

HOUSING AUTHORITY OF THE COUNTY OF SAN MATEO

MOVING TO WORK ANNUAL REPORT FY2017



**San Mateo County Board of Supervisors
(Sitting as the Board of Commissioners for the Housing Authority)**

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SECTION I

Introduction

Overview of the Housing Authority of the County of San Mateo's ongoing MTW goals and objectives

The San Mateo County (SMC) Department of Housing serves as a catalyst for increasing access to affordable rental housing, increasing the supply of workforce housing, and supporting related community development so that housing exists for people of all income levels in San Mateo County. This is the mission statement for the Agency, providing the framework which undergirds the Housing Authority of the County of San Mateo (HACSM) commitment to affordable housing choices for families, the continual expansion and promotion of economic self-sufficiency of program participants, and the on-going development of new ways to be even more administratively efficient. HACSM has now completed its 17th year in the MTW program. With the lessons learned and the success realized as an agency and even more importantly as evidenced in the growth and positive changes for the households we serve, these three goals remain firmly embedded as essential characteristics of each strategy proposed, policy decision made, and program operationalized and implemented.

Since HACSM received HUD approval to expand MTW authority from a small carve out of targeted vouchers to its entire HCV portfolio, HACSM has reduced administrative costs, collaborated with other County of San Mateo Departments and organizations to address the goal of ending homelessness in the local community, expanded and sharpened its focus on activities that increase the potential self-sufficiency of current participants and optimized the overall effectiveness of the agency.

Through collaboration with a broad range of community stakeholders, made possible through the flexibilities of the MTW program, HACSM has been a leader in taking bold steps in support of San Mateo County residents through program innovation and responsiveness. This year, in addition to the MTW program, HACSM actively participated with the San Mateo County Continuum of Care and the Center on Homelessness to address and implement a program re-design for the Permanent Supportive Housing programs. HACSM has also continued to participate with other SMC Departments that provide direct services to the community, including the SMC Health System, the Human Services Agency, the Probation Department, and others, to develop a collaborative (non-siloed) approach to the housing needs of low-income individuals who receive services in the various SMC systems.

As you will see in the updates throughout this annual report, FY2017 has continued to be a challenging year for affordable housing in San Mateo County,

but we have also made great strides to combat the current housing climate. In collaboration with the SMC Housing and Community Development Division, significant gains have been realized in the development, pre-development, and construction of new affordable housing in San Mateo County. Through the use of MTW Activity 2012-26: Affordable Housing Fund, HACSM has been able to support this effort in new housing development and at the same time seen these funds leveraged with other State of California and other local sources to further expand this effort.

While the news reports continue to showcase the bleak on-going housing crisis in the San Francisco Bay Area, with San Mateo County solidly positioned at the heart of this crisis, the MTW program has provided HACSM with the crucial flexibility to continue its effort to support the affordable housing efforts for the low-income households in our jurisdiction. This positioning, coupled with the collaboration with other County Departments and community based organizations, has provided new pathways to efficiently work together to end homelessness and significantly reduce the terrors of potential homelessness for low-income families.

Over the past few years, as the San Mateo County housing crisis has rapidly progressed, HACSM has been refining the MTW activity titled the “Leasing Success Program.” (See MTW Activity 2015-35). This multi-faceted activity was designed to address the critical challenges facing voucher holders in the open market. Through an extensive RFP process, HACSM selected Abode Housing Services (Abode) to assist new and relocating MTW voucher holders to find and secure appropriate rental units beginning in February 2016. The design and desire of HACSM in establishing the three-year contract with Abode was to empower Abode with the authority to act as a type of “broker” with owners of rental property in San Mateo County, thus removing some of the historical challenges related to the traditional Section 8 program. Through the collaboration, Abode actively markets and promotes participation in the program to rental property owners, assists to streamline the lease-up process, and is available post move-in to ensure that all parties (participant and landlord) are satisfied. Clients have stated their appreciation for this partnership with Abode because it has helped them to bridge the gap between them and their prospective landlord. In practice, as Abode actively advocates for each client, they not only to shed some light on the MTW program, but to also set the foundation for what will hopefully become a very positive and rewarding relationship for both parties. Another aspect of this MTW Activity is the “Landlord Incentive Program.” The Landlord Incentive Program appeals to both new and continuing landlords by addressing some common concerns, as it includes three different bonuses to incentivize owner participation: 1) New Landlord Bonus of \$1,000 for a “new” owner, who has not rented a unit with the program in the past 36 months, 2) The Landlord Continuity Bonus, a pro-ration of up to one month of the previous full contract rent if they re-rent to another voucher holder when a unit “turns over,” and 3) The “No Loss” Bonus, designed to mitigate the perception of “red-tape” and extended timelines to complete the lease up process. Since the inception of this MTW Activity in FY2015, the Housing Authority has been able to recruit 110 new landlords and retain over 180 landlords. One such landlord recently stated, “Wow, that makes a big difference” in the initial stages of the program.

Following are examples from FY2017 that further demonstrate the HACSM continued commitments to increasing affordable housing choice, supporting the increased self-sufficiency goals of program participants, and developing administrative efficiencies:

Increasing Affordable Housing Choices

In FY17, HACSM continued its efforts to increase the supply of affordable housing in SMC, awarding new contracts with affordable housing developers to support construction of new long-term affordable units for low-income families. Due to the extremely challenging housing market, this strategy has been essential to the preservation of any affordable housing in the community. During FY17 the San Mateo County Board of Supervisors and County Manager again named housing as one of, if not the biggest critical need in the County. The Housing Authority, along with the Housing & Community Development Division, has been a key stakeholder in developing creative solutions by making new construction of affordable housing a reality through the use of HAP reserves (Affordable Housing Funds) and the County's Measure A funds as seed money, as well as awarding HCV Project-based Vouchers to help developers in financing their projects.

The Housing Authority, Housing & Community Development division, and the local municipalities in San Mateo County also continued the collaboration in the development of the plan to address the “affirmatively furthering fair housing “ (AFFH) revised guidelines and requirements which began in FY16. During FY17, the San Mateo County Regional AFFH's community participation process resulted in meaningful engagement of more than 4,000 residents and stakeholders representing local organizations and coalitions. The regional AFFH engagement methods included opportunities for residents and opportunities for stakeholders to participate in the development of the AFFH plan. Resident opportunities included: 1) Resident survey, available in online and postage-paid printed formats, where residents could take the survey in English, Spanish, Chinese and Tagalog. 2) Resident focus groups, of which there were four — one in Spanish; one with Filipino residents; a group with Section 8 voucher holders, including Moving to Work participants; and a focus group with residents with disabilities. 3) Open house community meetings. 4) A Public hearing, July 25, 2017, prior to the release of the draft AFH on August 1, 2017, San Mateo County, as the lead jurisdiction, held a public hearing before the Board of County Supervisors that included a detailed presentation of the AFH process, results, fair housing issues identified, contributing factors and draft goals. The AFFH plan is now in its final stages and targets completion and submission to HUD in late 2017.

Another method by which the Housing Authority has been supporting the effort to increase housing choice is through the preservation and development of new construction affordable rental units. Two of the new construction projects that were completed in FY17 added 308 new units of long-term affordability in the San Mateo County housing inventory. Of the 308 new affordable units, 159 included Project-Based subsidy assistance. Following on the next page are pictures and a short description of two of the projects.

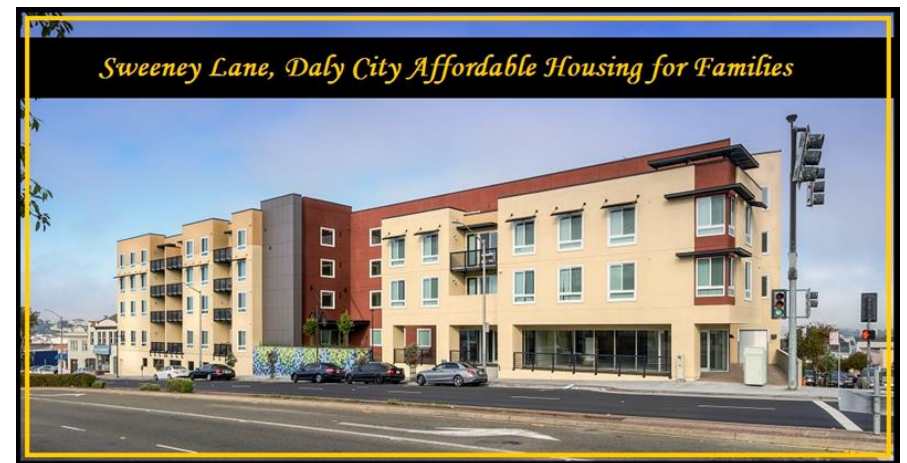
Sequoia Belle Haven – Menlo Park, CA

Sequoia Belle Haven, located on Willow Road in Menlo Park, provides 90 one/two bedroom units for seniors. HACSM entered into a long term, PBV HAP contract for 69 units. The property was fully leased up in the Spring of 2017.



Sweeney Lane – Located on 6800 Mission Street in Daly City

Sweeney Lane provides 52 units for low income families with incomes up to 60% of the Area Median Income. HACSM entered into a long term PBV HAP contract for 26 units. The property began the lease up process in June 2017.



Promoting Self-Sufficiency

The promotion of participant's increased economic self-sufficiency is one of the three primary goals of the MTW program. In addition to the actual "Self-Sufficiency" program itself, HACSM has implemented several activities that explicitly support the goal of increasing the self-sufficiency and self-determination in decision making for program participants. In FY17, HACSM continued to host Renting Success Workshops, conceived and designed by the Family Self-Sufficiency Team, to help new voucher holders understand and personally address the significant barriers they could face in their housing search. While this activity didn't require MTW authority, the Self-Sufficiency Team saw this as a way in which they could support the "first steps" the households would need to take while being a participant in the program. At the workshop, the Self-Sufficiency team assist the new participants in learning how to search for housing, how to prioritize their family needs (ie: close to schools, medical centers, transportation), understand their monthly rent portion, how to best present themselves to prospective landlords, and how to talk about their personal situation or potential barriers, such as a low credit score, or past eviction, anything that could potentially "dis-qualify" their rental application. In the workshop clients learn to reframe their approach by focusing on the things that they are proud of and to "sell" themselves in a way that shows the constructive steps they have already taken. One aspect that has grown out of the workshop and proven to be an effective tool is an individual family's "renting resume." Again, while this workshop is not a MTW activity, the administrative time and cost savings realized from the MTW program has allowed HACSM to develop and present these types of activities for program participants.

In FY2017, over 95% of the families who joined the program via the MTW wait list now have a goal plan and are meeting with HACSM staff at least once every three months through office visits, phone calls, email check in's and more. The increased frequency of meeting with families has helped HACSM staff to directly work with families to stay on track with their short and long-term goals including increasing their income potential through education and employment advancement, personal growth and increased financial knowledge. HACSM has expanded the self-sufficiency program to include a provision of monetary rewards for participants who complete educational goals as well as increase their credit scores and savings, all of which are fundamental steps for someone striving to be self-sufficient.

Developing Administrative Efficiencies

As previously reported, since 2008, HACSM has re-designed the processes for both initial and on-going eligibility determinations, easing the burden on both participants and Housing Authority staff and increasing the timeliness of the process. As a result of the success of the biennial recertification schedule for all elderly and/or disabled households, HACSM expanded the timeline to once every three years for elderly and/or disabled families further easing the burden and stress for the families and providing administrative relief for HACSM. HACSM continues to conduct interim recertifications for these households if needed. HACSM is also in its eighth year of its rent-reform program known as the TST (Tiered Subsidy Table) which created a system that was extremely simple for the end user (HACSM staff and program participants) and that provides participants with the maximum amount of subsidy that Housing Authority will contribute to their rent on a monthly basis.

HACSM's long-term vision for the direction and duration of its MTW program

MTW flexibility has given HACSM the ability to combine resources, through the fungibility of the MTW block grant and thus removed significant financial barriers, allowing HACSM the freedom to better address San Mateo County program priorities and the community needs. The following are focus areas that HACSM has identified and that continue to support this vision:

Serve More Families

In FY13, HACSM researched and developed a strategic plan for using its voucher resources in ways that meet specific goals through 2018. Three broad goal areas were developed: serving residents most in need, facilitating residents' self-sufficiency, and building sustainable system capacity. Specifically, the plan called for increasing the creation of new affordable units using project-based vouchers, increasing the Provider-Based Assistance (PBA) partners, and the expansion of the five-year self-sufficiency program. As discussed throughout this Annual Report, HACSM has continued to take active steps toward the attainment of each of these strategic goals in FY17.

In FY17, HACSM continued the expansion of its five-year, MTW Self-Sufficiency program. In FY17, all new applicants from the waiting list joined the Self-Sufficiency program. These new program participants have access to greatly expanded and enriched case management services and to at least quarterly connections with their HACSM Self-Sufficiency Coordinators. As discussed in detail in this Report, the initiative also includes a comprehensive hardship policy for elderly and/or disabled persons as well as for self-sufficiency participants who need some additional time to achieve their goals.

Expand Affordable Housing Partnerships and Project-Based Programs

HACSM has continued to actively use its MTW flexibility to assist in the development of new or rehabilitated affordable housing by strategically project-basing HCV vouchers as a key financial component. Project-Based Vouchers' (PBV) contractual obligation for long-term unit availability is also important in our perennially tight housing market.

Expand Community Partnerships and Commitments with Support Service Providers

On an ongoing basis, HACSM reviews the needs of new program participants in the Self-Sufficiency program and as a result of this analysis has conscientiously expanded the program partnerships with a variety of educational institutions, work force development providers, and county and community health and social service providers. HACSM has an active Program Coordinating Committee that meets on a quarterly basis to further support leveraging of services on behalf of low-income families in our programs.



In October 2016, HACSM hosted its 4th Annual Housing & Resource Expo for all MTW Self-Sufficiency participants, VASH participants, Foster Youth, formerly homeless individuals and families who participate in the Housing Readiness program, and residents of HACSM-owned properties. The EXPO was a great success, linking over 70 vendors from community partners ranging from San Mateo Credit Union, Peninsula Works, JobTrain, Wells Fargo, ReMax, CivicCorps, Voter Registration, to the Employment Development Department, and CA University Nutrition program. Over 100 households attended and received information on services, gained linkages with organizations to assist with training, resume writing, interviewing skills and employment opportunities.

Provider Based Assistance Programs (PBA)

In 2011, HACSM used its “block-grant” funding status to create a new rental subsidy program, otherwise known as Provider-Based Assistance (PBA). Using an RFP process, HACSM originally awarded three contracts for up to three years. Each provider serves a typically underserved population in the HCV program. The first award was given to Community Overcoming Relationship Abuse (CORA), the organization in San Mateo County that serves survivors of domestic violence (15 units). The second award was given to Service League of San Mateo County that serves persons re-entering society after a period of incarceration and who are receiving addiction treatment and other supportive services. The third award was implemented in 2013, with a signed agreement with Human Investment Project (HIP) Housing for their shared housing self-sufficiency program. In FY17, HACSM awarded a fourth contract to Brilliant Corners. The program is designed to assist individuals who are exiting a health care setting but are in need of on-going support services. This contract was prepared and ready to be executed in early FY18.

