

FY2020

**The
Orlando
Housing
Authority**



**[MOVING TO WORK (MTW)
ANNUAL REPORT]**

Orlando Housing Authority
Executive Office
April 1, 2019 through March 31, 2020

FY2020 Moving to Work (MTW) Annual Report

April 1, 2019 – March 31, 2020

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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 ninth 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) Non-Elderly Persons with Disabilities (NED) vouchers
- (2) HUD Veterans Affairs Supportive Housing (VASH) vouchers
- (3) Single-Room Occupancy (SRO) vouchers
- (4) Family Unification Program (FUP) vouchers
- (5) Resident Opportunities and Supportive Services (ROSS)
- (6) Family Self-Sufficiency Program (FSS)
- (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. Washington Shores now 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 44 project-based vouchers to improve affordability for low-income families and seniors. The OHA and Lift Orlando may apply for the Choice Neighborhoods Action grant for Lake Mann Homes and/or Lorna Doone Apartments.

The OHA's long term plan for its non-MTW programs is to continue to manage its properties and to seek opportunities for OHA to increase its housing portfolio such that additional quality, affordable housing options are available to the community.

Rental Assistance Demonstration Program

In March 2015, the OHA received HUD approval for a Rental Assistance Demonstration (RAD) Portfolio application for Citrus Square Apartments (87 units). The Citrus Square RAD conversion closed on December 28, 2017. Ovation Housing LLLP owns Citrus Square, and Stephenson and Moore manage the property. As of February 2019, the occupancy rate is 93%. The office at Citrus Square is still under construction, and one (1) ADA unit is undergoing rehabilitation.

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

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 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 Terrance 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	5	4	Committed and Leased	No	Activity 6: Transitional Housing The OHA is project-basing up to fifty units to provide transitional housing to homeless individuals (up to twenty-four months) at West Oaks Apartments, a three story 280 unit affordable market rate rental property. The OHA is working with the Wayne Densch Center, Inc., the Orlando Union Rescue Mission, and other service providers to provide case management as a homelessness preventative measure. A total of fifty (50) vouchers/units are to be committed for Activity 6 by the end of FY2018.
Jackson Court/ Division Oaks/ West Oaks	0	3	Committed and Leased	No	Activity 8: PBVs in OHA Owned Units The OHA is project-basing up to 20% or 538 of its available tenant-based HCVs at OHA owned units. Jackson Court, Division Oaks, and West Oaks (in addition to the vouchers to be used in connection with Activity 6) are sites for the project-based voucher program.
Pendana at West Lake (Phase II)	24	0	Committed	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. Phase I is complete, and the OHA has dedicated 20 vouchers to that phase. Demolition is underway for phase II. The OHA is partnering by providing an additional 24 project-based vouchers to improve affordability for low-income seniors.

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Planned/Actual Total Newly Project-Based Vouchers

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

Actual Existing Project-Based Vouchers					
Property Name	Number of Project-Based Vouchers		Status at End of Plan Year	RAD?	Description of Project
	Planned	Actual			
West Oaks	50*	5	Committed and Leased	No	Activity 6: Transitional Housing The OHA is project-basing up to fifty units to provide transitional housing to homeless individuals (up to twenty-four months) at West Oaks Apartments, a three story 280 unit affordable market rate rental property. The OHA is working with the Wayne Densch Center, Inc., the Orlando Union Rescue Mission, and other service providers to provide case management as a homelessness preventative measure.
Jackson Court/ Division Oaks/West Oaks	538**	75	Committed and Leased	No	Activity 8: PBVs in OHA Owned Units The OHA is project-basing up to 20% or 538 of its available tenant-based HCVs at OHA owned units. Jackson Court, Division Oaks, and West Oaks (in addition to the vouchers to be used in connection with Activity 6) are sites for the project-based voucher program.
Pendana at West Lake (Phase I)	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

100

Planned/Actual Total Existing Project-Based Vouchers

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

**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); FY20 (4)

Activity 8: Actual PBVs issued over the fiscal years at West Oaks: FY15 (0); FY16 (0); FY17 (0); FY18 (3); FY19 (0); FY20 (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); FY20 (3)

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 mold, termites, and VCA related construction.

General Description of All Actual Capital Expenditures During the Plan Year

In FY2020, the OHA spent \$1,856,574 in Capital Fund expenditures for its public housing sites including computer systems upgrades. This included \$262,794 in physical needs assessments required for the repositioning of six properties, \$341,565 for systems and computer upgrades, \$216,000 for playground replacements, and \$1,036,215 for various capital improvements across OHA properties.

