>   |
| 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><br>N/A | <b>Public Housing</b><br>N/A                | <b>Public Housing</b><br>N/A | <b>Public Housing</b><br>N/A |
|   | <b>HCV</b><br>0              | <b>HCV</b><br>10 households or 20% increase | <b>HCV</b><br>9              | <b>HCV</b><br>No             |

| <b>Housing Choice</b>   |                              |   |                              |                              |
|---|------------------------------|---|------------------------------|------------------------------|
| <b>HC # 7: Households Assisted by Services that Increase Housing Choice</b>         |                              |   |                              |                              |
| <b>Unit of Measurement</b>  | <b>Baseline</b>              | <b>Benchmark</b>                            | <b>Outcome</b>               | <b>Benchmark Achieved?</b>   |
| Number of households receiving services aimed to increase housing choice (increase) | <b>Public Housing</b><br>N/A | <b>Public Housing</b><br>N/A                | <b>Public Housing</b><br>N/A | <b>Public Housing</b><br>N/A |
|   | <b>HCV</b><br>0              | <b>HCV</b><br>10 households or 20% increase | <b>HCV</b><br>9              | <b>HCV</b><br>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. There were no new project-based vouchers leased up in FY19 at West Oaks or Jackson Court/Division Oaks. A total of 75 project-based vouchers leased up since the inception of this activity. A fire occurred at West Oaks, in FY18, affecting 20 units; those units have been repaired and are now being leased. West Oaks is currently 100% occupied. Jackson Court and Division Oaks are presently both 97% 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.

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

| <b>Cost Effectiveness</b>                                  |   |   |   |   |
|--|---|---|---|---|
| <b>CE # 2: Staff Time Savings</b>                          |   |   |   |   |
| <b>Unit of Measurement</b>                                 | <b>Baseline</b>   | <b>Benchmark</b>  | <b>Outcome</b>  | <b>Benchmark Achieved?</b>                        |
| Total time to complete the task in staff hours (decrease). | <b>Public Housing</b><br>N/A<br><b>HCV</b><br>9,464 hours | <b>Public Housing</b><br>N/A<br><b>HCV</b><br>4,732 hours | <b>Public Housing</b><br>N/A<br><b>HCV</b><br>0 Hours | <b>Public Housing</b><br>N/A<br><b>HCV</b><br>Yes |

| <b>Cost Effectiveness</b>  |                 |                  |                |                            |
|--|-----------------|------------------|----------------|----------------------------|
| <b>CE # 3: Decrease in Error Rate of Task Execution</b>            |                 |                  |                |                            |
| <b>Unit of Measurement</b>   | <b>Baseline</b> | <b>Benchmark</b> | <b>Outcome</b> | <b>Benchmark Achieved?</b> |
| 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 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, and port-in vouchers. The households shall pay rent of at least \$100 after the provision of utility allowances.

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

For CE#5, tracking the tenant rent share, the total rent roll for public housing was \$4,321,296 which is an average tenant rent share of \$311 per household. The FY19 outcome exceeds the benchmark of \$2,568,919 total rent roll or 174 per unit month. For HCV, the total rent roll was \$8,352,516, which is an average tenant rent share of \$260 per household. The FY19 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 FY19, public housing earned a total income of \$9,595,874 making the average earned income of \$8,279 per household. 468 public housing residents were employed, and 691 public housing residents were unemployed, which includes disabled and elderly residents. The FY19 outcome did not meet the benchmark of \$8,853 or 1% increase due to the RAD conversion of Citrus Square Apartments, a family site. The baseline and benchmark includes earned income from Citrus Square residents; the current average earned income does not. In the future, the OHA may change this baseline to exclude Citrus Square. HCV earned a total income of \$18,305,919, making the average earned income of \$6,843 per household. 1,007 HCV participants were employed, and 1,668 HCV participants were unemployed, which includes disabled and elderly participants. The FY19 outcome exceeds the benchmark of \$6,075 or 1% increase.

For SS#4, tracking TANF recipients in FY19, 40 public housing residents and 64 HCV participants received TANF. The FY19 outcomes are well below 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, 17 public residents and 0 HCV participants received self sufficiency. The OHA defines "self sufficiency" as being able to pay the \$225 rent floor. The FY19 outcome, for public housing, 0 exceeds the benchmark of 1 or 1% increase from the baseline of 0 public housing residents. The FY19 outcome, for HCV, does not meet the benchmark of 1 or 1% increase due to the recent addition of HCV participants into the MTW Resource Center.