In FY17 all three of the original PBA providers continue to have full and active programs, meeting the specific needs of their participants including their needs for both affordable housing and supportive services. See MTW Activity 2011-27 for additional information on this important activity.

Following are two success stories. The first is from Service League, submitted to us in one of their quarterly reports and the second is from CORA shared with the Housing Authority in FY17. As you will see, both examples clearly demonstrate the profound difference the PBA program has made in the lives of the participants in this unique program.

Nate* entered the Service League of San Mateo County's transitional housing program as (as he says), "a young man with big dreams." He had nowhere to live, and his addiction had alienated him from his family and they told him that he couldn't live with anyone while he was unhealthy and getting into trouble. His probation officer (P.O.) told him he had to live in a clean and safe environment, but he didn't know any friends who fit that criteria and so he had nowhere to go. Thanks to his P.O.'s connection to the Service League, Nate was able to get an interview with a case manager and find a housing opportunity that would allow him to learn how to be a clean and productive member of society again. He really wanted to show his mom that she could be proud of him.

Having attempted college in the past, he desired to return and obtain his degree. Nate always kept that goal a priority in sight. He continued working on his recovery, attending 12-step recovery meetings. He was successful in balancing participation in his probation outpatient program and the Hope House Transitional Program.

Towards his completion of the probation outpatient program, Nate was finally able to make moves towards his collegiate career. He met with a college counselor, evaluated his transcripts, and enrolled himself into school. But the time of his successful outpatient program completion, Nate had independently set himself up to start classes. He was able to complete his Associates in Science (AS) degree while going through the program, which allowed him to apply for a transfer to a 4-year college. He didn't feel pressured to earn a lot of money right away, as his rent was affordable, so he was ready to concentrate on getting his life back together.

**Not his real name.*

Mary* (a woman of Korean descent) came to CORA through the Safe House system, fleeing a dangerously abusive husband with her 12 year-old daughter. Mary was immediately enrolled into CORA's mental health program with a Korean-speaking therapist. Mary struggled at first while at the Safe House as housing was not available and her language limitations increased her barriers for securing housing. Additionally, Mary and her daughter were suffering from high levels of trauma and Mary found it difficult to manage the stress of applying to numerous housing programs. The Safe House advocates linked Mary with CORA's PBA Family Advocate, and Mary was offered trauma-informed housing assessment and made to feel safe throughout the process of applying for PBA.

Mary was finally accepted into CORA's PBA program and has continued therapy both for herself and her daughter. She has received court accompaniment from both her therapist and PBA Family Advocate and recently had a successful

outcome in court, allowing her to become more financially secure and self-sufficient. Mary was able to continue working and her daughter is excelling in school and plays the flute. Mary will continue to receive case management support through PBA, therapy for herself and her child, advocacy and translation services as needed, and attend the weekly self-sufficiency workshops offered through the PBA program.

*Please note: Names have been changed to protect the confidentiality of the clients.

SECTION II

General Housing Authority Operating Information

Housing Stock Information

New Housing Choice Vouchers that were Project-Based During the Fiscal Year			
Property Name	Anticipated Number of New Vouchers to be Project-Based *	Actual Number of New Vouchers that were Project-Based	Description of Project
Ocean View Senior Apartments	31	31	The Ocean View Senior Apartments is an existing 100-unit affordable apartment building located in Pacifica, CA. The residential property serves low-income seniors and has 100 one-bedroom units. The property will undergo major upgrades to the building systems and building improvements.
Alma Point Foster Square Affordable Senior Housing	33	33	Alma Point is a 66-unit affordable new construction senior development located in Foster City, CA. 33 units will be covered by project-based vouchers serving low-income senior households. Construction was completed in June 2016.
Sweeney Lane Apartments (formerly known as Mission Street Family Housing)	26	26	Mission Street Family Housing consists of 52-unit affordable multi-family new construction development located in Daly City, CA. 26 units are covered by project-based vouchers serving low-income families.
Sequoia Belle Haven	n/a	69	Sequoia Belle Haven is part of the bigger Gateway (formerly a Moderate Rehab project) redevelopment located in Menlo Park, CA. When complete, the project will greatly increase the number of affordable housing units. Sequoia Belle Haven, first phase of the redevelopment, consists of 90 newly constructed units. With the exception of the manager unit, all 89 units will serve low-income senior households. 69 units are covered by project-based vouchers. Construction was completed in spring 2017.
University Avenue	40	40	University Avenue is a 41-unit affordable new construction senior development located in E. Palo Alto, CA. With the exception of the manager unit, all units are covered by project-based vouchers serving low-income senior households. Construction was completed in spring 2017.

Anticipated Total Number of New Vouchers to be Project-Based *	Actual Total Number of New Vouchers that were Project-Based	Anticipated Total Number of Project-Based Vouchers Committed at the End of the Fiscal Year *	Anticipated Total Number of Project-Based Vouchers Leased Up or Issued to a Potential Tenant at the End of the Fiscal Year *
199	199	0	199
		Actual Total Number of Project-Based Vouchers Committed at the End of the Fiscal Year	Actual Total Number of Project-Based Vouchers Leased Up or Issued to a Potential Tenant at the End of the Fiscal Year
		0	199

* From the Plan

Other Changes to the Housing Stock that Occurred During the Fiscal Year
n/a
n/a
n/a

Examples of the types of other changes can include but are not limited to units that are held off-line due to the relocation of residents, units that are off-line due to substantial rehabilitation and potential plans for acquiring units.

General Description of Actual Capital Fund Expenditures During the Plan Year

The HACSM Capital Fund grant is generated by a very small Public Housing inventory. For FY17, HACSM received \$16,087 in Operating Subsidy and \$30,473 in Capital Funds for El Camino Village (Development #CA014000004). Additionally, we received \$231,392 for RHF Capital Funds (Midway Village) which we disbursed to El Camino Village under MTW fungibility. These funds were used for the ongoing maintenance of the property.

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

Housing Program *	Total Units	Overview of the Program
n/a	0	n/a
n/a	0	n/a
n/a	0	n/a
Total Other Housing Owned and/or Managed	0	

* Select Housing Program from: Tax-Credit, State Funded, Locally Funded, Market-Rate, Non-MTW HUD Funded, Managing Developments for other non-MTW Public Housing Authorities, or Other.

If Other, please describe:

n/a

Leasing Information

Actual Number of Households Served at the End of the Fiscal Year		
Housing Program:	Number of Households Served* Planned	Actual
Number of Units that were Occupied/Leased through Local Non-Traditional MTW Funded Property-Based Assistance Programs **	22	54
Number of Units that were Occupied/Leased through Local Non-Traditional MTW Funded Tenant-Based Assistance Programs **	14	17
Port-In Vouchers (not absorbed)	0	0
Total Projected and Actual Households Served	36	71
* Calculated by dividing the planned/actual number of unit months occupied/leased by 12.		
** In instances when a Local, Non-Traditional program provides a certain subsidy level but does not specify a number of units/Households Served, the PHA should estimate the number of Households served.		
Housing Program:	Unit Months Occupied/Leased**** Planned	Actual
Number of Units that were Occupied/Leased through Local Non-Traditional MTW Funded Property-Based Assistance Programs ***	264	648
Number of Units that were Occupied/Leased through Local Non-Traditional MTW Funded Tenant-Based Assistance Programs ***	168	204
Port-In Vouchers (not absorbed)	0	0
Total Projected and Annual Unit Months Occupied/Leased	432	852
n/a		
*** In instances when a local, non-traditional program provides a certain subsidy level but does not specify a number of units/Households Served, the PHA should estimate the number of households served.		
**** Unit Months Occupied/Leased is the total number of months the housing PHA has occupied/leased units, according to unit category during the year.		

	Average Number of Households Served Per Month	Total Number of Households Served During the Year
Households Served through Local Non-Traditional Services Only	0	0

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

HUD will verify compliance with the statutory objective of “assuring that at least 75 percent of the families assisted by the Agency are very low-income families” is being achieved by examining public housing and Housing Choice Voucher family characteristics as submitted into the PIC or its successor system utilizing current resident data at the end of the agency's fiscal year. The PHA will provide information on local, non-traditional families provided with housing assistance at the end of the PHA fiscal year, not reported in PIC or its successor system, in the following format:

Fiscal Year:	2011	2012	2013	2014	2015	2016	2017	2018
Total Number of Local, Non-Traditional MTW Households Assisted	X	X	x	50	50	76	71	X
Number of Local, Non-Traditional MTW Households with Incomes Below 50% of Area Median Income	X	X	x	50	50	76	71	X
Percentage of Local, Non-Traditional MTW Households with Incomes Below 50% of Area Median Income	X	X	x	100%	100%	100%	100%	X

Reporting Compliance with Statutory MTW Requirements: Maintain Comparable Mix

In order to demonstrate that the statutory objective of “maintaining a comparable mix of families (by family size) are served, as would have been provided had the amounts not been used under the demonstration” is being achieved, the PHA will provide information in the following formats:

Baseline for the Mix of Family Sizes Served

Family Size:	Occupied Number of Public Housing units by Household Size when PHA Entered MTW	Utilized Number of Section 8 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 Percentages of Family Sizes to be Maintained
1 Person	X	1471	0	1471	38.00%
2 Person	X	1041	0	1041	27.00%
3 Person	X	570	0	570	15.00%
4 Person	X	434	0	434	11.00%
5 Person	X	201	0	201	5.00%
6+ Person	X	148	0	148	4.00%
Totals	0	3865	0	3865	100.00%

Explanation for Baseline Adjustments to the Distribution of Household Sizes Utilized

The baseline number represents all HCV households served in May 2010, when HACSM expanded the MTW activities to all HCV households.

Mix of Family Sizes Served							
	1 Person	2 Person	3 Person	4 Person	5 Person	6+ Person	Totals
Baseline Percentages of Household Sizes to be Maintained **	38%	27%	15%	11%	5%	4%	1
Number of Households Served by Family Size this Fiscal Year ***	2448	1516	620	519	286	191	5580
Percentages of Households Served by Household Size this Fiscal Year ****	44%	27%	11%	9%	5%	3%	1
Percentage Change	6%	0%	-4%	-2%	0%	-1%	0%

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

Changes in household size were due to changes in household composition of the existing families, and the make up of the new families admitted to the program. This is a natural occurrence as HACSM does not target applicants based on family size.

* "Non-MTW adjustments to the distribution of family sizes" are defined as factors that are outside the control of the PHA. Acceptable "non-MTW adjustments" include, but are not limited to, demographic changes in the community's population. If the PHA includes non-MTW adjustments, HUD expects the explanations of the factors to be thorough and to include information substantiating the numbers used.

** The numbers in this row will be the same numbers in the chart above listed under the column "Baseline percentages of family sizes to be maintained."

*** The methodology used to obtain these figures will be the same methodology used to determine the "Occupied number of Public Housing units by family size when PHA entered MTW" and "Utilized number of Section 8 Vouchers by family size when PHA entered MTW" in the table immediately above.

**** The "Percentages of families served by family size this fiscal year" will reflect adjustments to the mix of families served that are directly due to decisions the PHA has made. HUD expects that in the course of the demonstration, PHAs will make decisions that may alter the number of families served.

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

Housing Program

Housing Choice Vouchers

n/a

n/a

Description of Leasing Issues and Solutions

During the reporting period, San Mateo county continues to experience extremely tight rental market and outrageously high unit rents. One of the challenges is that voucher holders are having to compete with high paid technology and biotech workers for the same limited market. To address this situation, HACSM has increased its project based vouchers to secure long term affordability, has collaborated with affordable housing developers, and private market landlords. In December 2015, HACSM increased the subsidy amounts to all bedroom sizes for voucher holders and in early 2016, finalized the negotiations with an organization, Abode Services, that assists referred applicants and participant in thier housing serach.

n/a

n/a

Number of Households Transitioned To Self-Sufficiency by Fiscal Year End		
Activity Name/#	Number of Households Transitioned *	Agency Definition of Self Sufficiency
MTW Self Sufficiency Program/Activity #2000-1	27	Household reached the end of their voucher term, and/or reached an income level that HACSM paid \$0 subsidy for a maximum period of 90 days.
Housing Readiness Program/Activity #2009-2	1	Household reached the end of their voucher term, and/or reached an income level that HACSM paid \$0 subsidy for a maximum period of 90 days.
Tiered Subsidy Table/Activity #2010-9	19	The household reached an income level such that HACSM paid \$0 subsidy for a maximum period of 90 days.
n/a	n/a	n/a
Households Duplicated Across Activities/Definitions	0	* The number provided here should match the outcome reported where metric SS #8 is used.
ANNUAL TOTAL NUMBER OF HOUSEHOLDS TRANSITIONED TO SELF SUFFICIENCY	47	

Wait List Information

Wait List Information at Fiscal Year End				
Housing Program(s) *	Wait List Type **	Number of Households on Wait List	Wait List Open, Partially Open or Closed ***	Was the Wait List Opened During the Fiscal Year
Federal MTW Housing Choice Voucher Program	Community-Wide	6823	Open	Yes
Federal MTW Housing Choice Voucher Program (Project-Based, 636 El Camino)	Site Based	584	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Alma Point)	Site Based	579	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Coastside Senior Housing)	Site Based	133	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Delaware Place)	Site Based	1771	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Delaware Pacific)	Site Based	1812	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Edgewater Isle)	Site Based	754	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Hillside Terrace)	Site Based	1,872	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Half Moon Village)	Site Based	1040	Closed	No

Wait List Information at Fiscal Year End

Federal MTW Housing Choice Voucher Program (Project-Based, Magnolia Plaza)	Site Based	592	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Midway Village)	Site Based	1293	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Newell)	Site Based	707	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Oceanview)	Site Based	33	Closed	Yes
Federal MTW Housing Choice Voucher Program (Project-Based, Pacific Oaks)	Site Based	675	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Redwood Oaks)	Site Based	1222	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Sequoia Belle Haven)	Site Based	544	Closed	Yes
Federal MTW Housing Choice Voucher Program (Project-Based, St. Matthew)	Site Based	1236	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Sweeney Lane)	Site Based	1822	Closed	Yes

Wait List Information at Fiscal Year End

Federal MTW Housing Choice Voucher Program (Project-Based, Willow Terrace)	Site Based	1174	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, The Woodlands)	Site Based	1147	Closed	No
Federal MTW Public Housing Units	Site Based	1817	Closed	No

More can be added if needed.

* *Select Housing Program:* Federal MTW Public Housing Units; Federal MTW Housing Choice Voucher Program; Federal non-MTW Housing Choice Voucher Units; Tenant-Based Local, Non-Traditional MTW Housing Assistance Program; Project-Based Local, Non-Traditional MTW Housing Assistance Program; and Combined Tenant-Based and Project-Based Local, Non-Traditional MTW Housing Assistance Program.