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	13,668	1,458	1,139
MTW Housing Choice Voucher (HCV) Utilized	28,728	31,260	2,394	2,605
Local, Non-Traditional: Tenant-Based	0	0	0	0
Local, Non-Traditional: Property-Based	1,704	1,044	142	87
Local, Non-Traditional: Homeownership	0	0	0	0

Planned/Actual Totals	47,928	45,972	3,994	3,831
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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	600	108	50	9
Property-Based	Activity 8: PBVs in OHA Owned Units	1104	936	92	78
Homeownership					

Planned/Actual Totals	1,704	1,044	142	87
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Households Receiving Local Non-Traditional Services Only	Average Number of Households Served Per Month	Total Number of Households in the Plan Year
N/A	0	0

Discussion of Any Actual/Issues/Solutions Related to Leasing	
Housing Program	Description of Actual Leasing Issues and Solutions
Public Housing	<p>The chief issue related to leasing public housing units is that a substantial number of applicants fail the criminal background checks; however, HUD has changed its stance on criminal background checks which should remedy this issue. The OHA has also reduced the criminal background check eligibility period from ten years to five years.</p> <p>Other issues impacting public housing occupancy include mold, mildew, termites, and VCA unit modifications. The OHA has requested and received approval from HUD to remove units from occupancy in order to complete mold and mildew remediation and to repair damages caused by termites.</p>
Housing Choice Voucher (HCV)	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	13,016	Open	Yes
MTW Housing Choice Voucher	Community Wide	5,814	Closed	No
MTW Public Housing Units	Site-Based*	897	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	24
Below 30% Area Median Income	56

Total Local, Non-Traditional Households Admitted **87**

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%
TOTAL	1,463	2,578	N/A	4,041	100%

*Sum of 0 and 1 bedroom units

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

Maintain Comparable Mix				
Mix of Families Sized Served (In Plan Year)				
Family Size	Baseline Mix Percentages	Number of Household Served in Plan Year	Percentage of Households Served in Plan Year	Percentage Change From Baseline Year to Current Plan Year
1 Person	45%	1,691	45%	0%
2 Person	20%	995	27%	35%
3 Person	28%	834	22%	-21%
4 Person	6%	188	5%	-17%
5 Person	1%	33	1%	0%
6+ Person	0%	3	0%	0%
TOTAL	100%	3,744	100%	-3%

*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.

Number of Households Transitioned to Self-Sufficiency by Fiscal Year End		
MTW Activity Name/Number	Number of Households Transitioned to Self-Sufficiency	MTW PHA Local Definition of Self-Sufficiency
\$225 Rent Floor for Non-Elderly & Non-Disabled Households/Activity 1	2	Able to pay \$225/month in rent
	0	(Households Duplicated Across MTW Activities)
	2	Total Households Transitioned to Self Sufficiency

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 Minimum Rent 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: This activity established a self-sufficiency rent floor of \$225 for households that are not elderly and not disabled. In FY2020, the OHA modified this activity from a \$225 rent floor to a \$225 minimum rent and added a minimum work requirement. Additional rent reform measures, such as the elimination of all household deductions and a standard utility allowance based on bedroom size, were also added to simplify rent calculations, increase revenue for the OHA, and encourage self-sufficiency. The \$225 rent floor and \$225 minimum rent provides hardship exceptions linked to self-sufficiency activities, and includes a referral to the MTW Resource Center, which provides self-sufficiency services to residents and participants.

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

For SS#1 & SS#3, tracking earned income in FY20, public housing residents earned a total income of \$7,503,837, making the average earned income of \$19,340 per household. 331 public housing residents were employed, and 57 public housing residents were unemployed, which excludes disabled and elderly residents. The FY20 outcome exceeds the benchmark of \$18,545 or 2% increase. HCV participants earned a total income of \$15,957,500 making the average earned income of \$14,707 per household. 781 HCV participants were employed, and 304 HCV participants were unemployed, which excludes disabled and elderly participants. The FY20 outcome exceeds the benchmark of \$12,515 or 2% increase.

For SS#4, tracking TANF recipients in FY20, 14 public housing residents received TANF, and 43 HCV participants received TANF. The FY20 outcome for public housing is below the benchmark of 1 or 2% decrease from the baseline of 48 public housing residents. The FY20 outcome for HCV is only slightly above the benchmark of 1 or 2% decrease from the baseline of 42 HCV participants.

For SS#5, tracking client referrals, 13 public housing residents and 57 HCV participants received self-sufficiency services. The FY20 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 yearly public housing resident subsidy was \$2,554 and \$8,822 for HCV participants. The FY20 outcome for public housing is below the benchmark of \$2,691 or a 1% decrease. The FY20 outcome for HCV did not meet the benchmark of \$7,555 or 1% decrease due to an increase in market rent.

For SS#7, tracking the tenant rent share, the total rent roll for public housing was \$2,133,204 which is an average tenant rent share of \$458 per household. Although the FY20 total rent roll is less than the benchmark of 2,574,504, the FY20 average tenant rent share exceeds the benchmark of \$411 per unit month. For HCV, the total rent roll was \$4,494,840, which is an average tenant rent share of \$345 per household. The FY20 outcome exceeds the benchmark of \$3,790,409 total rent roll or \$293 per unit month.

For SS#8, tracking client progress, 2 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 FY20 outcome, for public housing, exceeds the benchmark of 1 or 1% increase from the baseline of 0 public housing residents. The FY20 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, who are not employed, who are not employed the minimum number of hours (28 hrs/wk or 20 hrs/wk if full-time student), or who are experiencing an employment related hardship. It includes, but is 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 childcare 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.

During FY2020, the OHA referred four residents from public housing, and 16 HCV participants to the MTW Resource Center. A total of 70 residents and participants received services throughout the fiscal year. Two (2) of those residents achieved self-sufficiency, meaning, they were able to pay \$225 in rent. At the end of the year, there were 67 active participants at the MTW Resource Center.