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.

| <b>Cost Effectiveness</b>                    |  |  |                                |                              |
|--|--|--|--------------------------------|------------------------------|
| <b>CE # 5: Increase in Tenant Rent Share</b> |  |  |                                |                              |
| <b>Unit of Measurement</b>                   | <b>Baseline</b>  | <b>Benchmark</b>   | <b>Outcome</b>                 | <b>Benchmark Achieved?</b>   |
| Tenant rent share in dollars (increase).     | <b>Public Housing</b><br>\$2,549,832 total rent roll or \$172 per unit month | <b>Public Housing</b><br>\$2,568,919 total rent roll or \$174 per unit month | <b>Public Housing</b><br>\$311 | <b>Public Housing</b><br>Yes |
|  | <b>HCV</b><br>\$7,366,272 total rent roll or \$249 per unit month            | <b>HCV</b><br>\$7,436,252 total rent roll or \$252 per unit month            | <b>HCV</b><br>\$260            | <b>HCV</b><br>Yes            |

| <b>Self Sufficiency</b>  |                                  |   |                                  |                             |
|--|----------------------------------|---|----------------------------------|-----------------------------|
| <b>SS # 1: Increase in Household Income</b>  |                                  |   |                                  |                             |
| <b>Unit of Measurement</b>   | <b>Baseline</b>                  | <b>Benchmark</b>                                | <b>Outcome</b>                   | <b>Benchmark Achieved?</b>  |
| Average earned income of households affected by this policy in dollars (increase). | <b>Public Housing</b><br>\$8,765 | <b>Public Housing</b><br>\$8,853 or 1% increase | <b>Public Housing</b><br>\$8,279 | <b>Public Housing</b><br>No |
|  | <b>HCV</b><br>\$6,015            | <b>HCV</b><br>\$6,075 or 1% increase            | <b>HCV</b><br>\$6,843            | <b>HCV</b><br>Yes           |

| <b>Self Sufficiency</b>  |   |  |  |   |
|--|---|--|--|---|
| <b>SS # 3: Increase in Positive Outcomes in Employment Status</b>  |   |  |  |   |
| <b>Unit of Measurement</b><br>(Head of Household – HOH)  | <b>Baseline</b>   | <b>Benchmark</b>   | <b>Outcome</b>                                       | <b>Benchmark Achieved?</b>                            |
| <b>Public Housing</b><br>(1) Employed Full-Time<br>(2) Employed Part-Time<br>(3) Enrolled in an Educational Program<br>(4) Enrolled in Job Training Program<br>(5) Unemployed<br>(6) Other | <b>Public Housing</b><br>(1) Employed* - 553<br>(2) Employed* - 0<br>(3) Enrolled in an Educational Program- 1<br>(4) Enrolled in Job Training Program – 0<br>(5) Unemployed - 679<br>(6) Other   | <b>Public Housing</b><br>(1) Increase by 6 HOH or 1%<br>(2) N/A<br>(3) Increase by 1 HOH or 100%<br>(4) Increase by 1 HOH or 100%<br>(5) Decrease by 7 HOH or 1% | <b>Public Housing</b><br>468<br>N/A<br>2<br>0<br>691 | <b>Public Housing</b><br>No<br>N/A<br>Yes<br>No<br>No |
|  | *OHA only tracks whether residents are employed, not whether they are employed full-time or part-time.<br><i>Note:</i> One resident that is enrolled in the educational program is also employed; the other resident enrolled in the educational program is unemployed. |  |  |   |
| <b>HCV</b><br>(1) Employed Full-Time<br>(2) Employed Part-Time<br>(3) Enrolled in an Educational Program<br>(4) Enrolled in Job Training Program<br>(5) Unemployed<br>(6) Other            | <b>HCV</b><br>(1) Employed* - 865<br>(2) Employed* - 0<br>(3) Enrolled in an Educational Program** - 0<br>(4) Enrolled in Job Training Program** - 0<br>(5) Unemployed - 1597<br>(6) Other  | <b>HCV</b><br>(1) Increase by 9 HOH or 1%<br>(2) N/A<br>(3) Increase by 1 HOH or 100%<br>(4) Increase by 1 HOH or 100%<br>(5) Decrease by 16 HOH or 1%           | <b>HCV</b><br>1,007<br>N/A<br>1<br>0<br>1,668        | <b>HCV</b><br>Yes<br>N/A<br>Yes<br>No<br>No           |
|  | * OHA only tracks whether participants are employed, not whether they are employed full-time or part-time.<br><i>Note:</i> The resident that is enrolled in the educational program is also employed.   |  |  |   |