** *Select Wait List Types:* Community-Wide, Site-Based, Merged (Combined Public Housing or Voucher Wait List), Program Specific (Limited by HUD or Local PHA Rules to Certain Categories of Households which are Described in the Rules for Program Participation), None (If the Program is a New Wait List, Not an Existing Wait List), or Other (Please Provide a Brief Description of this Wait List Type).

*** For Partially Open Wait Lists, provide a description of the populations for which the waiting list is open.

n/a
n/a
n/a

If Local, Non-Traditional Program, please describe:

n/a
n/a
n/a

If Other Wait List Type, please describe:

n/a
n/a
n/a

If there are any changes to the organizational structure of the wait list or policy changes regarding the wait list, provide a narrative detailing these changes.

n/a

SECTION III

Proposed MTW Activities: HUD approval requested

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

SECTION IV

Approved MTW Activities: HUD approval previously granted

Implemented Activities

Activity #2000-1: MTW Self-Sufficiency Program

Approved by HUD: FYE2000

Implemented by HACSM: 5/1/2000

Description of the activity

The HACSM MTW program, first implemented in May 2000, was originally developed to respond to welfare reform and thus was fashioned to focus almost exclusively on improving families' self-sufficiency in preparation for the conclusion of their welfare assistance. The core design of HACSM's original MTW program consisted of limiting Housing Choice Voucher assistance to a maximum of six years, while at the same time offering self-sufficiency services to those participants. In FY10 HACSM changed the voucher term to a maximum of five years. Through December 2013, in order to reach the target population, HACSM only accepted new admissions through a referral process. The referring agencies included the SMC county welfare and social service departments, a drug treatment facility, and/or local homeless shelters. In addition to referring eligible families for admission to the MTW program, these same referring agencies signed agreements with HACSM to provide appropriate case management services to the family throughout the term of their subsidized housing assistance.

In FY2014, upon HUD approval, HACSM implemented several revisions to this activity, including the following: 1) January 2014, HACSM opened its HCV waitlist and with this opening began the enrollment of all new households in the MTW Self-Sufficiency program, 2) All new program participants from the HACSM waiting list are automatically enrolled in the MTW Self-Sufficiency program, thus eliminating the direct referral process and 3) HACSM expanded the number of vouchers allocated to the 5-year time limited program from 300 up to 800 vouchers.

All MTW Self-Sufficiency participants are required to participate in the HACSM Family Self-Sufficiency (FSS) program, which requires families to be gainfully employed and free of welfare assistance 12 months prior to the end of the FSS contract. Non-compliance with the FSS contract is cause for termination of housing assistance. HACSM collaborates with county and non-profit service providers to prepare MTW households to be economically self-sufficient upon graduation. With the flexibility afforded through the MTW program, HACSM designed a local method by which escrow is calculated for the FSS program participants at the time of graduation. In FY14, due to the fact that this MTW Activity #2000-4 (Escrow Accounts) was so integrally related to the self-sufficiency goals of program participants, HACSM combined these two activities under Activity #2000-1 for reporting purposes.

The HACSM escrow calculation method considers several activities that support a family's increasing self-sufficiency, which are often necessary for an individual to be job-ready and positioned for higher paying positions, instead of only recognizing increases in earned income. The maximum escrow credit and pay out at graduation is \$3,500 per family. Because escrows are only calculated and credited at the end of the FSS Contract term, interim withdrawals were eliminated.

The HACSM-designed calculation methodology is as follows:

- *Employment*: In order to qualify, at program exit, the family must achieve either: 1. The lesser of \$1,500 or a 15% increase over the above stated Earned Income baseline if the baseline amount is more than \$2000, or 2. A \$10,000 increase over the above stated Earned Income baseline if the baseline amount is \$2000, or less. HACSM will calculate escrow based on a dollar for dollar match up to \$1,000. (\$1,000 maximum per family under this category)
- *Education/Vocational Degree Attainment*: \$500 for each completed education/vocational goal. (\$1,000 maximum per family under this category)
- *Personal Enrichment/Job Preparation*: \$25 for each workshop, skill improvement training completed. (\$250 maximum per family under this category)
- *Path to Citizenship*: \$250 for each goal completed per family member in this process. (\$500 maximum per family under this category)
- *Budgeting/Saving Series*:
 - Attend a HACSM-sponsored budgeting class within the first six months of program entry. (\$25)
 - Prepare and submit to HACSM a personal budget for six months following the budgeting class. (\$100)
 - Establish (open) a new savings account within the first year of program entry or a secured credit card to re-establish credit. Once credit has been established, open a savings account. (\$25)
 - Establish a pattern of savings by: a. Increase savings balance over the savings baseline by at least \$1500, AND b. During the final 12 months of participation, make a minimum of 10 monthly deposits of at least \$25, AND c. Any monthly withdrawals may not cause the deposit amount to be less than \$25. (\$400)
Note: Retirement accounts will not be considered as savings accounts.
(\$500 maximum per family under this category)
- *Improve Credit Score*: \$1 for each credit score point improved over the Credit Score baseline. (\$250 maximum per family under this category)

- *Personal Participant Pay Point from Individual Training and Service Plan (ITSP)*. Qualifying goals include: Transportation, child care, fulfilling student loan obligations, expunging criminal records, completing the full LENA program and resolving outstanding child support payments. \$250 for each Personal Participant goal completed.(\$500 maximum per family under this category)

Since this activity's original implementation, portability was generally not approved, due to the five-year time limit and HACSM's inability to enforce other PHAs compliance with this unique aspect of the HACSM approved activity. However, in FY15 due to households joining the program via the wait list, under the hardship policy, HACSM will consider a received request based on the following conditions: 1) Approved reasonable accommodation, 2) Participation, as a full time student, in a training program that is more than 35 miles from the nearest San Mateo County boarder, or 3) Full Time employment that is more than 35 miles from the nearest San Mateo County boarder. (See Appendix I for the full hardship policy)

Impact of the activity

In FY17, HACSM enrolled 167 new families from the MTW Wait List to the Self-Sufficiency program and 27 families graduated. There were a total of 559 households, actively participating in the program.

Although not a part of the Standard Metrics, HACSM has also been monitoring the housing outcomes for families exiting the program. In FY2017, of the 27 households who graduated from the program, none of the families expressed that they would have to enter shelter or become homeless graduation.

There were 16 families who requested a hardship extension in FY2017. Based on the hardship policy, HACSM approved all 16 of the requests. During FY17, six households requested hardship extensions due to the "tight rental market" criteria. There were also eight elderly and/or disabled households who requested portability due to reasonable accommodation, and all eight requests were granted.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
SS #1: Increase in Household Income							
Average earned income of households (\$)	As established in FY10, the average earned income of households at entry was \$17,858	Expected increase in average earned income of \$500 annually of households affected by this policy prior to implementation.	\$20,094	\$25,341	\$21,610	Benchmark Achieved	N/A
SS #2: Increase in Household Savings							
Average savings of households (\$)	As established in FY13, the average savings per household was \$569	Expected \$100 increase in savings per household	\$409	\$630	\$748	Benchmark Achieved	N/A
SS #3: Increase in Positive Outcomes in Employment Status (Based on Head of Household Information)							
Employed Full Time	FY13 nine (9) HOH who graduated from the program were employed full time at program entry	Expected number of HOH employed full time: 15	76 HOH	112 HOH	184 HOH	Benchmark Achieved	N/A
Employed Part Time	FY13 two (2) HOH who graduated from the program were employed part time at program entry	Expected number of HOH employed part time: 10	87 HOH	110 HOH	139 HOH	Benchmark Achieved	N/A
Enrolled - Ed Program	FY13 five (5) HOH who graduated from the program were enrolled in an education program	Expected number of HOH enrolled in education program: 10	49 HOH	54 HOH	100 HOH	Benchmark Achieved	N/A

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
Enrolled – Job Training	FY13 five (5) HOH who graduated from the program were enrolled in a job training program	Expected number of HOH enrolled in job training program: 10	22 HOH	26 HOH	135 HOH	Benchmark Achieved	N/A
Unemployed	FY13, eight (8) HOH who graduated from the program were unemployed at program entry	Expected number of HOH unemployed: 10	101 HOH	119 HOH	109 HOH	Numeric benchmark not achieved	HACSM has implemented quarterly meetings with household, to coach and mentor households where the HOH is unemployed or earning less than \$12,000 annually, in effort to support their continued progress. Practically speaking, HACSM staff are working very closely with these households to secure employment and/or education to become employed. Also, in many of these households, although the HOH is currently unemployed, there are other adult household members that are working, thus the family as a whole does have earned income.
SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)							
Number of households receiving TANF assistance	131 families were receiving TANF at program entry. In FY13, 83 families were receiving TANF	Decrease in the number of families receiving TANF by 10 families per year	36 Households	63 Households	60 Households	Benchmark Achieved	N/A
SS #5: Households Assisted by Services that Increase Self-Sufficiency							

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
Number of households receiving services aimed to increase self-sufficiency	In FY13, 19 families completed financial, employment, and educational workshops	HACSM expects 30 of the households receiving self-sufficiency services after implementation	243 Households	310 Households	479 Households	Benchmark Achieved	N/A
SS#6: Reducing Per Unit Subsidy Costs for Participating Households							
Average amount of Section 8 subsidy per household (\$)	In FY12, the average amount of Section 8 subsidy per household was \$1331	HACSM expects the average subsidy per household after implementation to remain consistent at \$1331	Average subsidy \$1,142	Average Subsidy \$1,477	Average subsidy \$1,526	Numeric benchmark not achieved	Due to the housing crisis and rapidly increasing contract rents on the open market, HACSM regularly reviews the HAP budget along with the rent burden for households served. Based on the current HACSM rental market, the average subsidy for the MTW program is in alignment with SMC as a whole.
SS#8: Households Transitioned to Self-Sufficiency							
Number of households transitioned to self-sufficiency	Zero (0) households transitioned to self-sufficiency prior to implementation	Expected number of households transitioned to self-sufficiency: 10/year	77 Households	16 Households	46 Households (27 due to reaching the time limit in addition to all hardship extensions and 19 households who no longer required any housing assistance for a period of 90 days.	Benchmark Achieved	N/A

The HACSM definition of Self-Sufficiency includes the following:

- The household has reached an income level such that HACSM is no longer providing subsidy on behalf of the family for a period of 90 days
- The household has reached the end of the voucher's time limit and will be graduating from the FSS program.

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2009-2: Housing Readiness Program (HRP)

Approved by HUD: FYE2009

Implemented by HACSM: 7/1/2008

Description of the activity

Through partnerships with San Mateo County's Center on Homelessness and other providers of homeless services, HACSM is able to serve up to 150 homeless families. Homeless families join the program through a referral process. In the original program design, new program participants received rental subsidy for up to three years while at the same time having continued access to various supportive services programs, provided by the homeless services partners. In August 2016, HACSM aligned the Housing Readiness Program with the MTW Self-Sufficiency Program (Activity #(2000-1) and expanded the term of participation for all new HRP participants from three years up to five years. In addition to the extended term of participation, at the time of initial lease up, the new households also meet with the FSS Coordinators to establish their goal plan and execute an FSS Contract of Participation. The referring agencies assist their households with their housing search and the initial 18 months of supportive services to assist in housing stabilization and success after which time the household continues to work with the HACSM team from the 19th month through the end of their program.

Impact of the activity

To date, the HRP has provided the San Mateo Community a key program to address the needs of homeless individuals and families residing in San Mateo County. In FY2017, HACSM 71 new homeless households were admitted to the Housing Readiness Program. In total HACSM assisted 150 different households in FY17.

In FY17, one household graduated from the program. Additionally, HACSM received 21 requests for hardship extensions, all of which were granted.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
SS #1: Increase in Household Income							
Average earned income of households (\$)	Average earned income of households affected by this policy in FYE13 was \$19,339	Expected average earned income in households affected by this policy after implementation is \$20,500	\$16,364	\$16,293	\$18,985	Benchmark not achieved	The Housing Readiness program is designed to assist individuals and families who are homeless, many of whom have experienced more than six-months of homelessness. Often, these individuals have other significant barriers such as substance abuse and other disabilities. The program was designed based on the

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
							"housing first" model and thus, at entry the individuals referred may have additional challenges to increasing their earned income immediately upon program entry. Another reason for challenges related to underperforming this metric includes the fact that the case management is provided by the referring agency, whose priorities for the household may differ on this metric. For example, the initial goal is housing stability, that will be a potentially positive long term impact for the family, but may negatively impact the results of this metric.
SS #2: Increase in Household Savings							
Average savings of households (\$)	Average savings per household at program entry in FY13 was \$249	Expected increase in savings per household: \$100	\$496	\$881	\$490	Benchmark Achieved	N/A
SS #3: Increase in Positive Outcomes in Employment Status (Based on Head of Household Information)							
Employed Full Time	In FY12, 11 HOH employed full time	Expected number of HOH employed full time: 11	16 HOH	6 HOH	42 HOH	Benchmark Achieved	N/A
Employed Part Time	In FY12, 12 HOH employed part time	Expected number of HOH employed part time: 10	17 HOH	10 HOH	30 HOH	Benchmark Achieved	N/A
Enrolled - Ed Program	In FY12, zero (0) HOH enrolled in an education program	Expected number of HOH enrolled in education program: 10	13 HOH	0 HOH	28 HOH	Benchmark Achieved	N/A
Enrolled – Job Training	In FY12, zero (0) HOH enrolled in a job training program	Expected number of HOH enrolled in job training program: 10	2 HOH	1 HOH	16 HOH	Benchmark Achieved	N/A
Unemployed	In FY12, 11 HOH unemployed	Expected number of HOH unemployed:	16 HOH	15 HOH	22 HOH	Benchmark Achieved	

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
		10					
SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)							
Number of households receiving TANF assistance	In FY12, 13 households were receiving TANF at program entry	Expected average of households receiving TANF: 10 Households	7 Households	12 Households	15 Households	Benchmark achieved	N/A
SS #5: Households Assisted by Services that Increase Self-Sufficiency							
Number of households receiving services aimed to increase self-sufficiency	Zero families were receiving self-sufficiency services prior to implementation of the activity	HACSM expects 40 household to receive self-sufficiency services after implementation of the activity	53 Households	99 Households	91 Households	Benchmark Achieved	N/A
SS#6: Reducing Per Unit Subsidy Costs for Participating Households							
Average amount of Section 8 subsidy per household (\$)	In FY12, the average amount of Section 8 subsidy per household: \$908	HACSM expects the average subsidy per household after implementation to remain consistent with overall MTW program at: \$1200	\$754	\$1,384	\$1,378	Benchmark achieved	Based on the current HACSM rental market, the average subsidy for the HRP program is in alignment with SMC as a whole. Also, due to the nature of the HRP program, many single adults have chosen shared housing situations as they exit homelessness.
SS#8: Households Transitioned to Self-Sufficiency							
Number of households transitioned to self-sufficiency	Zero (0) households transitioned to self-sufficiency prior to implementation	Expected number of households transitioned to self-sufficiency: 10/year	17 Households	13 Households	1 Household	Benchmark Achieved	Note: This one household is in addition to those noted in Activity #1.