Benchmarks Achieved: See metrics.

Actual Non-Significant Changes: None.

Actual Changes to Metrics/Data Collection: Changed the public housing subsidy metric to yearly from monthly to match the HCV analysis for Self Sufficiency #6: Reducing Per Unit Subsidy Costs for Participating Households.

Actual Significant Changes: None.

Challenges in Achieving Benchmarks and Possible Strategies: None.

Self Sufficiency				
SS # 1: Increase in Household Income				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase).	Public Housing \$18,182	Public Housing \$18,545 or 2% increase	Public Housing \$19,340	Public Housing Yes
	HCV \$12,270	HCV \$12,515 or 2% increase	HCV \$14,707	HCV Yes

Self Sufficiency				
SS # 3: Increase in Positive Outcomes in Employment Status				
Unit of Measurement (Head of Household – HOH)	Baseline	Benchmark	Outcome	Benchmark Achieved?
Public Housing	Public Housing	Public Housing	Public Housing	Public Housing
(1) Employed Full-Time	(1) Employed* - 460	(1) Increase by 9 HOH or 2%	331	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%	57	Yes
(6) Other	(6) Other			
*OHA only tracks whether residents are employed, not whether they are employed full-time or part-time.				
<u>Note:</u> The two residents that are enrolled in an educational program are also employed.				

HCV (1) Employed Full-Time (2) Employed Part-Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other	HCV (1) Employed* - 730 (2) Employed* - 0 (3) Enrolled in an Educational Program - 0 (4) Enrolled in Job Training Program - 0 (5) Unemployed - 347 (6) Other	HCV (1) Increase to 15 HOH or 2% (2) N/A (3) Increase to 1 HOH or 100% (4) Increase to 1 HOH or 100% (5) Decrease by 7 HOH or 2%	HCV 781 N/A 3 0 304	HCV Yes N/A Yes No Yes
* OHA only tracks whether participants are employed, not whether they are employed full-time or part-time. <i>Note:</i> The three residents that are enrolled in the educational program are also employed.				
Public Housing (1) Employed Full-Time (2) Employed Part-Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other	Public Housing (1) Employed* - 88% (2) Employed* - 0% (3) Enrolled in an Educational Program - 0% (4) Enrolled in Job Training Program - 0% (5) Unemployed - 12% (6) Other	Public Housing (1) 89% or 1% of HOHs (2) N/A (3) 1% or 1% of HOHs (4) 1% or 1% of HOHs (5) 11% or 1% of HOHs	Public Housing 85% N/A 0% 0% 15%	Public Housing No N/A No No No
* OHA only tracks whether residents are employed, not whether they are employed full-time or part-time.				
HCV (1) Employed Full-Time (2) Employed Part-Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other	HCV (1) Employed* - 68% (2) Employed* - 0% (3) Enrolled in an Educational Program - 0% (4) Enrolled in Job Training Program - 0% (5) Unemployed - 32% (6) Other	HCV (1) 69% or 1% of HOHs (2) N/A (3) 1% or 1% of HOHs (4) 1% or 1% of HOHs (5) 31% or 1% of HOHs	HCV 72% N/A 0% 0% 28%	HCV Yes N/A No No 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)	Public Housing 48	Public Housing 1 or 2% decrease	Public Housing 14	Public Housing Yes
	HCV 42	HCV 1 or 2% decrease	HCV 43	HCV No

Self Sufficiency

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

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase self-sufficiency (increase)	Public Housing 0	Public Housing Increase by 1 or 1%	Public Housing 13	Public Housing Yes
	HCV 0	HCV Increase by 1 or 1%	HCV 57	HCV Yes
<i>Note:</i> 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.				

Self Sufficiency

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

<i>Unit of Measurement</i>	<i>Baseline</i>	<i>Benchmark</i>	<i>Outcome</i>	<i>Benchmark Achieved?</i>
Average amount of Section 8 and/or 9 subsidy per households affected by this policy in dollars (decrease)	Public Housing \$2,718	Public Housing \$2,691 or 1% decrease	Public Housing \$2,554	Public Housing Yes
	HCV \$7,631	HCV \$7,555 or 1% decrease	HCV \$8,822	HCV No

Self Sufficiency

SS # 7: Increase in Tenant Rent Share

<i>Unit of Measurement</i>	<i>Baseline</i>	<i>Benchmark</i>	<i>Outcome</i>	<i>Benchmark Achieved?</i>
Tenant rent share in dollars (increase)	Public Housing \$2,549,832 total rent roll or \$407 per unit month	Public Housing \$2,574,504 total rent roll or \$411 per unit month	Public Housing \$458	Public Housing Yes
	HCV \$3,752,880 total rent roll or \$290 per unit month	HCV \$3,790,409 total rent roll or \$293 per unit month	HCV \$345	HCV Yes