|  |   |  |  |  |
|--|---|--|--|--|
| <b>Public Housing</b><br>(1) Employed Full-Time<br>(2) Employed Part-Time<br>(3) Enrolled in an Educational Program<br>(4) Enrolled in Job Training Program<br>(5) Unemployed<br>(6) Other | <b>Public Housing</b><br>(1) Employed* – 45%<br>(2) Employed* – 0%<br>(3) Enrolled in an Educational Program – 0%<br>(4) Enrolled in Job Training Program – 0%<br>(5) Unemployed – 55%<br>(6) Other | <b>Public Housing</b><br>(1) 46% or 1% of HOHs<br>(2) N/A<br>(3) 1% or 1% of HOHs<br>(4) 1% or 1% of HOHs<br>(5) 54% or 1% of HOHs | <b>Public Housing</b><br>40%<br>N/A<br>0%<br>0%<br>60% | <b>Public Housing</b><br>No<br>N/A<br>No<br>No<br>No |
| * OHA only tracks whether residents are employed, not whether they are employed full-time or part-time.  |   |  |  |  |
| <b>HCV</b><br>(1) Employed Full-Time<br>(2) Employed Part-Time<br>(3) Enrolled in an Educational Program<br>(4) Enrolled in Job Training Program<br>(5) Unemployed<br>(6) Other            | <b>HCV</b><br>(1) Employed* – 35%<br>(2) Employed* – 0%<br>(3) Enrolled in an Educational Program** – 0%<br>(4) Enrolled in Job Training Program** – 0%<br>(5) Unemployed – 65%<br>(6) Other        | <b>HCV</b><br>(1) 36% or 1% of HOHs<br>(2) N/A<br>(3) 1% or 1% of HOHs<br>(4) 1% or 1% of HOHs<br>(5) 64% or 1% of HOHs            | <b>HCV</b><br>38%<br>N/A<br>0%<br>0%<br>62%            | <b>HCV</b><br>No<br>N/A<br>No<br>No<br>No            |
| * OHA only tracks whether participants are employed, not whether they are employed full-time or part-time.   |   |  |  |  |

## 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><br>76* | <b>Public Housing</b><br>1% or 1 household decreased | <b>Public Housing</b><br>40 | <b>Public Housing</b><br>Yes |
|  | <b>HCV</b><br>178            | <b>HCV</b><br>1% or 2 households decreased           | <b>HCV</b><br>64            | <b>HCV</b><br>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)   | <b>Public Housing</b><br>0 | <b>Public Housing</b><br>1 or 1% increase | <b>Public Housing</b><br>17 | <b>Public Housing</b><br>Yes |
|  | <b>HCV</b><br>0            | <b>HCV</b><br>1 or 1% increase            | <b>HCV</b><br>0             | <b>HCV</b><br>No             |
| <i>Note: 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> |                            |   |                             |                              |
| <i>Note: The OHA definition for "self sufficiency" is to be paying \$225 in monthly rent</i>   |                            |   |                             |                              |



### **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 FY19 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, 8 participants were able to move to a better unit and/or neighborhood of opportunity in FY19 and 24 participants cumulatively over the life this activity. The FY19 outcome exceeds the benchmark of 2 from the baseline of 0 participants.

For CE#1, tracking staff time savings, the total cost to implement this activity was \$16 per month or a total of \$192 for the year. The FY19 outcome is below the benchmark of \$424/month from the baseline of \$0.

For CE#2, tracking employee productivity, the total staff time was 12 hours or 90 minutes per applicant. The FY19 outcome did not meet the benchmark of 85 minutes per application; however, the OHA was able to maintain the same productivity level from FY18.

For CE#3, tracking employee productivity, the average error rate in completing a task is 0%. The FY19 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.

| <b>Housing Choice</b>                                    |   |   |   |   |
|--|---|---|---|---|
| <b>HC # 3: Decrease in Wait List Time</b>                |   |   |   |   |
| <b>Unit of Measurement</b>                               | <b>Baseline</b>                                 | <b>Benchmark</b>                                | <b>Outcome</b>                                  | <b>Benchmark Achieved?</b>                        |
| Average applicant time on wait list in months (decrease) | <u>Public Housing</u><br>N/A<br><u>HCV</u><br>0 | <u>Public Housing</u><br>N/A<br><u>HCV</u><br>0 | <u>Public Housing</u><br>N/A<br><u>HCV</u><br>0 | <u>Public Housing</u><br>N/A<br><u>HCV</u><br>Yes |

| <b>Housing Choice</b>   |   |   |   |   |
|---|---|---|---|---|
| <b>HC # 5: Increase in Resident Mobility</b>  |   |   |   |   |
| <b>Unit of Measurement</b>  | <b>Baseline</b>                                 | <b>Benchmark</b>                                | <b>Outcome</b>                                  | <b>Benchmark Achieved?</b>                        |
| 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><br>N/A<br><u>HCV</u><br>0 | <u>Public Housing</u><br>N/A<br><u>HCV</u><br>2 | <u>Public Housing</u><br>N/A<br><u>HCV</u><br>8 | <u>Public Housing</u><br>N/A<br><u>HCV</u><br>Yes |