The HACSM definition of Self-Sufficiency includes the following:

- The household has reached an income level such that HACSM is no longer providing subsidy on behalf of the family for a period of 90 days
- The household has reached the end of the voucher's time limit and will be graduating from the Housing Readiness program.

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2000-3: Eliminate 40% Affordability Cap at Initial Move-In/Lease Up

Approved by HUD: FYE2000

Implemented by HACSM: 5/1/2000

Description of the activity

The original MTW contract, executed in 2000, allowed HACSM to eliminate limits on the proportion of household income that could be spent on housing costs for its initial 300 time-limited MTW clients. In the FY2009 MTW Annual Plan, HACSM received HUD approval to expand this initiative to the entire HCV program.

This MTW activity is designed to support a family's ability to have greater housing choice, through having access to cities throughout San Mateo County. Prior to July 2009, many HCV applicants leasing up for the first time, and participants in the relocation process, were unable to secure housing outside high poverty areas due to the restrictive 40% affordability cap.

Although the hard affordability cap has been eliminated, HACSM continues to play a major role in negotiating rents on behalf of the participant when needed and has established safeguards to ensure the tenant portion of rent is affordable to the participant. Safeguards include, but are not limited to:

- Discussion of rent affordability with the participant before move-in
- Outreach to property owners to increase housing availability
- A calculation tool that shows the tenant portion of rent in relation to his/her income with the additional of excluded income sources that might mitigate the higher rent burden.
- Required supervisory approval procedures on a case-by-case basis for instances where the tenant rent burden is over 50% of their monthly adjusted income.

Impact of the activity

In FY2017, San Mateo County continued to be one of *the* highest cost of living communities in our nation. Current participants and new applicants searching for affordable housing in San Mateo County are faced with an extremely challenging and competitive housing market. Since implementation, HACSM has found that this activity has provided some necessary relief to those engaged in a search for affordable housing in San Mateo County.

In FY17, HACSM continued to monitor the lease up statistics, voucher utilization, and the prevailing rent burden for participants to ensure that vouchers are being utilized and participants are not facing an overly burdensome cost for housing. Upon review of the 188 new HAP Contracts for households seeking units on the open market (not in PBV units) initiated in FY17, 156 of households were paying up to 40% of their monthly adjusted income towards their rent, 25 of households were paying between 41-50% of their monthly adjusted income towards their rent, and 7 of households were paying 50% or more of their monthly

adjusted income towards their rent. It is important to note that, as discussed in the design of this activity above, all HAP contracts that could result in a household's paying more than 50% of their monthly adjusted income toward their rent received additional supervisory review and one-on-one discussions with the household. During the course of the review, HACSM staff review the households income, and potential excluded income sources that could positively impact the households ability to meet the additional rent burden to ensure the feasibility of the potential rental unit. This is an additional step that HACSM staff take to support the household on a case-by-case basis.

In FY17, four different PBV projects came online resulting in a significantly increased number of affordable "hard" units in four different cities in San Mateo County, including Daly City, Foster City, Menlo Park and Pacifica. These new construction and rehab PBV units, are all located in neighborhoods of opportunity, however they were not included in the metric below as they would have impacted the results for households searching in the extremely challenging the open market.

In FY17 HACSM received 714 Request for Tenancy Approvals (RTAs) and had to deny 17, approximately 2%, due to affordability exceeding 50% of the household's monthly adjusted income. Without this activity, the reality of finding and securing a new home would be even more bleak with the current realities of the San Mateo County housing market.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
HC #5: Increase in Resident Mobility							
Number of households able to move to a better units and/or neighborhood of opportunity as a result of the activity (increase).	Zero (0) families.	HACSM expects that 20 households will be able to move to a better unit and/or neighborhood of opportunity after implementation.	32 households were able to move to a better unit and/or neighborhood of opportunity.	82 Households	47 Households	Benchmark Achieved	As discussed since the FY15 Report, the San Mateo County rental market continued to be extremely competitive in FY17. The Housing Authority is actively working with affordable housing developers through the Project Based Voucher Program and the Housing and Community Development Division to finance new and rehabilitation projects that will increase the supply of affordable housing that is transit oriented and located in neighborhoods of opportunity.

							In FY16, HACSM joined San Francisco and Marin Counties to complete a local rent study. As a result of that, the FMR amounts were significantly increased as a result, also supporting voucher holders ability to access neighborhoods of opportunity. And, with the release of the 2017 Budget notice on June 29, 2017, HACSM has been reviewing increases in the subsidy for voucher holders.
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Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2009-5: Expand Usage of PBV at HACSM Developments Undergoing Disposition

Approved by HUD: FYE2010

Implemented by HACSM: 7/1/2009

Description of the activity

In HACSM's FY2009 Supplemental MTW Annual Plan, HACSM received approval to project-base up to 100% of the replacement vouchers at public housing units undergoing the demo/diso process. HACSM submitted two demo/diso applications in June 2010. The application for Midway Village was approved by HUD in January 2011 and vouchers were issued to all eligible households, 149 vouchers in total, in May 2011. All 150 units at Midway Village are now under a Project-Based HAP contract. The application for El Camino Village (ECV) was not approved by HUD. In late FY15, HACSM received its Commitment to Enter into a HAP (CHAP) from HUD.

Impact of the activity

In FY17, HACSM has been working with the HUD RAD office, regarding the potential conversion of ECV to a RAD-PBV project. This effort is on-going, and as of the writing of this Report, is continuing. As such, HACSM does not have any statistically updates from FY17 for this activity. HACSM has provided the baseline, benchmark information for this activity below.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
HC#4: Displacement Prevented							
Number of households at or below 80% AMI that would lose assistance or need to move (decrease).	30 households at El Camino Village could lose their housing assistance or need to move prior to implementation	Two (2) households	N/A	N/A	N/A	N/A	N/A

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2010-6 (Revised): Triennial Recertification Schedule for Elderly/Disabled Families

Approved by HUD: FYE2010

Implemented by HACSM: 7/1/2009

Description of the activity

Building upon the success of the original activity “Biennial Recertification Schedule for Elderly/Disabled Families,” in FY14 HACSM expanded the regular recertification schedule to once every three years for Elderly/Disabled households. As with the initial biennial activity, if the household also includes non-elderly/disabled adult members, and those members experience an increase in income, HACSM may recalculate the households annual adjust income in accordance with the HACSM’s Interim Policy, and potentially the HAP as well, due to the increase.

Impact of the activity

All households that are designated as elderly and/or disabled, are now scheduled for regular recertification appointments on a triennial basis. HACSM, however, will see the household and process interim adjustments in situations where the household income decreases or there is a change in the household composition. In FY17, 770 elderly and/or disabled households were seen for recertification with an average earned income per household of \$23,068.

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE #1: Agency Cost Savings							
Total cost of task (\$)	In FY14, the cost of completing this task was \$154,085	HACSM expects that the cost for completing this task to not exceed \$118,645	In FY15, the cost to complete this task was \$ 32,185	\$48,855	\$50,323	Benchmark achieved	N/A
CE #2: Staff Time Savings							
Total time to complete the task in staff hours	Total amount of staff time dedicated to the task prior to implementation of the activity was 2949 hours	Expected amount of total staff time dedicated to the task after implementation of the activity 1800 hours	In FY15, it required 618 hours to complete this task	688 Hours	796	Benchmark achieved	N/A

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE #5: Increase in Agency Rental Revenue							
Rental revenue in dollars	Rental revenue prior to implementation	Expected rental revenue after implementation	N/A – This activity has no impact on the “rental revenue” of the agency	N/A – This activity continues to have no impact on the agency’s “rental revenue”	N/A – This activity has no impact on the agency’s “rental revenue”	N/A	N/A

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2010-7: Simplify Rent Calculation Process

Approved by HUD: FYE2010

Implemented by HACSM: 7/1/2009

Description of the activity

In July 2009, HACSM implemented several MTW activities related to the rent calculation policies and procedures. It was HACSM's intent that implementing the new activities would create a more transparent process for participants, a streamlined and more efficient practice for HACSM, and overall improvement in the accuracy of the calculations. In July 2011, HACSM modified the activities resulting in the following:

- Asset Calculations
 - HACSM established a minimum threshold of \$50,000 in assets before any interest would be included or calculated when determining the household's annual adjusted income
 - If the household met, or exceeded the \$50,000 threshold, HACSM will include the *actual* interest earned in determining the household's annual adjusted income

Effective July 1, 2013, HACSM eliminated the EID portion of this activity as all current program participants were realizing greater benefit from the alternate recertification schedule, coupled with the HACSM interim policy

Since implementation, the streamlined method for calculating assets has significantly simplified the rent calculation process without creating further burden for program participants. In FY15, due to the new Standard Metrics reporting requirements, HACSM experienced an increase in staff time and administrative expense, due to the need to again capture, log, and track all participant assets regardless of their value. As was the case prior to initial implementation, most participants have assets less than \$1,200, so the administrative savings previously realized through this activity have been significantly reduced due to the required increase in data tracking.

With this FY17 Report, HACSM is proposing to roll together Activity 2012-25 "Exclude Asset Income from the Calculation for Households with Assets under \$50,000" into this activity as they are so closely aligned.

Impact of the activity

In FY17 the total gross assets of all program participants was \$1,933,802 with an average account balance of \$436. With this balance equaling almost 99% of accounts, in actuality program participants effectively earned zero interest. The low amount realized through this estimation has no financial impact for HACSM. In FY17 there were only 22 households with assets greater than \$50,000. In total, their assets equaled \$1,933,802 and on average, each household had \$87,902 in

gross assets. As directed through this activity, HACSM staff included the actual interest earned to the annual income calculation for these households.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE #1: Agency Cost Savings							
Total cost of task (\$)	In FY14, the cost of calculating the annual adjusted income for 3,102 households seen was \$59,774.	N/A	To calculate the annual adjusted income (AAI) for the 2860 households seeing in FY15, the agency cost was \$59,579	AAI for 2380 households seen, agency cost: \$61,068	AAI for 2846 households seen, agency cost: \$62,904	N/A	Increase in staff cost due to increase in salary and benefits
CE #2: Staff Time Savings							
Total time to complete the task in staff hours	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours)	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours)	950 hours complete calculation of the household's AAI	762 Hours	911 Hours	N/A	(See narrative for the determination of the Agency Cost Savings for this activity)
CE #3: Decrease in Error Rate of Task Execution							
Average error rate in completing the task (%)	Average error rate of task prior to implementation (%)	Expected average error rate of task after implementation (%)	3% of files reviewed had errors related to assets	0 (zero) files reviewed had errors related to the calculation of assets	0 (zero) files reviewed had errors related to the calculation of assets	Benchmark Achieved	N/A
CE #5: Increase in Agency Rental Revenue							
Rental revenue in dollars	Rental revenue prior to implementation	Expected rental revenue after implementation	N/A – This activity has no impact on the “rental revenue” of the agency	N/A – This activity has no impact on the “rental revenue” of the agency	N/A – This activity has no impact on the “rental revenue” of the agency	N/A	Due to the low dollar value of program participant's assets, and the rent reform program calculation, this activity has no direct impact on the “rental revenue” for HACSM.

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2010-8: Simplify Third Party Verification Process

Approved by HUD: FYE2010

Implemented by HACSM: 7/1/2009

Description of the activity

In FY2010, HACSM received HUD approval to simplify the third-party verification process associated with earned income, asset income, and medical and child care expenses, in an effort to relieve administrative burdens, increase productivity, and ease the intrusive nature of the process for HCV applicants and participants.

The streamlining activities included the following:

- Increase asset values requiring third-party verification
Effective July 1, 2009, HACSM increased the threshold at which assets require third-party verification from \$5,000 to \$50,000 for the HCV programs. In place of third-party verification, the family is required to provide a current statement from the financial institution(s) showing the balance of the asset account(s). All assets valued over \$50,000 continue to require third-party verification.
- Streamline verification of eligible medical expenses
Effective July 1, 2009 HACSM instituted a policy in which eligible families, who claim medical expenses, are required to sign a self-certification and provide supporting documents from credible and established sources, such as receipts from medical care providers or pharmacy statements as proof of the claimed expenses.
- Streamline the verification process for eligible child care expenses
Effective July 1, 2009 HACSM instituted a streamlined verification process to reduce the challenges in verifying claimed child care expenses. Eligible families who claim child care expenses are now required to sign a self-certification and provide supporting documents from credible and established sources, such as day care invoices, receipts or written statements from the child care provider as proof of the claimed expense. Expenses incurred from an adult member of the household who provides child care or the absent parent who does not reside in the subsidized unit, are not acceptable.
- Extend the verification timeline to 120 days
Effective July 1, 2009, HACSM implemented a revised timeline for verification documentation to 120 days for HCV applicants and participants. This new timeline reduces duplication of work and accelerates an applicant's admission to the program and a participant's recertification for continuing program eligibility.

HACSM continues to use the Enterprise Income Verification (EIV) system for verification of participant identity, wage and assistance benefits.

Impact of the activity

This activity has continued to support the HACSM MTW program and has been successful in creating efficacies that provide the avenues for staff resources to be allocated to self-sufficiency activities.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE #1: Agency Cost Savings							
Total cost to complete the task	In FY09, the total cost to complete this task was \$29,285	\$15,000 annually	In FY15, the total cost to complete this task was \$7,150	\$1,666	\$1,716	Benchmark Achieved	N/A
CE #2: Staff Time Savings							
Total time to complete the task in staff hours	On average, HACSM staff spent 738 hours annually to process third-party verifications (est. FYE2009)	HACSM expects an average of no more than 369 hours per year for staff to process third-party verifications	In FY15, HACSM spent an average of 119 hours to process third-party verifications	99 Hours	119 Hours	Benchmark Achieved	N/A
CE #3: Decrease in Error Rate of Task Execution							
Average error rate in completing the task as a percentage	Average error rate of task prior to implementation	Expected average error rate of task after implementation: 10%	The average error rate in FY15 was approximately 15%	The average error rate in FY16 was approximately 1%	The average error rate in FY17 was 0%	Benchmark not achieved	HACSM did not track this metric prior to implementation of the Standard Metrics so can only report back on the percentage of errors in each reporting period.
CE #5: Increase in Agency Rental Revenue							
Rental revenue in dollars	Rental revenue prior to implementation	Expected rental revenue after implementation	The agencies rental revenue was \$1,777,306	\$1,707,628	\$1,933,802	N/A	Note: This "rental revenue" is a theoretical amount as it relates to the Housing Authority. The "rental revenue" is the household's "Tenant Rent Portion" that is paid by the tenant directly to the private market landlord, not the Housing Authority.

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2010-9: Tiered Subsidy Tables (TST)

Approved by HUD: FYE2010

Implemented by HACSM: 3/1//2010

Description of the activity

The TST, a subsidy table representing the first of its kind in the nation, gives HACSM the ability to inform the participant of the maximum dollar amount that HACSM will contribute to their housing costs *at the time* of voucher issuance. This is a 180° change from the standard HCV rules that cannot determine the participant's subsidy portion until after a potential unit is secured and the contract rent and utility responsibilities are negotiated with the landlord/owner.