Self Sufficiency

SS # 8: Households Transitioned to Self Sufficiency

<i>Unit of Measurement</i>	<i>Baseline</i>	<i>Benchmark</i>	<i>Outcome</i>	<i>Benchmark Achieved?</i>
Number of households transitioned to self-sufficiency (increase)	Public Housing 0	Public Housing 1 or 1% increase	Public Housing 2	Public Housing Yes
	HCV 0	HCV 1 or 1% increase	HCV 0	HCV No
<p><i>Note:</i> OHA realizes that the requirements for the baseline are not conducive to accurately reflecting the progress of this particular metric - transition to self-sufficiency.</p> <p>The OHA definition for "self-sufficiency" is to be paying \$225 in TTP monthly OR heads and/or co-heads of households that are employed at least 28 hours a week or 20 hours a week if a full-time student.</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: The OHA is streamlining the recertification process in the public housing and housing choice voucher programs by conducting recertification of all public housing residents and HCV participants every three years (triennial). This means that every three years, residents and participants come into the office to conduct the traditional recertification with the exception of a modified 3rd party verification and \$25,000 asset disregard. All aspects of this activity also apply to NED, FUP, VASH, and 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 \$300 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 \$149,571. The FY20 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 \$246,355. The FY20 outcome for HCV is above the benchmark of \$100,365 from the baseline of \$200,731.

For CE#2, tracking employee productivity, the total time for staff to complete recertifications was 5,672 hours. The FY20 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 13,104 hours. The FY20 outcome for HCV did not meet the benchmark of 4,732 hours from the baseline of 9,464 hours. 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 FY20 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 \$3,981,336, which is an average tenant rent share of \$317 per household. The FY20 outcome exceeds the benchmark of \$2,568,919 total rent roll or 174 per unit month. For HCV, the total rent roll was \$8,245,140, which is an average tenant rent share of \$264 per household. The FY20 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 FY20, public housing earned a total income of \$8,733,890 making the average earned income of \$8,358 per household. 403 public housing residents were employed, and 642 public housing residents were unemployed, which includes disabled and elderly residents. The FY20 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 \$18,344,946, making the average earned income of \$7,042 per household. 963 HCV participants were employed, and 1,642 HCV participants were unemployed, which includes disabled and elderly participants. The FY20 outcome exceeds the benchmark of \$6,075 or 1% increase.

For SS#4, tracking TANF recipients in FY20, 32 public housing residents and 71 HCV participants received TANF. The FY20 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, 13 public housing residents and 57 HCV participants received self-sufficiency services. The FY20 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, 2 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 FY20 outcome, for public housing, exceeds the benchmark of 1 or 1% increase from the baseline of 0 public housing residents. The FY20 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 24 hardship requests. 20 of those hardships were approved, and 4 were denied. HCV had a total of 206 hardship requests. 141 of those hardships were approved and 65 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.

Cost Effectiveness

CE # 1: Agency Cost Savings

<i>Unit of Measurement</i>	<i>Baseline</i>	<i>Benchmark</i>	<i>Outcome</i>	<i>Benchmark Achieved?</i>
Total cost of task in dollars (decrease)	<u>Public Housing</u> \$340,080	<u>Public Housing</u> \$170,040	<u>Public Housing</u> \$149,571	<u>Public Housing</u> Yes
	<u>HCV</u> \$200,731	<u>HCV</u> \$100,365	<u>HCV</u> \$246,355	<u>HCV</u> No
<i>Note:</i> 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.				

Cost Effectiveness

CE # 2: Staff Time Savings

<i>Unit of Measurement</i>	<i>Baseline</i>	<i>Benchmark</i>	<i>Outcome</i>	<i>Benchmark Achieved?</i>
Total time to complete the task in staff hours (decrease).	<u>Public Housing</u> 12,480 hours	<u>Public Housing</u> 6,240 hours	<u>Public Housing</u> 5,672	<u>Public Housing</u> Yes
	<u>HCV</u> 9,464 hours	<u>HCV</u> 4,732 hours	<u>HCV</u> 13,104	<u>HCV</u> No
<i>Note:</i> These calculations are based upon an estimated time savings for recertifications.				

Cost Effectiveness

CE # 3: Decrease in Error Rate of Task Execution

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

Cost Effectiveness

CE # 5: Increase in Tenant Rent Share

<i>Unit of Measurement</i>	<i>Baseline</i>	<i>Benchmark</i>	<i>Outcome</i>	<i>Benchmark Achieved?</i>
Tenant rent share in dollars (increase).	<u>Public Housing</u> \$2,549,832 total rent roll or \$172 per unit month	<u>Public Housing</u> \$2,568,919 total rent roll or \$174 per unit month	<u>Public Housing</u> \$317	<u>Public Housing</u> Yes
	<u>HCV</u> \$7,366,272 total rent roll or \$249 per unit month	<u>HCV</u> \$7,436,252 total rent roll or \$252 per unit month	<u>HCV</u> \$264	<u>HCV</u> Yes

Self Sufficiency

SS # 1: Increase in Household Income

<i>Unit of Measurement</i>	<i>Baseline</i>	<i>Benchmark</i>	<i>Outcome</i>	<i>Benchmark Achieved?</i>
Average earned income of households affected by this policy in dollars (increase)	<u>Public Housing</u> \$8,765	<u>Public Housing</u> \$8,853 or 1% increase	<u>Public Housing</u> \$8,358	<u>Public Housing</u> No
	<u>HCV</u> \$6,015	<u>HCV</u> \$6,075 or 1% increase	<u>HCV</u> \$7,042	<u>HCV</u> Yes