| <b>Cost Effectiveness</b>                |   |   |  |   |
|--|---|---|--|---|
| <b>CE # 1: Agency Cost Savings</b>       |   |   |  |   |
| <b>Unit of Measurement</b>               | <b>Baseline</b>                                   | <b>Benchmark</b>  | <b>Outcome</b>   | <b>Benchmark Achieved?</b>                        |
| Total cost of task in dollars (decrease) | <u>Public Housing</u><br>N/A<br><u>HCV</u><br>\$0 | <u>Public Housing</u><br>N/A<br><u>HCV</u><br>\$424/month | <u>Public Housing</u><br>N/A<br><u>HCV</u><br>\$192/year or \$16/month | <u>Public Housing</u><br>N/A<br><u>HCV</u><br>Yes |

| <b>Cost Effectiveness</b>                                  |  |  |  |  |
|--|--|--|--|--|
| <b>CE # 2: Staff Time Savings</b>                          |  |  |  |  |
| <b>Unit of Measurement</b>                                 | <b>Baseline</b>  | <b>Benchmark</b>   | <b>Outcome</b>   | <b>Benchmark Achieved?</b>                       |
| Total time to complete the task in staff hours (decrease). | <u>Public Housing</u><br>N/A<br><u>HCV</u><br>90 minutes | <u>Public Housing</u><br>N/A<br><u>HCV</u><br>Decrease by 5% or 85 minutes | <u>Public Housing</u><br>N/A<br><u>HCV</u><br>90 minutes | <u>Public Housing</u><br>N/A<br><u>HCV</u><br>No |

| <b>Cost Effectiveness</b>  |                 |                  |                |                            |
|--|-----------------|------------------|----------------|----------------------------|
| <b>CE # 3: Decrease in Error Rate of Task Execution</b>            |                 |                  |                |                            |
| <b>Unit of Measurement</b>   | <b>Baseline</b> | <b>Benchmark</b> | <b>Outcome</b> | <b>Benchmark Achieved?</b> |
| 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. The 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: The City of Orlando City Council approved the Memorandum of Understanding (MOU) between the OHA and City Community Redevelopment Authority (CRA) to implement the homeownership program east of Westmoreland Drive. Project-based vouchers may be part of the financing strategy to make homes affordable for low-moderate income purchasers. The OHA continues to work with the City to move the program forward. Also, the OHA is working with a developer to refine the development strategy for the 41 units proposed west of Westmoreland Avenue. This will include a combination of rental and homeownership opportunities.

### **Activity 13: Streamlined Public Housing Inspections**

Approval & Implementation Year: Activity 13 was first approved in FY2019. The phased-in implementation has yet to begin as planning is still underway.

Description: The OHA will streamline inspections by conducting UPSC public housing unit inspections, by tenant, every three years (triennial) in tandem with triennial recertifications. Triennial inspections will replace annual inspections, and the OHA will provide strategic preventive maintenance at all properties throughout each year. Randomly selected units will be chosen, from the 2/3 of public housing populace that will not receive the triennial inspection that fiscal year, for inspection. Those inspections will include building exterior/systems and common areas at all public housing properties. When tenants move out, the OHA will continue to conduct inspections those units, and if a tenant requests an inspection before his/her triennial inspection, the OHA will perform the inspection. Lastly, the OHA will continue to comply with all REAC inspections and conduct 100% pre-REAC inspections at each selected site annually. Based on the REAC protocol, 16 (sixteen) to 24 (twenty-four) units at each site will be randomly selected for inspection every year.

Actions Taken Towards Implementation:

Due to a large number of REAC inspections at OHA properties, the OHA opted to inspect all public housing units during FY2019. Also, in light of the OHA's ongoing repositioning plan, the OHA is currently determining the feasibility of this activity. If the OHA continues with this activity, it will be implemented in FY2020.

## 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 14, 2019.

#### 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 Fund A.

#### 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 a number of 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.

### 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 | OHA did not make any changes in the Plan Year |

# 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 FY2019. 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 fifteen (15) 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 FY2019 MTW program.

### **C. Certification Statement**

[Certification Statement to Follow]

### **D. MTW Energy Performance Contract (EPC) Flexibility Data**

N/A



ORLANDO HOUSING AUTHORITY

MOVING TO WORK (MTW)  
(APRIL 1, 2018 TO MARCH 31, 2019)

Section VI.C  
Certification Statement

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

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

Vivian Bryant, Esq.  
President/CEO

Date





# SECTION VII

## APPENDIX

## 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.