While other housing authorities have established rent tables that inform a participant of their rent portion based on eligible bedroom size, HACSM's TST gives participants the ability to search for available units with the knowledge of exactly how much HACSM will contribute to their housing costs throughout San Mateo County, make personal decisions as to how much of their income they are comfortable contributing towards their housing costs, and practice in negotiating with owners through the leasing process. The HACSM intention through this program change is to empower the participants to take personal responsibility for their lives, starting with their housing decisions.

Impact of the activity

In FY17 the TST has continued to provide greater flexibility for families and a simpler rent calculation method for staff. Because of the on-going high rents in San Mateo County, HACSM has continued to closely monitor the subsidies provided by the TST and resulting tenant rent burden. In October 2015 HACSM increased the subsidy amounts of the TST to reflect the current, extremely competitive rental market in San Mateo County, however, due to the uncertainty in the 2017 Federal Budget, HACSM was unable to increase the subsidies in FY17.

In late 2016/early 2017 HACSM participated in a regional FMR review, in collaboration with the San Francisco Public Housing Authority and Marin County due to the continued housing crisis and rapidly increasing costs in the rental market for the greater San Francisco regional area. While, HACSM received notice of HUD approval of the increased FMR amounts and began an impact analysis, HACSM did not receive any updates to its' budget authority and due to this, was unable to increase the subsidies on the TST during FY17.

HACSM has not received any hardship requests in relation to the TST rent reform program during FY17.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE #1: Agency Cost Savings							
Total cost to complete the task	In FY14, cost of task prior to implementation: \$81,000	Expected cost of task after implementation: \$81,000	In FY15, the cost to complete this task was \$74,474	\$65,474	\$78,251	Benchmark achieved	As discussed in the FY14 Report, HACSM did not separate the time or cost for this specific task in the recertification process, and thus is not able to provide a baseline prior to implementation. In FY14, HACSM proposed to use \$81,000 as the baseline and benchmark in future reports.
CE#2: Staff Time Savings							
Total time to complete task in staff hours	In FY14, this task required 1,550 staff hours	Expected staff time required to complete this task, 1,550 hours	In FY15, the staff time to complete this task was: 1,430 hours	1,190 hours	1423 hours	Benchmark achieved	N/A
CE #3: Decrease in Error Rate of Task Execution							
Average error rate in completing the task as a percentage	Average error rate of task prior to implementation	Expected average error rate of task after implementation: 10%	Approximately 4% of files failed file review.	Approximately 2% of the files failed file review.	Approximately 4% of the files failed file review.	Benchmark achieved	Upon review, the incorrect subsidy amounts were not due to rent reform, TST schedule, but rather to errors made in the calculation of the households annual adjusted income. In each case, HACSM staff received further instruction regarding the specific errors.
CE #5: Increase in Agency Rental Revenue							
Rental revenue in dollars	Rental revenue prior to implementation	Expected rental revenue after implementation: \$1,638,019	Actual rental revenue after implementation: 1,777,306	\$1,707,628	\$2,207,040	N/A	Note: This "rental revenue" is a theoretical amount as it relates to the Housing Authority. The "rental revenue" is the household's "Tenant Rent Portion" that is paid by the tenant directly to the private market landlord, not the Housing Authority.
SS #1: Increase in Household Income							

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
Average earned income of households (\$)	In FY13 the average earned income per household was \$25, 566	\$256 per year (a 1% increase)	In FY15, the average earned income per household was \$20,773, a \$5,203 decrease	\$21,897 per household	\$23,068 per household	Benchmark not achieved	Although this benchmark has not been fully achieved in FY17, overall the average has increased from FY15 - FY17. HACSM staff will continue to work with the self-sufficiency households on this important goal.
SS #3: Increase in Positive Outcomes in Employment Status (Based on Head of Household Information)							
Other: Employment	Number of HOH employed	Expected number of HOH employed after implementation: 1,300	Actual number of HOH employed after implementation: 1543	2,319	2,519	Benchmark achieved	Prior to implementation of the Standard Metrics HACSM did not collect this information and thus is unable to provide a baseline prior to implementation. In FY15, HACSM developed data tracking methods for this activity. HACSM established the benchmarks for this metric with the submission of the submission of the Report (FY15).
	Percentage of total work-able households employed	Expected percentage of total work-able households employed after implementation: 50%	Actual percentage of total work-able households employed after implementation: 58%	59%	57%	Benchmark achieved	
Unemployed	Number of HOH unemployed	Expected number of HOH unemployed after implementation: 400	Actual number of HOH unemployed after implementation: 341	95	81	Benchmark achieved	
	Percentage of total work-able households who are unemployed	Expected percentage of total work-able households who are unemployed after implementation: 11%	Actual percentage of total work-able households who are unemployed full time after implementation: 11%	2%	1.5%	Benchmark achieved	

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
		15%					
SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)							
Number of households receiving TANF assistance	Number of families receiving TANF at program entry	Expected average of households receiving TANF after implementation: 400	Actual number of households receiving TANF after implementation. 307	267	249	Benchmark achieved	Prior to implementation of the Standard Metrics HACSM did not collect this information and thus is unable to provide a baseline prior to implementation. HACSM established the benchmark for this metric with the submission of the FY15 Report..
SS#8: Households Transitioned to Self-Sufficiency *							
Number of households transitioned to self-sufficiency	HACSM is unable to determine the number of households transitioned to self-sufficiency prior to implementation, however, in FY13, 11 households left the program due to "Zero HAP" status	HACSM expects 2 households will transition to self-sufficiency after implementation	In FY15, 19 households transitioned to self-sufficiency.	16 households due to graduation from MTW-SS Program, and 22 due to income increases such that they was no HAP paid for a period of 90 days.	27 households due to graduation from MTW-SS Program, 1 household due to graduation from the MTW-HRP program and 19 due to income increases such that there was no HAP paid for a period of 90 days.	Benchmark achieved	N/A

* The HACSM definition of Self-Sufficiency includes the following:

- The household has reached an income level such that HACSM is no longer providing subsidy on behalf of the family for a period of 90 days, or
- The household has reached the end of the voucher's time limit and will be graduating from the FSS program, with escrow payout.

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2010-10: Simplify HQS Process (HACSM-owned or affiliated properties)

Approved by HUD: FYE2010

Implemented by HACSM: 7/1/2009

Description of the activity

HACSM is allowed to inspect HACSM-owned properties to determine HQS compliance. HACSM not required to submit inspection reports for HACSM-owned or affiliated properties to the HUD Field Office

Impact of the activity

This activity has continued to be effective in supporting the HACSM goal of increased administrative efficiency.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE #1: Agency Cost Savings							
Total cost of task in dollars	In FYE09, HACSM had an annual direct cost of \$1,500 to hire outside consultants to inspect HACSM-owned properties	HACSM expects that this task will cost no more than \$6,000 annually, after implementation	In FY15, the cost to conduct these inspections was \$1,612	\$1,875	\$4,749	Benchmark Achieved	N/A
CE #2: Staff Time Savings							
Total time to complete the task in staff hours	In FYE10, the total staff time per inspection: 60 hours	Expected amount of total staff time to complete the task: 112 hours	In FYE15, 58 hours were required to complete HQS inspections at HACSM-owned properties.	75 hours at a rate of one hour per inspection, conducted by the outside consultant	91 hours at a rate of one hour per inspection, conducted by the outside consultant	Benchmark Achieved	N/A
CE #3: Decrease in Error Rate of Task Execution							
Average error rate in completing the task as a percentage	In FY14, the average error rate was 28%	Average error rate in completing the task: 10%	Average error rate in completing HQS inspections was 0%	Average error rate in completing HQS inspections at HACSM-owned properties was 0%	Average error rate in completing HQS inspections at HACSM-owned properties was 0%	Benchmark Achieved	N/A

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2010-11: Eliminate Competitive Process for Allocation of PBV to Former Public Housing

Approved by HUD: FYE2010

Implemented by HACSM: 1/27/2011

Description of the activity

In FY2011, HACSM received HUD approval to allocate project-based vouchers to its former public housing units without the use of a competitive process. In FY14, HACSM received HUD approval to expand the scope of this activity to include other housing units owned by HACSM or HACSM affiliates such as the redeveloped Half Moon Village.

Impact of the activity

HACSM did not have any Public Housing or other HACSM owned or affiliated properties that converted to PBV in FY17.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE #1: Agency Cost Savings							
Total cost to complete the task	Cost of task prior to implementation was \$3314.40	Expected cost of task after implementation: \$4,000	N/A	N/A	N/A	N/A	N/A
CE #2: Staff Time Savings							
Total time to complete task in staff time	40 hours	HACSM expects that it will take 20 hours to complete this task	N/A	N/A	N/A	N/A	N/A

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2010-12: Waive 12 Month Stay Requirement for Residents in Formerly Public Housing Units Converted to PBV

Approved by HUD: FYE2010

Implemented by HACSM: 5/1/2011

Description of the activity

With this activity, HACSM has the authority to offer residents of public housing units undergoing disposition from public housing status, the option to relocate immediately or any time thereafter, using a tenant transfer voucher. With the approval of HACSM's demo/diso application, existing public housing residents at the time of disposition are not required to stay in their unit for 12 months after conversion to PBV assistance. Instead, former public housing residents have the choice to determine if and when they want to move. Midway Village, completed its Demo/Dispo process in FYE12. In FY15, HACSM received its Commitment to enter into a HAP (CHAP) from HUD for El Camino Village and has been working with HUD regarding converting the property from Public Housing to a RAD-Project Based complex.

Impact of the activity

In FY17, HACSM has continued to work with the HUD RAD office, regarding the potential conversion of ECV to a RAD-PBV project. This effort is on-going, and as of the writing of this Report, is continuing. As such, HACSM does not have any statistically updates from FY17 for this activity. HACSM has provided the baseline, benchmark information for this activity below.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
HC#5: Increase in Resident Mobility							
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity	In FY10, (0) households able to move to a better unit/or neighborhood of opportunity	HACSM expects that two (2) households are able to move to a better unit and/or neighborhood of opportunity after implementation	N/A	N/A	N/A	N/A	N/A
HC#7 Household Assisted by Services that Increase Housing Choice							
Number of households receiving services aimed to increase housing choice	In FY10, (0) households were receiving this type of service	HACSM expects that 2 households will receive these services after implementation	N/A	N/A	N/A	N/A	N/A

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2010-13: Accept Lower HAP by Modifying PBV Rules for In-place Residents at former Public Housing Developments

Approved by HUD: FYE2010

Implemented by HACSM: 5/1/2011

Description of the activity

At the time of disposition, if a public housing resident is residing in an oversized unit and HACSM does not have the proper size unit available for the resident to relocate, HACSM will accept a lower HAP based on the unit size the resident qualifies for and not the actual unit size occupied. However, as is the current policy, as units of the appropriate size become available at the subject project-based property, the over-housed resident will be required to move into the newly available unit. As reported in FY12, the dispo application for Midway Village was approved and the conversion completed. In FY15, HACSM received its Commitment to enter into a HAP (CHAP) from HUD for El Camino Village and has been working with HUD regarding converting the property from Public Housing to a RAD-Project Based complex.

Impact of the activity

In FY17, HACSM has continued to work with the HUD RAD office, regarding the potential conversion of ECV to a RAD-PBV project. This effort is on-going, and as of the writing of this Report, is continuing. As such, HACSM does not have any statistically updates from FY17 for this activity. HACSM has provided the baseline, benchmark information for this activity below.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
HC#4: Displacement Prevented							
Number of households at or below 80% AMI that would lose assistance or need to move (decrease).	In FY14, there are seven (7) households at or below 80% AMI at El Camino Village who are over-housed and that would lose assistance or need to move	HACSM expects that no more than 5 households at or below 80% AMI would lose assistance or need to move (decrease).	N/A	N/A	N/A	N/A	N/A

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2010.14: Establish Flat or Market Rate Policy for Over-income Public Housing Residents at Conversion of Public Housing Units to Project-Based Units

Approved by HUD: FYE2010

Implemented by HACSM: 5/1/2011

Description of the activity

Permits residents of public housing undergoing the disposition process that are not eligible to receive a voucher due their household income which exceeds the income limitations of the voucher program to have the option to remain in the unit (for a maximum of 12 months) at the higher of the flat rate or market rate for the unit. Additionally, should the former resident's income level in the subsequent six months (after vacating the public housing development) decrease to a level that they would be income eligible, they will be allowed to re-apply to the project based wait list with a preference. At such time as the resident vacated the unit, the unit would convert to a standard project-based unit. As reported in FY12, the dispo application for Midway Village was approved and the conversion completed. In FY15, HACSM received its Commitment to enter into a HAP (CHAP) from HUD for El Camino Village and has been working with HUD regarding converting the property from Public Housing to a RAD-Project Based complex.

Impact of the activity

In FY17, HACSM has continued to work with the HUD RAD office, regarding the potential conversion of ECV to a RAD-PBV project. This effort is on-going, and as of the writing of this Report, is continuing. As such, HACSM does not have any statistically updates from FY17 for this activity. HACSM has provided the baseline, benchmark information for this activity below.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
SS #1: Increase in Household Income							
Average earned income of households (\$)	Averaged earned income of households at El Camino Village equal: \$23,410	Expected averaged earned income of households affected by this policy prior to implementation (\$)	N/A	N/A	N/A	N/A	N/A
SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)							
Number of households receiving TANF	FY14, five (5) households were receiving TANF	Expected number of households receiving TANF after	N/A	N/A	N/A	N/A	N/A

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
assistance		implementation: Five (5) households					
SS #6: Reducing Per Unit Subsidy Costs for Participating Households							
Average amount of Section 9 subsidy per household (\$)	FY14, the average Section 9 subsidy per household: \$1,309	Expected average subsidy per household after implementation: \$1,309	N/A	N/A	N/A	TBD	N/A
SS #7: Increase in Agency Rental Revenue							
PHA rental revenue (\$)	FY14, PHA rental revenue \$239,052	Expected PHA rental revenue after implementation \$239,052	N/A	N/A	N/A	TBD	N/A
SS #8: Households Transitioned to Self-Sufficiency *							
Number of households transitioned to self-sufficiency	Zero (0) households transitioned to self-sufficiency prior to implementation	HACSM does not expect this activity to impact a households self-sufficiency, therefore the expected number of households transitioned to self-sufficiency after implementation to be 1 household	N/A	N/A	N/A	TBD	N/A

* The HACSM definition of Self-Sufficiency for this activity includes the following:

- The household has reached an income level such that HACSM is no longer providing subsidy on behalf of the family for a period of 12 months.

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2011-15: Institute Biennial Inspection Schedule for Units Under Contract

Approved by HUD: FYE2011

Implemented by HACSM: 7/1/2010

Description of the activity

All HCV units are inspected on a biennial schedule. HACSM continues to conduct any complaint inspections. The units must at all times meet Housing Quality Standards while under contract

Impact of the activity

The biennial inspection schedule has continued to support the HACSM goal of greater administrative efficiency. It has also provided HACSM staff the time savings to redirect toward assisting participants to secure housing, facilitating the lease up process between the participants and landlords and finally, to conduct owner outreach, which is absolutely vital in San Mateo County at this time.