Self Sufficiency

SS # 3: Increase in Positive Outcomes in Employment Status

Unit of Measurement (Head of Household – HOH)	Baseline	Benchmark	Outcome	Benchmark Achieved?
Public Housing (1) Employed Full-Time (2) Employed Part-Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other	Public Housing (1) Employed* - 553 (2) Employed* - 0 (3) Enrolled in an Educational Program- 1 (4) Enrolled in Job Training Program – 0 (5) Unemployed - 679 (6) Other	Public Housing (1) Increase by 6 HOH or 1% (2) N/A (3) Increase by 1 HOH or 100% (4) Increase by 1 HOH or 100% (5) Decrease by 7 HOH or 1%	Public Housing 403 N/A 2 0 642	Public Housing No N/A Yes No Yes
*OHA only tracks whether residents are employed, not whether they are employed full-time or part-time. <i>Note:</i> The two residents that are enrolled in an educational program are also employed.				
HCV (1) Employed Full-Time (2) Employed Part-Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other	HCV (1) Employed* - 865 (2) Employed* - 0 (3) Enrolled in an Educational Program – 0 (4) Enrolled in Job Training Program – 0 (5) Unemployed - 1597 (6) Other	HCV (1) Increase by 9 HOH or 1% (2) N/A (3) Increase by 1 HOH or 100% (4) Increase by 1 HOH or 100% (5) Decrease by 16 HOH or 1%	HCV 963 N/A 3 0 1642	HCV Yes N/A Yes No No
*OHA only tracks whether participants are employed, not whether they are employed full-time or part-time. <i>Note:</i> The three residents that are enrolled in the educational program are also employed.				
Public Housing (1) Employed Full-Time (2) Employed Part-Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other	Public Housing (1) Employed* – 45% (2) Employed* – 0% (3) Enrolled in an Educational Program – 0% (4) Enrolled in Job Training Program – 0% (5) Unemployed – 55% (6) Other	Public Housing (1) 46% or 1% of HOHs (2) N/A (3) 1% or 1% of HOHs (4) 1% or 1% of HOHs (5) 54% or 1% of HOHs	Public Housing 39% N/A 0% 0% 61%	Public Housing No N/A No No No
*OHA only tracks whether residents are employed, not whether they are employed full-time or part-time				
HCV (1) Employed Full-Time (2) Employed Part-Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other	HCV (1) Employed* – 35% (2) Employed* – 0% (3) Enrolled in an Educational Program – 0% (4) Enrolled in Job Training Program – 0% (5) Unemployed – 65% (6) Other	HCV (1) 36% or 1% of HOHs (2) N/A (3) 1% or 1% of HOHs (4) 1% or 1% of HOHs (5) 64% or 1% of HOHs	HCV 37% N/A 0% 0% 63%	HCV Yes N/A No No 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)	<u>Public Housing</u> 76	<u>Public Housing</u> 1% or 1 household decreased	<u>Public Housing</u> 32	<u>Public Housing</u> Yes
	<u>HCV</u> 178	<u>HCV</u> 1% or 2 households decreased	<u>HCV</u> 71	<u>HCV</u> Yes

Self Sufficiency

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

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase self-sufficiency (increase)	<u>Public Housing</u> 0	<u>Public Housing</u> Increase by 1 or 1%	<u>Public Housing</u> 13	<u>Public Housing</u> Yes
	<u>HCV</u> 0	<u>HCV</u> Increase by 1 or 1%	<u>HCV</u> 57	<u>HCV</u> Yes
<p><i>Note:</i> Services aimed to increase self-sufficiency are defined as the services associated with activity 1, and households receiving services are those that have received a referral and have had an assessment.</p> <p><i>Note:</i> Some households remain active in the resource center although they are paying \$225 because they continue to receive other services.</p>				

Self Sufficiency

SS # 8: Households Transitioned to Self Sufficiency

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self-sufficiency (increase)	<u>Public Housing</u> 0	<u>Public Housing</u> 1 or 1% increase	<u>Public Housing</u> 2	<u>Public Housing</u> Yes
	<u>HCV</u> 0	<u>HCV</u> 1 or 1% increase	<u>HCV</u> 0	<u>HCV</u> No
<p><i>Note:</i> OHA realizes that the requirements for the baseline are not conducive to accurately reflecting the progress of this particular metric - transition to self-sufficiency.</p> <p><i>Note:</i> The OHA definition for "self-sufficiency" is to be paying \$225 in TTP monthly OR heads and/or co-heads of households that are employed at least 28 hours a week or 20 hours a week if a full-time student.</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: The OHA is providing 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 \$222. The FY20 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 FY20 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, 4 new project-based transitional housing units were leased in FY20. During FY20, the OHA was able to continue assisting 5 households, for a total of 9 households served. The FY20 outcome did not meet the benchmark of 10 units or 20% increase from the baseline of 0 households. By the end of FY20, the OHA had helped 79 households cumulatively.

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

Benchmarks Achieved: Please see metrics.

Actual Non-Significant Changes: None.

Actual Changes to Metrics/Data Collection: None.

Actual Significant Changes: None.

Challenges in Achieving Benchmarks and Possible Strategies: None.