In FY17, HACSM collaborated with the Behavioral Health and Recovery Services Department to hold its' annual "Housing Heros" to recognize local landlords who support low income households who also have mental health and other disabilities. The event was well attended and encouraged more participation in the housing subsidy programs.

The HACSM Leasing Team continued to develop newsletters that were mailed to owners along with their HAP statements. The newsletters included program information that addressed frequently asked questions and/or potential emerging issues.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE#1: Agency Cost Savings							
Total cost of task in dollars	On average the cost to complete HQS inspections prior to implementation: \$195,046	HACSM expects that it will cost no more than \$100,000 (annually) to complete HQS inspections	Actual cost to conduct HQS inspections: \$55,976	\$111,471	\$138,960	Benchmark Achieved	As discussed in the FY16 Annual Report, when HACSM established the benchmark for this activity, it did not consider the increased costs due to increased salary and benefits. If those annual increases due to cost of living are taken into consideration, this activity has met its expected outcome.

CE#2: Staff Time Savings							
Total time to complete task in staff hours	On average, it required 4,157 hours annually to complete the annual HQS inspections prior to implementation	HACSM expects that will require 2,161 hours to complete HQS inspections on an annual basis	Actual amount of total staff time dedicated to complete HQS inspections: 1,952 hours	2026 Hours	2527 Hours	Benchmark Achieved	N/A
CE #3: Decrease in Error Rate of Task Execution							
Average error rate in completing the task as a percentage	HACSM is establishing this baseline with the FY13. The error rate was 44%	Average error rate: 25%	Average error rate in HQS inspections was 4%	Average error rate in HQS inspections was 0%	Average error rate in HQS inspections was 0%	Benchmark Achieved	N/A

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2011-16: Expand the Section 8 Project-Based Voucher Program

Approved by HUD: FYE2011

Implemented by HACSM: 5/23/2011

Description of the activity

Effective July 1, 2010 HACSM received HUD approval to increase its voucher budget authority to 30% for the Project-Based program. Expansion of the PBV program is one of the major resources for the development of additional affordable housing units and will assist the San Mateo County to meet the goals of its HOPE Plan, the County's 10 year plan to end homelessness.

In selecting future Project-Based projects, HACSM has acknowledged that it will give preference to properties that are newly constructed, located near public transportation corridors, and contain energy efficient features. This activity provides an avenue to increase housing choice for families by increasing the supply of decent, safe, and sanitary affordable housing. By diversifying the use of our finite number of vouchers, this initiative will provide a wider variety in type and location of housing for our participants, present and future.

In FY14, HACSM adopted policies to support the original activity proposal that requires participating families to stay at least 24 months in a PBV unit before they are eligible to move with continued assistance; and, that any continued assistance would be a part of the MTW/FSS program, the five year, time-limited program. If there is a need for additional housing assistance at the end of the term of participation, the family could apply for a "hardship" at that time.

Impact of the activity

As of June 30, 2017, HACSM has project based approximately 24% of its HCV portfolio.

During FY17, the following projects had completed construction or rehab and are now under HAPs.

- 1) Alma Point is a 66-unit affordable new construction senior development located in Foster City, CA. All 33 PBV units are fully leased.
- 2) Ocean View Senior Apartments, a 100-unit affordable senior property located in Pacifica, CA. All 31 PBV units are fully leased.
- 3) Sequoia Belle Haven is a 90-unit affordable new construction senior development located in Menlo Park, CA. All 69 PBV units are fully leased.
- 4) Sweeney Lane is a 52-unit affordable new construction multi-family development located in Daly City, CA. All 26 PBV units are fully leased.

As of June 30, 2017, the following project was under AHAP:

- 1) University Avenue Senior Housing is a 41-unit affordable new construction senior development located in E. Palo Alto, CA. With the exception of the manager unit, all 40 units will be covered by PBV.

Note: As of the writing of this report, construction at University Avenue Senior Housing has been complete and all PBV are fully leased.

As of June 30, 2017, the following projects received PBV commitment from HACSM:

- 1) Colma Veterans Housing, a 66-unit affordable new construction development serving veterans. The project is located in Colma, CA. Once developed, 58 units will serve HUD-VASH eligible households while the other 7 units will be HCV Project-Based units and are veteran preference.
- 2) Rotary Miller Senior Apartments, an 81-unit affordable new construction senior development located in South San Francisco, CA. All units, once developed, will be deemed affordable with 8 units covered by HCV Project-Based Vouchers.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE #1: Agency Cost Savings							
Total cost of task in dollars	Cost of task prior to implementation (\$)	Expected cost of task after implementation (\$)	Actual cost of task after implementation of the activity (\$)	N/A	N/A	N/A	When originally implemented, HACSM did not consider this to be an activity that would lead to agency cost savings. As such, HACSM did not measure this type of baseline, nor did it establish a cost savings benchmark.
CE #2: Staff Time Savings							
Total time to complete task in staff hours	Total amount of staff time dedicated to the task prior to implementation (hours)	Expected amount of total staff time to complete the task after implementation (hours)	Actual amount of total staff time dedicated to the task after implementation of the activity (hours)	N/A	N/A	N/A	HACSM has not realized staff time savings as a result of this MTW activity.
HC #4: Displacement Prevention							
Number of households at or below 80% AMI that would lose assistance or need to move (decrease). If the	There were zero (0) households losing assistance/moving prior to implementation of the activity	Zero (0) households are expected to lose assistance or be required to move after implementation	In FY15, Zero (0) households have lost their housing assistance or been required to move due to this activity	In FY16, Zero (0) households have lost their housing assistance or been required to move due to this activity	In FY16, Zero (0) households have lost their housing assistance or been required to move due to this activity	Benchmark achieved	N/A

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
units reach a specific type of household, HACSM will give that type here.							

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2011-17: Revise Eligibility Standards

Approved by HUD: FYE2011

Implemented by HACSM: 7/1/2010

Description of the activity

HACSM implemented an asset value limit for all new applicants and participants. The HACSM policy includes the following criteria: 1) If an applicant has assets exceeding \$100,000, or a present ownership interest in a suitable home in which they have a legal right to reside, they are determined to be ineligible for the program, 2) If a participant experiences an increase in assets, such that their assets are currently valued at more than \$100,000, or has (since their last reexamination) gained ownership interest in real property in which the participant has a legal right to reside, the participant would be determined ineligible for continued assistance. This determination is made through the recertification process, annually or biennially, based on the household's regular recertification schedule.

In January 2014, HACSM opened its MTW Waitlist for the first time since July 2008.

Impact of the activity

This activity has continued to provide HACSM with an efficient tool to reach the most needy households in our community. In FY17, approximately 7,181 households had submitted a pre-application and HACSM randomly selected 800 households for the waitlist and subsequent initial eligibility determinations. In FY17, one household was denied eligibility due to exceeding the asset limits and three households were denied due to owning property where they have the legal right to reside.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
HC #3: Decrease in Wait List Time							
Average applicant time on wait list in months	Average applicant time on wait list prior to implementation was 36 months	Expected average applicant time on wait list after implementation will be 36 months	In FY14, the average applicant time on wait list was approximately 2 months	Approximately 2 months	Approximately 2.3 months	Benchmark Achieved	N/A

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2011-18: Eliminate 100% Excluded Income from the Income Calculation Process

Approved by HUD: FYE2011

Implemented by HACSM: 7/1/2010

Description of the activity

Effective July 1, 2010, HACSM no longer verifies, counts, or reports income that HUD specifies as 100% excluded from the income calculation process. Examples of 100% excluded income are food stamps and the earned income from minors. HUD regulation 24 CFR 5.609 (c) provides a complete list of all income sources that HUD specifies to be excluded when calculating a family's annual income. Because this income is excluded from the income calculation process, it does not affect the amount of a family's rental assistance.

Impact of the activity

This activity has continued to support the HACSM efforts for administrative streamlining and cost effectiveness in the MTW program.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE#1 Agency Cost Savings							
Total cost of task in dollars	In FY10, HACSM spent approximately \$7,400 annually on this task prior to implementation	HACSM expects that this task will cost no more than \$1,825 annually after implementation	In FY15, the cost of this activity was \$1,610	\$1001	\$1,031	Benchmark achieved	N/A
CE#2 Staff Time Savings							
Total time to complete the task in staff hours	In FY10, the total amount of staff time required to complete the task prior to implementation: 60 hours	Expected amount of total staff time to complete the task after implementation: 30 hours	In FY15, the actual staff time to complete the task: 30 hours	25 Hours	30 Hours	Benchmark achieved	N/A
CE #3: Decrease in Error Rate of Task Execution							
Average error rate in completing the task as a percentage	Average error rate in completing the task as a percentage	Average error rate in completing the task as a percentage: 0%	Average error rate in completing the task as a percentage: 0%	Average error rate: 0%	Average error rate: 0%	Benchmark achieved	As reported in FY14, HACSM is unable to provide a baseline for this metric, as this date was not collected prior to implementation of the activity. Also, due to the fact that staff do not collect, verify, or include in the calculation of the household annual adjusted income, the on-going error rate is 0%.

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2011-19: Eliminate the Requirement to Complete New HAP Contract with Utility Responsibility Changes

Approved by HUD: FYE2011

Implemented by HACSM: 7/1/2010

Description of the activity

CFR 982.308 (g) (2) (i) requires PHAs to execute a new HAP contract with the owner if there are any changes in lease requirements governing tenant or owner responsibilities for utilities or appliances. Effective July 1, 2010, HACSM received HUD approval to eliminate the requirement of executing a new HAP contract with the owner in such instances as described above. Instead, upon receipt of a written notification from the tenant or the owner detailing the changes, HACSM will review the contract rent to ensure its rent reasonableness, adjust the tenant portion of rent and HAP payment if applicable, and confirm the changes by issuing a rent change notice.

Impact of the activity

Due to the fact that this activity only applies to participants who have a HAP contract in place prior to July 1, 2010 and who do not relocate, this activity continues to see minimal, or no activity. However, in instances when it does apply, this activity is very helpful in maintaining the HACSM goal of administrative streamlining. In FY17, there were no cases where the owner requested a change in the utility responsibilities for their assisted unit.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE#1 Agency Cost Savings							
Total cost of task in dollars	Est. FY2010, HACSM spent \$1,339 annually to complete this task prior to implementation of the activity	The expected cost of task after implementation of the activity is \$275	In FY15 the cost to complete this task was \$203	In FY16 HACSM incurred no cost for this activity	In FY17 HACSM incurred no cost for this activity	Benchmark Achieved	N/A
CE#2 Staff Time Savings							
Total time to complete the task in staff hours	In FY10, 34 hours were required to complete this task	HACSM expects that it will require six (6) hours to complete this task after implementation	In FY15 it required 5.25 hours to complete this task	0 Hours	0 Hours	N/A	HACSM received no requests for changes in utility responsibilities in FY17, thus there were no time savings

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2012-21: Change Qualifications for Full-Time Student Status

Approved by HUD: FYE2012

Implemented by HACSM: 7/1/2011

Description of the activity

In order for a family member, other than the head, co-head, or spouse to qualify for the FTS status, dependent deduction and income exclusion, the family member must be less than 24 years old, a FTS at an accredited institution, and must provide a transcript of the full-time student status at all subsequent recertification appointments.

Impact of the activity

HACSM has continued to find this activity a key support in encouraging High School graduates to continue on with their college courses immediately thereafter. In FY17, there were three households with full time students over the age of 24, with on average, earned income of approximately \$34,000. HACSM did not receive any hardship requests as a result of this activity.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE #5: Increase in Agency Rental Revenue							
Rental Revenue in dollars	FY11 the rental revenue prior to implementation: \$0	Expected rental revenue after implementation of the activity: \$453,738	N/A	\$9,245	\$15,213	Benchmark Achieved	Note: Since this activity is primarily implemented for the HCV program, "rental revenue" is a theoretical concept, as HACSM does not receive any income from the portion paid by the subsidized household. This portion represents the amount the household pays to a private market landlord.

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2012-22: Include Foster Care, KinGap, and Adoption Assistance Payments in Annual Income Calculation

Approved by HUD: FYE2012

Implemented by HACSM: 7/1/2011

Description of the activity

HACSM includes foster care, Kin Gap, and adoption assistance payments in the determination of annual adjusted income. To help offset this inclusion of this income, HACSM provides a dependent allowance for foster children, disabled foster adults, and adopted children

Impact of the activity

In FY17, HACSM did not receive any hardship requests as a result of this activity and current participants continue to support foster children and foster adults in San Mateo County.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE #5: Increase in Agency Rental Revenue							
Rental Revenue in dollars	Rental revenue prior to implementation of the activity: \$0	Expected rental revenue after implementation: \$96,000	N/A	\$0	\$0	Benchmark Achieved	N/A

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2012-23: Modify Head of Household (HOH) Changes Policy

Approved by HUD: FYE2012

Implemented by HACSM: 7/1/2011

Description of the activity

In order to encourage families towards self-sufficiency and reach more eligible households on the HCV waitlist, HACSM implemented the following policies regarding the activities for head of household change requests. The HACSM policies include the following:

- The individual becoming the new HOH must be in the household for at least the previous 12 consecutive months, and
- At the time of the HOH change, the household would join the time-limited MTW Self-Sufficiency program (MTW On-going Activity #1). However, if household is already enrolled in the time-limited MTW Self-Sufficiency program, the remaining household members would only be eligible for the remaining term, not an additional term.

Impact of the activity

In FY17, 46 households experienced a change in the HOH.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
HC #3: Decrease in Wait List Time							
Average applicant time on wait list in months	Average applicant time on wait list prior to implementation was 36 months	Expected average applicant time on wait list after implementation will be 36 months	In FY15, the actual average applicant time on wait list was 1.2 months	Approximately 2 months	Approximately 2.3 months	Benchmark Achieved	N/A

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2012-24: Change Automatic Termination of HAP Contact from 180 to 90 Days

Approved by HUD: FYE2012

Implemented by HACSM: 7/1/2011

Description of the activity

HACSM reduced the number of days that a participant can remain on the program, while paying 100% of their rent, from 180 to 90 consecutive days.

Impact of the activity

HACSM continues to monitor this activity and the households who reach “zero” HAP status. In FY17, HACSM continued to see an on-going trend that while some households were able to graduate from the program as a result of reaching an income level such that they no longer needed the housing assistance, others did experience changes that resulted in the need for on-going housing assistance within the 90-day timeline. During FY17, 29 households reached “zero HAP” status, 19 households exited the program, and 4 experienced a change in household income and as a result remain on the program.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
HC #3: Decrease in Wait List Time							
Average applicant time on wait list in months	Average applicant time on wait list prior to implementation was 36 months	Expected average applicant time on wait list after implementation will be 36 months	In FY15, the actual average applicant time on wait list was 1.2 months	Approximately 2 months	Approximately 2.3 months	Benchmark Achieved	N/A

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2012-26: Commitment of MTW Funds for Leveraging in the Creation of Additional Affordable Housing in San Mateo County

Approved by HUD: FYE2012

Implemented by HACSM: 10/26/2011

Description of the activity

HACSM originally committed up to \$4,000,000 of MTW funds for the development of additional affordable (low income, very low income and extremely low income) housing in San Mateo County. In the HACSM FY13 Annual Plan, HACSM received HUD approval to increase this commitment up to \$8,000,000 of MTW funds and in FY15 the total HUD-approved MTW funds increased to a total of \$10,000,000. The re-programmed funds are to be used to leverage additional investment funds that will be substantially larger than HACSM commitments. Development activities may include site acquisition, substantial rehabilitation of existing stock, and development of new units.