Cost Effectiveness

CE # 1: Agency Cost Savings

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease)	<u>Public Housing</u> N/A	<u>Public Housing</u> N/A	<u>Public Housing</u> N/A	<u>Public Housing</u> N/A
	<u>HCV</u> \$200,731	<u>HCV</u> \$100,365	<u>HCV</u> \$222	<u>HCV</u> Yes
<i>Note: These calculations are based upon an estimated time savings and resulting cost savings. Calculations include estimated benefits but do not include overhead costs.</i>				

Cost Effectiveness

CE # 2: Staff Time Savings

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	<u>Public Housing</u> N/A	<u>Public Housing</u> N/A	<u>Public Housing</u> N/A	<u>Public Housing</u> N/A
	<u>HCV</u> 9,464 hours	<u>HCV</u> 4,732 hours	<u>HCV</u> 13.5 hours	<u>HCV</u> Yes

Housing Choice

HC # 1: Additional Units of Housing Made Available

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of new housing units made available for homeless households as a result of the activity (increase).	<u>Public Housing</u> N/A	<u>Public Housing</u> N/A	<u>Public Housing</u> N/A	<u>Public Housing</u> N/A
	<u>HCV</u> 0	<u>HCV</u> 10 units or 20% increase	<u>HCV</u> 50	<u>HCV</u> Yes

Housing Choice

HC # 5: Increase in Resident Mobility

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	<u>Public Housing</u> N/A	<u>Public Housing</u> N/A	<u>Public Housing</u> N/A	<u>Public Housing</u> N/A
	<u>HCV</u> 0	<u>HCV</u> 10 households or 20% increase	<u>HCV</u> 4	<u>HCV</u> No

Housing Choice

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

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase housing choice (increase)	<u>Public Housing</u> N/A	<u>Public Housing</u> N/A	<u>Public Housing</u> N/A	<u>Public Housing</u> N/A
	<u>HCV</u> 0	<u>HCV</u> 10 households or 20% increase	<u>HCV</u> 9	<u>HCV</u> No

Activity 8: Project-Based Vouchers in OHA Owned Units

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

Description: The OHA is project basing 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 is 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 three new project-based vouchers leased up in FY20 at West Oaks or Jackson Court/Division Oaks. A total of 78 project-based vouchers leased up since the inception of this activity. 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.

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

Cost Effectiveness

CE # 2: Staff Time Savings

<i>Unit of Measurement</i>	<i>Baseline</i>	<i>Benchmark</i>	<i>Outcome</i>	<i>Benchmark Achieved?</i>
Total time to complete the task in staff hours (decrease).	<u>Public Housing</u> N/A <u>HCV</u> 9,464 hours	<u>Public Housing</u> N/A <u>HCV</u> 4,732 hours	<u>Public Housing</u> N/A <u>HCV</u> 0 Hours	<u>Public Housing</u> N/A <u>HCV</u> Yes

Cost Effectiveness

CE # 3: Decrease in Error Rate of Task Execution

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

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

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

Description: The OHA utilized its MTW flexibilities to establish a minimum rent that exceeds \$50 for both the public housing and HCV programs. The OHA established an agency-wide minimum rent of \$100 for public housing, HCV, TBRA, PBV, OHA Special Purpose vouchers, FUP, NED, Port-ins, and SRO. Each household shall pay rent of at least \$100 after the provision of utility allowances.

Only VASH participants and homeless participants of the OHA Homelessness Prevention Program (Activity 10) are exempt from the \$100 minimum rent. Participants with income pay a minimum rent of fifty dollars (\$50.00), and participants with zero income pay zero dollars (\$0.00).

In FY2020, the OHA received approval to further augment the \$100 minimum rent. To simplify rent calculations and increase revenue for the OHA, all household deductions were eliminated and each household is given a standard utility allowance based on bedroom size.

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 \$3,981,336 which is an average tenant rent share of \$317 per household. The FY20 outcome exceeds the benchmark of \$2,568,919 total rent roll or \$174 per unit month. For HCV, the total rent roll was \$8,245,140, which is an average tenant rent share of \$264 per household. The FY20 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 FY20, public housing earned a total income of \$8,733,890 making the average earned income of \$8,358 per household. 403 public housing residents were employed, and 642 public housing residents were unemployed, which includes disabled and elderly residents. The FY20 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 \$18,344,946, making the average earned income of \$7,042 per household. 963 HCV participants were employed, and 1,642 HCV participants were unemployed, which includes disabled and elderly participants. The FY20 outcome exceeds the benchmark of \$6,075 or 1% increase.

For SS#4, tracking TANF recipients in FY20 32 public housing residents and 71 HCV participants received TANF. The FY20 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, 2 public residents and 0 HCV participants received self-sufficiency. The OHA has two definitions of "self-sufficiency:" (1) Being able to pay the \$225 rent floor, and (2) heads and/or co-heads of households that are employed at least 28 hours a week or 20 hours a week if a full-time student. The FY20 outcome, for public housing, exceeds the benchmark of 1 or 1% increase from the baseline of 0 public housing residents. The FY20 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.