Impact of the activity

This activity has been essential to the development of new construction affordable housing units in San Mateo County. In FY17 NOFA, approximately \$1 million were issued to fund the development of 60 new units in the next 2-3 years for work-able households.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
HC#1: Additional Units of Housing Made Available							
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household, HACSM will provide that information here.	Est. FY11, Zero (0) housing units of this type prior to implementation of this activity.	HACSM expects the creation of at least 20 affordable units per \$1,000,000 invested	In FY 15, 115 senior housing units at Half Moon Village Phase II were made available after implementation of the activity	126 units	60 units	Benchmark Achieved	N/A

HC #2: Units of Housing Preserved							
Number of housing units preserved for households at or below 80% AMI as a result of the activity.	Housing units preserved prior to implementation (0)	Expected housing units preserved after implementation 60	In FY15, 15 senior housing units were preserved after implementation	0 housing units	0 housing units	Benchmark not achieved	N/A
CE #4: Increase in Resources Leveraged							
Amount of funds leveraged (\$)	\$0 leveraged prior to implementation (\$)	HACSM expects to leverage \$3 million dollars for every \$1 million dollars invested	In FY15, the total investment of \$3.2 million was leveraged by a total development cost of \$56.2 million (essentially 18:1)	In FY16, the total investment of \$10 million was leveraged by a total development cost of \$201.2 million, a 20.1/1 ratio.	In FY17, the total investment of \$1 million was leveraged an additional \$300,000 from San Mateo County Measure A funds.	Benchmark Achieved	N/A

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2011-27: Provider Based Assistance (PBA) Program

Approved by HUD: FYE2012

Implemented by HACSM: 11/15/2011

Description of the activity

HACSM implemented a provider-based assistance program, outside the scope of the voucher program. The Provider-Based program was designed with the intention to reach populations in San Mateo County who were under-served or not served by the voucher program or other special-funded programs.

Impact of the activity

In FY17 HACSM selected a fourth provider-based assistance programs to reach an additional underserved population, frail elderly. This new collaboration, with the San Mateo County Health Plan, is targeted to assist those individuals who can live independently with supportive services assistance provided by the Health Plan instead of being placed in a much higher cost skilled nursing facility that is not needed for their health care. The project was selected in late FY17, and is targeted to begin implementation in early FY18. The other three PBA programs serve the following underserved populations: 1) Survivors of domestic violence, 2) Recently released, non-violent parolees, and 3) Single parent households with minor children. The main focus of the first three programs was to support the housing stability of these families. In some cases the housing assistance follows the “Transitional Housing” model with housing provided for a short period of time, up to 18 months. In other cases, the housing assistance is provided for a maximum of 36 months.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
HC#7: Households Assisted by Services that Increase Housing Choice							
Number of households receiving services aimed to increase housing choice (increase)	Est. FY11, Zero (0) households received this type of service prior to implementation of the activity.	HACSM expects that 30 households will receive these services after implementation of the activity.	55 households received these services in FY15	76 households	71 households	Benchmark Achieved	N/A
SS #1: Increase in Household Income							
Average earned income of households (\$)	Average earned income of households affected by this policy prior to implementation was \$0	HACSM expects the average earned income of households affected	In FY15, the actual average earned income of households	\$1,172	\$897.97	Benchmark Achieved	N/A

		by this policy to be \$900	affected by this policy was \$1,032				
SS #3: Increase in Positive Outcomes in Employment Status (Based on Head of Household Information)							
Other: Employment	Number of HOH employed was zero (0)	HACSM expects that 20 HOH will be employed after implementation	In FY15, 38 HOH were employed	52	35	Benchmark Achieved	N/A
	0% of total work-able households were employed	HACSM expects that 25% of the total work-able households will be employed after implementation	In FY15, 73% of work able households were employed	68%	54%	Benchmark achieved	N/A
Enrolled – Job Training	Zero (0) HOH enrolled in a job training program	15 HOH enrolled in job training program after implementation	Actual number of HOH enrolled in job training program: 52	37	65	Benchmark achieved	N/A
	0% of total work-able households enrolled in a job training program	HACSM expects that 25% of the total work-able households will be enrolled in a job training program after implementation	Actual percentage of total work-able households enrolled in a job training program: 100%	100%	100%	Benchmark achieved	N/A
SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)							
Number of households receiving TANF	Zero (0) households receiving TANF prior to implementation	HACSM expects that 20 households will be receiving TANF after implementation	Households were receiving TANF: 7	7 Households	9 Households	Benchmark achieved	N/A

SS #8: Households Transitioned to Self-Sufficiency *							
Number of households transitioned to self-sufficiency	Zero (0) households transitioned to self-sufficiency prior to implementation	** Expected number of households transitioned to self-sufficiency after implementation	** Actual number of households transitioned to self-sufficiency.	** Actual number of households transitioned to self-sufficiency.	** Actual number of households transitioned to self-sufficiency.	Unable to determine	**Participants in this program do not meet the HACSM definition of self-sufficiency therefore HACSM is unable to include this information in the MTW Report.

* The HACSM definition of Self-Sufficiency includes the following:

- The household has reached an income level such that HACSM is no longer providing subsidy on behalf of the family for a period of 90 days

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2013-28: Apply MTW Flexibilities to Public Housing

Approved by HUD: FYE2013

Implemented by HACSM: 7/1/2012

Description of the activity

In FY2013, HACSM received HUD approval to operate El Camino Village (ECV), a 30-unit Public Housing complex, in accordance with several of MTW policies and procedures used for the voucher program.

Following is a list of the areas that HACSM implemented July 1, 2012:

1. Biennial recertification schedule for all elderly and or disabled households.
2. Elimination of the Earned Income Disallowance (EID)
3. Revised Eligibility Standards
4. Exclusion of asset income for households with assets under \$50,000
5. Elimination of the imputed asset calculation and use of the actual interest earned for assets valued at or over \$50,000
6. Simplification of the Third Party Verification Process
7. Modification of the change in head of household policies
8. Biennial inspection schedule
9. Modification of the full-time student status requirements
10. Inclusion of Foster Care, KinGap, and Adoption Assistance payments in the households annual adjusted income, and allowance of a \$480 dependent deduction for each foster child and/or adult

Impact of the activity

This multi-faceted activity has assisted the HACSM goal of increased administrative streamlining. As a result of the activity, HACSM staff have been able to apply the same rules and policies to all program participants resulting in increased customer service and a more timely response to participant and resident needs.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE #1: Agency Cost Savings							
Total cost of task in dollars	The cost to complete this activity: \$2,401	Expected cost of task \$2,161	FY15, the cost to complete this	\$1,400	\$1,207	Benchmark Achieved	N/A

			activity: \$1,354				
CE #2: Staff Time Savings							
Total time to complete the task in staff hours	Total amount of staff time dedicated to the task 42 hours	Expected amount of the total staff time dedicated to the task after implementation: 38 hours	Actual amount of total staff time dedicated to the task 24 hours	22 hours	22 hours	Benchmark Achieved	N/A
CE #3: Decrease in Error Rate of Task Execution							
Average error rate in completing the task as a percentage	Average error rate in completing the task as a percentage	Average error rate in completing the task: 10%	N/A	0%	0%	N/A	N/A
SS #1: Increase in Household Income							
Average earned income of households (\$)	FY13 the average earned income of households: \$26,062	Expected average earned income of households affected by this policy	Actual average earned income: \$31,179	\$38,640	\$38,175	Benchmark achieved	N/A
SS #2: Increase in Household Savings							
Average savings of households (\$)	Average savings per household prior to implementation	Expected savings per household affected by this policy	Actual average savings per household: \$1,811	\$1,624	\$2,391	Benchmark achieved	N/A
SS #3: Increase in Positive Outcomes in Employment Status (Based on Head of Household Information)							
Other: Employment	Number of HOH employed: 22	Expected number of HOH employed: 22	Actual number of HOH employed after implementation: 16	12	15	Benchmark achieved	N/A
	Percentage of total work-able households employed: 81%	Expected percentage of total work-able households employed after implementation: 80%	Actual percentage of total work-able households employed: 94%	80%	71%	Benchmark achieved	N/A

Unemployed	Number of HOH unemployed: 2	Expected number of HOH unemployed after implementation: 2	Actual number of HOH unemployed: 14	18	3	Benchmark achieved	N/A
	Percentage of total work-able households who are unemployed: 8%	Expected percentage of total work-able households who are unemployed after implementation: 5%	Actual percentage of total work-able households who are unemployed full time: 1%	20%	12%	Benchmark achieved	N/A
SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)							
Number of households receiving TANF	Households receiving TANF prior to implementation: 5	Expected number of households receiving TANF after implementation: 5	Actual number of households receiving TANF: 4 Households	3	3	Benchmark achieved	N/A
SS #5: Households Assisted by Services that Increase Self-Sufficiency							
Number of households receiving services aimed to increase self sufficiency	Households receiving self sufficiency services prior to implementation	Expected number of households receiving services after implementation	Actual number of households receiving self sufficiency services: 0	0	0	Benchmark achieved	N/A
SS #6: Reducing Per Unit Subsidy Costs for Participating Households							
Average amount of Section 8 /Section 9 subsidy per household affected by this policy	Average subsidy per household affected by this policy prior to implementation: \$1,123	Expected average subsidy per household affected by this policy after implementation: \$1,123	Actual average subsidy per household: \$1,123	\$44.54	\$31.21	Benchmark achieved	Based on a total of \$11,234 in operating subsidy from HUD, for the 30 units at El Camino Village, for 12 months.
SS #7: Increase in Agency Rental Revenue							
PHA rental revenue (\$)	PHA rental revenue prior to implementation \$239,052	Expected PHA rental revenue after implementation: \$239,052	Actual PHA rental revenue: \$233,528	\$258,286	\$282,309	Benchmark achieved	Based on an average resident rent portion of \$784/month

SS #8: Households Transitioned to Self-Sufficiency							
Number of households transitioned to self-sufficiency	Number of households transitioned to self-sufficiency prior to implementation	Expected number of households transitioned to self-sufficiency after implementation	Actual number of households transitioned to self-sufficiency: 0	Actual number of households transitioned to self-sufficiency: 0	Actual number of households transitioned to self-sufficiency: 0	N/A	Based on the HACSM definition of self-sufficiency, the residents at El Camino Village will likely never qualify as transitioned to self-sufficiency. Instead of exiting the program, must choose to remain in place and pay the "Flat Rent" amount for the unit.

* The HACSM definition of Self-Sufficiency includes the following:

- The household has reached an income level such that HACSM is no longer providing subsidy on behalf of the family for a period of 90 days

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2014-29: Revise Child Care Expense Deduction

Approved by HUD: FYE2014

Implemented by HACSM: 7/1/2013

Description of the activity

In conjunction with HUD regulations, HACSM defines child care expenses as amounts anticipated to be paid by the family for the care of children 12 years of age and under during the period for which annual income is computed, but only where such care is necessary to enable a family member to work, seek work, or go to school (furthering education) and only to the extent such amounts are not reimbursed. The activity applies to HACSM's Public Housing and Section 8 Housing Choice Voucher programs.

The amount deducted shall reflect reasonable charges for child care. When a family member looks for work or furthers his or her education, there is no cap on the amount that may be deducted for child care – although the care costs must still be necessary and reasonable. However, when child care enables a family member to work, the deduction is capped by the amount of employment income that is included in annual income.

HACSM defines allowable child care deductions as follows:

1. The care must be provided for one or more qualifying persons. A qualifying person is a person who is a dependent child, age 12 and under, of a family member who is the parent or legal guardian of the child.
2. The care must be provided to enable the parent or guardian to work, seek work, or attend school full time.
3. The payments for care cannot be paid to the non-custodian parent(s) of the qualifying child.
4. The maximum allowable child care deduction is the lesser of the actual expense or 50% of the gross earnings or net earnings from self-employment of the parent or guardian.
5. If both parents are in the subsidized household, the 50% gross earnings cap will be based on the lower of the two earnings from the parents. One parent may be considered as having earnings if the parent is a full-time student or a person with disabilities that inhibits the parent to care for the child. In this case, the earnings will be based on the working parent.
6. The maximum allowable child care deduction for a parent or guardian who has no earnings but attends school full time will be the lesser of the actual expense paid or \$5000 per year per qualifying child.

Impact of the activity

In FY17, HACSM found that this activity helped to clarify the process for child care expenses resulting in some staff time savings and at the same time provided clarity and greater equity for all program participants. During FY17, this activity resulted in approximately \$3,325 child care expenses that were disregarded due to exceeding the policy limits. There were 199 households that claimed child care expenses for deduction, one household for school attendance, 189 households to work, and eight households to seek work. The average amount per household that was deducted from the household's annual adjusted income was \$5,070.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE #5: Increase In Rental Revenue							
Rental Revenue in dollars	HACSM rental revenue FY13, prior to implementation of the activity, was \$1,653,740	HACSM expected the rental revenue after implementation of the activity to remain constant at approximately \$1,650,000	HACSM rental revenue in FY15, after implementation, was \$1,777,306	\$1,707,628	\$2,207,040	Benchmark achieved	Note: This "rental revenue" is a theoretical amount as it relates to the Housing Authority. The "rental revenue" is the household's "Tenant Rent Portion" that is paid by the tenant directly to the private market landlord, not the Housing Authority.

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2015-30: Standard Proration for Ineligible Household Members

Approved by HUD: FYE2015

Implemented by HACSM: 10/1/2014

Description of the activity

In FY15, HACSM implemented a standard pro-ratio of \$150 per ineligible household member that is subtracted from the total monthly HACSM HAP subsidy for the household. Implementing this activity allowed HACSM to meet the HUD regulation which required that the PHA prorate the HAP portion of the household's subsidy for the eligible household members, while at the same time assisting participants and applicants understand the calculation method for their rent portion and easing the barriers that mixed families were facing in finding and rental an affordable housing unit.