Cost Effectiveness

CE # 5: Increase in Tenant Rent Share

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Tenant rent share in dollars (increase).	Public Housing \$2,549,832 total rent roll or \$172 per unit month HCV \$7,366,272 total rent roll or \$249 per unit month	Public Housing \$2,568,919 total rent roll or \$174 per unit month HCV \$7,436,252 total rent roll or \$252 per unit month	Public Housing \$317 HCV \$264	Public Housing Yes HCV Yes

Self Sufficiency

SS # 1: Increase in Household Income

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase).	Public Housing \$8,765 HCV \$6,015	Public Housing \$8,853 or 1% increase HCV \$6,075 or 1% increase	Public Housing \$8,358 HCV \$7,042	Public Housing No HCV Yes

Self Sufficiency

SS # 3: Increase in Positive Outcomes in Employment Status

Unit of Measurement (Head of Household – HOH)	Baseline	Benchmark	Outcome	Benchmark Achieved?
Public Housing (1) Employed Full-Time (2) Employed Part-Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other	Public Housing (1) Employed* - 553 (2) Employed* - 0 (3) Enrolled in an Educational Program- 1 (4) Enrolled in Job Training Program – 0 (5) Unemployed - 679 (6) Other	Public Housing (1) Increase by 6 HOH or 1% (2) N/A (3) Increase by 1 HOH or 100% (4) Increase by 1 HOH or 100% (5) Decrease by 7 HOH or 1%	Public Housing 403 N/A 2 0 642	Public Housing No N/A Yes No Yes
*OHA only tracks whether residents are employed, not whether they are employed full-time or part-time. <u>Note:</u> The two residents that are enrolled in an educational program are also employed.				
HCV (1) Employed Full-Time (2) Employed Part-Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other	HCV (1) Employed* - 865 (2) Employed* - 0 (3) Enrolled in an Educational Program– 0 (4) Enrolled in Job Training Program – 0 (5) Unemployed - 1597 (6) Other	HCV (1) Increase by 9 HOH or 1% (2) N/A (3) Increase by 1 HOH or 100% (4) Increase by 1 HOH or 100% (5) Decrease by 16 HOH or 1%	HCV 963 N/A 3 0 1642	HCV Yes N/A Yes No No
* OHA only tracks whether participants are employed, not whether they are employed full-time or part-time. <u>Note:</u> The three residents that are enrolled in an educational program are also employed.				

Public Housing	Public Housing	Public Housing	Public Housing	Public Housing
(1) Employed Full-Time	(1) Employed* – 45%	(1) 46% or 1% of HOHs	39%	No
(2) Employed Part-Time	(2) Employed* – 0%	(2) N/A	N/A	N/A
(3) Enrolled in an Educational Program	(3) Enrolled in an Educational Program – 0%	(3) 1% or 1% of HOHs	0%	No
(4) Enrolled in Job Training Program	(4) Enrolled in Job Training Program – 0%	(4) 1% or 1% of HOHs	0%	No
(5) Unemployed	(5) Unemployed – 55%	(5) 54% or 1% of HOHs	61%	No
(6) Other	(6) Other			
* OHA only tracks whether residents are employed, not whether they are employed full-time or part-time.				
HCV	HCV	HCV	HCV	HCV
(1) Employed Full-Time	(1) Employed* – 35%	(1) 36% or 1% of HOHs	37%	Yes
(2) Employed Part-Time	(2) Employed* – 0%	(2) N/A	N/A	N/A
(3) Enrolled in an Educational Program	(3) Enrolled in an Educational Program – 0%	(3) 1% or 1% of HOHs	0%	No
(4) Enrolled in Job Training Program	(4) Enrolled in Job Training Program – 0%	(4) 1% or 1% of HOHs	0%	No
(5) Unemployed	(5) Unemployed – 65%	(5) 64% or 1% of HOHs	63%	Yes
(6) Other	(6) Other			
* 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)	Public Housing 76*	Public Housing 1% or 1 household decreased	Public Housing 32	Public Housing Yes
	HCV 178	HCV 1% or 2 households decreased	HCV 71	HCV Yes
	*This data is as of 4/7/14. Note this is after the start of FY2015 because the metric was not in OHA's initial plan submission. HUD requested this metric 3/31/14.			

Self Sufficiency

SS # 8: Households Transitioned to Self Sufficiency

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self-sufficiency (increase)	Public Housing 0	Public Housing 1 or 1% increase	Public Housing 2	Public Housing Yes
	HCV 0	HCV 1 or 1% increase	HCV 0	HCV No
	<p><i>Note:</i> OHA realizes that the requirements for the baseline are not conducive to accurately reflecting the progress of this particular metric - transition to self-sufficiency.</p> <p><i>Note:</i> The OHA definition for "self-sufficiency" is to be paying \$225 in TTP monthly OR heads and/or co-heads of households that are employed at least 28 hours a week or 20 hours a week if a full-time student.</p>			

Activity 10: Tenant-Based Voucher Homelessness Prevention Program

Approval & Implementation Year: Activity 10 was first approved in FY2016. The phase 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 FY20 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, 10 participants were able to move to a better unit and/or neighborhood of opportunity in FY20 and 34 participants cumulatively over the life of this activity. The FY20 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 \$36 per month or a total of \$428 for the year. The FY20 outcome is above the benchmark of \$424/month from the baseline of \$0.

For CE#2, tracking employee productivity, the total staff time was 26 hours or 60 minutes per applicant. The FY20 outcome is below the benchmark of 85 minutes per application.

For CE#3, tracking employee productivity, the average error rate in completing a task is 0%. The FY20 outcome meets the benchmark of 0% from the baseline of 0 errors.

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

Benchmarks Achieved: See metrics.

Actual Non-Significant Changes: None.

Actual Changes to Metrics/Data Collection: None.

Actual Significant Changes: None.

Challenges in Achieving Benchmarks and Possible Strategies: None.

Housing Choice

HC # 3: Decrease in Wait List Time

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

Housing Choice

HC # 5: Increase in Resident Mobility

<i>Unit of Measurement</i>	<i>Baseline</i>	<i>Benchmark</i>	<i>Outcome</i>	<i>Benchmark Achieved?</i>
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	<u>Public Housing</u> N/A <u>HCV</u> 0	<u>Public Housing</u> N/A <u>HCV</u> 2	<u>Public Housing</u> N/A <u>HCV</u> 10	<u>Public Housing</u> N/A <u>HCV</u> Yes

Cost Effectiveness

CE # 1: Agency Cost Savings

<i>Unit of Measurement</i>	<i>Baseline</i>	<i>Benchmark</i>	<i>Outcome</i>	<i>Benchmark Achieved?</i>
Total cost of task in dollars (decrease)	<u>Public Housing</u> N/A <u>HCV</u> \$0	<u>Public Housing</u> N/A <u>HCV</u> \$424/month	<u>Public Housing</u> N/A <u>HCV</u> \$428/year or \$36/month	<u>Public Housing</u> N/A <u>HCV</u> No

Cost Effectiveness

CE # 2: Staff Time Savings

<i>Unit of Measurement</i>	<i>Baseline</i>	<i>Benchmark</i>	<i>Outcome</i>	<i>Benchmark Achieved?</i>
Total time to complete the task in staff hours (decrease).	<u>Public Housing</u> N/A <u>HCV</u> 90 minutes	<u>Public Housing</u> N/A <u>HCV</u> Decrease by 5% or 85 minutes	<u>Public Housing</u> N/A <u>HCV</u> 60 minutes	<u>Public Housing</u> N/A <u>HCV</u> Yes

Cost Effectiveness

CE # 3: Decrease in Error Rate of Task Execution

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

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 HCV Project-Based Homeownership Program, over a ten (10) year period, with up to 82 homeownership units to be developed at Carver Park.

The OHA has partnered with the City of Orlando and other stakeholders to construct 82 homes at Carver Park. The site will be mixed-income: a number of homes sold will be affordable and a number of homes will be sold at market rate. OHA will provide monthly homeownership assistance to some or all of the affordable buyers. Below is the chart detailing the proposed plan.

Actions Taken Towards Implementation: The Orlando Housing Authority continues to work with the City of Orlando Community Redevelopment Authority (CRA) to develop forty-one units on the eastern portion of the Carver Park HOPE VI site (east of Westmoreland Avenue). OHA plans to build-out the western portion of the site (41 units) as rental and for-sale housing, subject to housing market conditions. Project-based vouchers may be part of the financing strategy to make for-sale homes affordable for low-moderate income purchasers.

Activity 13: Streamlined Public Housing Inspections

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

Description: The OHA is streamlining inspections by conducting Uniform Physical Conditions Standards (UPSC) public housing unit inspections, by tenant, every three years (triennial) in tandem with triennial recertifications. Triennial inspections are replacing annual inspections, and the OHA is providing strategic preventive maintenance at all properties throughout the year. Randomly selected units are chosen, from the 2/3 of public housing populace that will not receive the triennial inspection that fiscal year, for inspection. Those inspections include building exterior/systems and common areas at all public housing properties. When tenants move out, the OHA conducts inspections on those units, and when a tenant requests an inspection before his/her triennial inspection, the OHA performs the inspection. Lastly, the OHA continues 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 are randomly selected for inspection every year.

Actions Taken Towards Implementation: None.

B. On Hold

No activities.

C. Closed Out Activities

No activities.

SECTION V

SOURCES AND USES OF FUNDS

SECTION V: SOURCES AND USES OF FUNDS

A. Sources and Uses of Funds

Actual Sources and Uses of MTW Funding for the Fiscal Year

The OHA submitted their unaudited information in FDS through the Financial Assessment System – PHA (FASPHA) on June 15, 2020.

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 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. This activity has been modified from a \$225 rent floor to a \$225 minimum rent for households that are not elderly and not disabled. The implementation of the minimum rent now includes a referral to the MTW Resource Center for non-elderly and non-disabled heads or co-heads of households that are not employed by April 1, 2020, not employed the minimum number of hours (28 hrs/wk or 20 hrs/wk if full-time student), or experiencing an employment related hardship.

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 childcare 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) to bring employability workshops to the Ivey Lane Homes site using its mobile unit.

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 reasons, 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



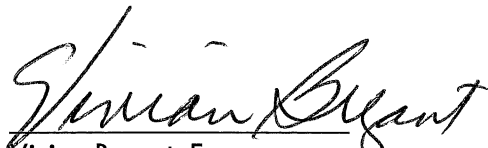
ORLANDO HOUSING AUTHORITY

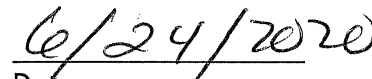
MOVING TO WORK (MTW) (APRIL 1, 2019 TO MARCH 31, 2020)

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.