Impact of the activity

Upon implementation of this activity, HACSM staff saw that there were fewer challenges in managing the program for families that included members who were ineligible due to their citizenship status. In FY17, there were 142 mixed families in the program, including a total of 190 individuals who had ineligible citizenship status. Also, "mixed families" experienced some relief in the lease up process. Since implementation, HACSM has not received any hardship requests from participants in relation to this MTW activity in FY17.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE #1: Agency Cost Savings							
Total cost of task in dollars	In FY14, the total cost to complete this task was \$8,674	HACSM expects that the cost to complete this task: \$12,000 (Benchmark updated from \$4,400 to \$12,000, effective FY16)	In FY15, the cost to complete this task was \$4,000	\$10,273	\$8,161	Benchmark achieved	N/A
CE #2: Staff Time Savings							
Total time to complete the task	In FY14, the total time to complete this task	160	In FY15 the time to	159	142	Benchmark achieved	N/A

in staff hours	prior to implementation: 166 hours	Benchmark updated from 83 hours to 160 hours, effective FY16)	complete this task was 77 hours				
CE #3: Decrease in Error Rate of Task Execution							
Average error rate in completing the task as a percentage	Average error rate in completing the task as a percentage	HACSM is establishing this benchmark with the submission of this report at: 5%	Average error rate in completing the task as a percentage: 0%	Average error rate in completing the task as a percentage: 0%	Average error rate in completing the task as a percentage: 0%	Benchmark achieved	N/A
CE #5: Increase In Rental Revenue							
Rental Revenue in dollars	HACSM rental revenue FY13, prior to implementation of the activity, was \$1,653,740	HACSM expected the rental revenue after implementation of the activity to remain constant at approximately \$1,650,000	HACSM rental revenue in FY15 was \$1,777,306	\$1,707,628	\$2,207,040	Benchmark achieved	Note: This "rental revenue" is a theoretical amount as it relates to the Housing Authority. The "rental revenue" is the household's "Tenant Rent Portion" that is paid by the tenant directly to the private market landlord, not the Housing Authority.

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2015-31: Local Referral Process for Supportive Service Exception Units, in Project Based Voucher (PBV) Complexes

Approved by HUD: FYE2015

Implemented by HACSM: 9/2/2014

Description of the activity

Current PBV regulations require the PHA provide applicants to an owner of PBV units from the PHA wait list. In general, this system is efficient and with on-going oversight and communication with PBV owners, HACSM has been able to provide a sufficient number of applicants for an owner to fill vacancies in a timely manner. The one area where this has been problematic has been in supportive service exception units, particularly the larger size exception units. Balancing the overall number of households on the waitlist while at the same time maintaining a sufficient number of households that can most benefit from the services provided for the exception units have proven to be quite challenging and time consuming. In some instances, it requires the opening and closing of the waitlist in order to expand the pool of applicants. This process is also confusing for the applicant households and at times causes delays in the lease up process.

To address this situation, HACSM has implemented a local referral process for supportive service exception units. The process is such that upon notice from an owner that an exception unit has been vacated, HACSM provides applicants to the owner from its waitlist. If HACSM is unable to provide a list of applicants to the project owner within 15 business days, or upon owner screening it is determined that none of the applicants provided by the PHA wait list meet the owner's selection criteria or the applicants subsequently do not meet HACSM eligibility requirements, HACSM will accept direct referrals from the owner for eligibility determination for that exception unit. As always, the owner is required to notify HACSM, in writing, of any rejected applicant including the grounds for the rejection.

Impact of the activity

Upon HUD approval, HACSM implemented this activity in FY15. In FY17, HACSM has not had to use the MTW flexibility. HACSM attributes this to the extremely challenging San Mateo County rental market. Families who reside in PBV exception units, who previously may have asked to exercise their right to relocate with a tenant based (MTW) voucher, simply have not. And for those that have vacated, HACSM had sufficient applicants to fill the vacated units without having to use the MTW flexibility associated with this activity.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
HC#3: Average Applicant time on wait list in months							
Average applicant time on wait list in months	FY15, the baseline is than 48 months	1 month	N/A	N/A	N/A	N/A	N/A

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2015-32: Revised EIV Income Report Review Schedule

Approved by HUD: FYE2015

Implemented by HACSM: 10/1/2014

Description of the activity

Effective January 31, 2010, HUD implemented new regulations mandating the use of EIV as a third party source to verify tenant employment and income information during mandatory certifications. Prior to the issuance of the HUD notice advising agencies of the revision, utilizing the EIV income report for interim certifications was not required by HUD, only during annual reexaminations. The reinterpreted regulations concerning the use of EIV changed the requirement such that review of the EIV income report is now a required component of all certification processes, including interim reexaminations.

The requirement to now use the EIV income report for both annual and interim reexaminations translates to additional staff time expended when processing interim reexaminations, which also renders an increase in costs, linked to the staff time for accessing and reviewing the EIV income report. In an effort to reduce cost and administrative burden, HACSM has modified the EIV review schedule by not generating the EIV income reports during interim reexaminations and only generating the EIV income report during annual or triennial reexaminations.

In concert with this, HACSM's current interim policy allows for certain actions to be processed without having to meet with the family in person. For example, if a family reports a decrease in income, not associated with a family composition change, HACSM requires the family to submit the necessary documents to reflect the change. Based on the family's documentation, HACSM recalculates the tenant and HAP portions accordingly. Not having to access and review the EIV income report at interim recertifications has led to a more efficient process for HACSM staff.

Impact of the activity

Upon implementation HACSM has found that this activity has reduced administrative costs by streamlining the EIV process for staff, without impacting staff's ability to monitor a family's pattern of undisclosed income during the reexamination processes. HACSM feels that it is already on track to meet the proposed benchmark for this activity for residents of the Housing Choice Voucher and Public Housing programs.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE #1: Agency Cost Savings							
Total cost of task in dollars	In FY14, prior to implementation, the cost complete this task was: \$12,749	HACSM expects that the cost to complete this task will be: \$2,560	\$1,380	0	\$2,405	Benchmark achieved	N/A
CE #2: Staff Time Savings							
Total time to complete the task in staff hours	In FY14, it required 244 hours to complete this task	49 Hours	26.5 hours	0	42 hours	Benchmark achieved	N/A
CE #5: Increase In Rental Revenue							
Rental Revenue in dollars	HACSM rental revenue FY13, prior to implementation of the activity, was \$1,653,740	HACSM expected the rental revenue after implementation of the activity to remain constant at approximately \$1,650,000	HACSM rental revenue in FY15 was \$1,777,306	\$1,707,628	\$2,207,040	Benchmark achieved	Note: This "rental revenue" is a theoretical amount as it relates to the Housing Authority. The "rental revenue" is the household's "Tenant Rent Portion" that is paid by the tenant directly to the private market landlord, not the Housing Authority.

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2015-33: Local PBV Inspection Process

Approved by HUD: FYE2015

Implemented by HACSM: 9/2/2014

Description of the activity

Current HUD regulation allows PHAs to inspect a random 20% sample of PBV contract units in a building annually. If 20% of the inspected units fail HQS, PHAs then are required to inspect 100% of the units. Building on the success of the other HQS-related MTW activities, its close working relationship with PBV unit owners, and the quality of its PBV units, HACSM implemented a Local PBV Inspection Process to ensure PBV-owner's compliance with HQS for all units under contract.

The Local PBV Inspection Process takes into account the HACSM biennial inspection schedule for its PBV units. With this activity, HACSM has the additional flexibility to instead choose to inspect 20% of its PBV units in a building annually. As always, if the inspected unit(s) fails HQS and the deficiencies are not corrected within 30 days upon notification to the project owner or the HACSM-approved extension period, HACSM will abate HAP for the unit. If the deficiencies are not corrected within 90 days after the abatement notice, HACSM will remove the unit from the PBV contract and no retroactive HAP will be made during the abatement period.

Impact of the activity

While HACSM implemented this activity immediately upon HUD approval, HACSM has not actively used its authority to only inspect 20% of PBV units in a project in FY17. HACSM has continued to conduct inspections with the Agency's Leasing Team, none of whom are connected with the PBV properties, and an independent contractor.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE #1: Agency Cost Savings							
Total cost of task in dollars	In FY14, it required \$15,570 to complete this task	HACSM expects that the cost to complete this task after implementation to be no more than \$6,218	N/A	N/A	N/A	N/A	N/A

CE #2: Staff Time Savings						
Total time to complete the task in staff hours	In FY14, it required 298 hours to complete this task	HACSM expects that after implementation it will require 119 hours to complete this task	N/A	N/A	N/A	N/A

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2015-35: Leasing Success Program

Approved by HUD: FYE2015

Implemented by HACSM: 10/1/2014

Description of the activity

In FY15, HACSM implemented the use of its its' Broader Use of Funds Authority in order to implement additional programs and activities to increase participation in the MTW program and the utilization of this highly valued housing assistance. According to the National Low Income Housing Coalition's 2014 publication, "Out of Reach," San Mateo County is one of the nation's most expensive jurisdictions in which to live. According to their report, a two bedroom household in the San Francisco metropolitan FMR area, of which San Mateo County is included, would need to have a wage of \$37.62 per hour in order to afford to live here. And, according to the San Mateo County Housing and Community Development Department, in the last year, while the FMR increased by 9% in San Mateo County, the rental market increased over 12% and in the last 4 years, from 2010 to the Third Quarter of 2014, the net change has been an increase of over 50%. For example, as of September 2014 the average market-rate rent for a one-bedroom unit was \$2,352 and for a two-bedroom unit it was \$2,648. Since publication of their report, the averages have continued to climb through the final Quarter of 2014. One additional factor that makes the San Mateo County housing market so challenging is the fact that, on average, the rental occupancy rate continues to remain over 95% in any given month. There simply is a very limited amount of rental housing, let alone affordable rental housing.

With HUD approval HACSM has allocated up to \$250,000 HAP funds annually for the next three years to this activity. Some of the initial activities include the following: 1) Contracting with organizations that have expertise in the rental market, that will assist program applicants and participants with "housing locator services," 2) Contracting with organizations that have substantial experience in shared housing to encourage HCV participation, 3) Creating a landlord incentive program, and 4) Creating a security deposit loan program.

Impact of the activity

In FY17, HACSM continued to collaborate with Abode Housing Services to serve new applicants and relocating participants to find and secure rental housing in San Mateo County. With Abode's facilitation of positive relationships with owners of rental properties, they have been able to assist 55 MTW families, 65% of whom were able to secure housing in the SMC market. HACSM has spent approximately \$114,000 for Abode's housing search and counseling services in support of MTW participants. In addition to Abode's work, MTW funds have also been expended as a result of the landlord incentive program. Through an extended stakeholder process with the SMC community, owners of rental property, apartment association groups, and political leaders, HACSM developed the following three incentives: 1) Landlord Continuity Bonus, 2) New Landlord \$1,000 Bonus, and 3) Landlord "No Loss" Bonus. Since implementation, 118 new

landlords have joined the program, 187 landlords have received the “No Loss Bonus”, 45 Landlords have received a continuity bonus and 24 households have received security deposit assistance.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcomes	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
<i>HC#1 Additional Units of Housing Made Available</i>							
Number of new housing units made available for households at or below 80% AMI	In FY 14, Zero (0) new housing units	HACSM expects 10 new housing units each fiscal year	N/A	13	86	Benchmark achieved	N/A
<i>HC#3 Decrease in Wait List Time</i>							
Average applicant time on waitlist in months	On average, applicants are on the HACSM wait list for 36 months	HACSM expects that applicants will be on the wait list for no more than 24 months	In FY15, the actual average applicant time on wait list was 1.2 months	Approximately 2 months	Approximately 2.3 months	Benchmark achieved	N/A
<i>HC#5 Increase in Resident Mobility</i>							
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity	Zero (0) households	10 households	N/A	58	47	Benchmark achieved	N/A
<i>HC#7 Households Assisted by Services that Increase Housing Choice</i>							
Number of households receiving services aimed to increase housing choice	Zero (0) households	Established in FY16, HACSM expects that an additional 30 households will be served	N/A	65 Households 30 – Abode Assistance 35 – HACSM Renting Success Workshop	322 Households 215 - Abode Assistance 107- HACSM Renting Success Workshops	Benchmark achieved	N/A

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Not Yet Implemented Activities

HACSM does not have any MTW Activities that were approved by HUD, but not yet implemented.

Activities On Hold

HACSM does not have any HUD-approved MTW activities that were never implemented.

Closed Out Activities

Activity #2011-20: Apply Current Payment Standards at Interim Re-examination

Approved by HUD: 7/1/2010

Implemented by HACSM: 7/1/2010

Closed by HACSM: 7/1/2013

Rationale for Closing out the Activity

HACSM has closed out this activity, as over 98% of program participants are now on the Tiered Subsidy Table (MTW Activity # 2010-9) rendering the activity essentially obsolete.

Activity #2000-4: Escrow Accounts

Approved by HUD: FY2010

Implemented by HACSM: 7/1/2009

Closed by HACM: 7/1/2014

Rationale for Closing out the Activity

In FY15, HACSM combined this activity with Activity #2000-1: MTW Five-Year Self-Sufficiency Program as the two activities are integrally linked.

Activity #2012-25: Exclude Asset Income from Calculations for Households with assets under \$50,000

Approved by HUD: FYE2012

Implemented by HACSM: 7/1/2011

Closed by HACSM: 7/1/2016

Rationale for Closing out the Activity

In FY17, HACSM combined this activity with Activity #2010-7: Simplify Rent Calculation Process. HACSM made this determination and decision based on the fact that these two activities were closely aligned and with the implementation of the Standard Metrics, the required tracking results were duplicative.

Activity #2015-34: Local Collections Process

Approved by HUD: FYE2015

Implemented by HACSM: 9/2/2014
Closed by HACSM: 6/30/2017

Rationale for Closing out the Activity

At the conclusion of FY17, the MTW Office informed HACSM that this activity could not continue to be approved due to lack of MTW Authority.

SECTION V

Sources and Uses of Funds

A. MTW Report: Sources and Uses of MTW Funds																			
Actual Sources and Uses of MTW Funding for the Fiscal Year																			
PHAs shall submit their unaudited and audited information in the prescribed FDS format																			
Describe the Activities that Used Only MTW Single Fund Flexibility																			
<p>HACSM has provided a thorough narrative of each activity that used only the Single Fund Flexibility in the body of the Report, including the metrics used to track the outcomes of these programs or activities.</p>																			

B. MTW Report: Local Asset Management Plan																					
Has the PHA allocated costs within statute during the plan										Yes				N/A							
Has the PHA implemented a local asset management plan										N/A		or		No							
If the PHA is implementing a LAMP, it shall be described in an appendix every year beginning with the year it is proposed and																					
Has the PHA provided a LAMP in the appendix?										N/A		or		No							
N/A																					

C. MTW Report: Commitment of Unspent Funds

In the table below, provide planned commitments or obligations of unspent MTW funds at the end of the PHA's fiscal year.

Account	Planned Expenditure	Obligated Funds	Committed
Loans Receivable	Affordable Housing construction funds		1,123,533
Loans Receivable	Affordable Housing construct. funds under contrac	1,927,240	
Expense	Provider Based Assistance	1,413,045	
Expense	Housing Locator Service	133,966	
Total Obligated or Committed Funds:		3,474,251	1,123,533

In the body of the Report, PHAs shall provide, in as much detail as possible, an explanation of plans for future uses of unspent funds, including what funds have been obligated or committed to specific projects.

Note : Written notice of a definition of MTW reserves will be forthcoming. Until HUD issues a methodology for defining reserves, including a definition of obligations and commitments, MTW agencies are not required to complete this section.

SECTION VI

Administrative

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

There have not been any HUD reviews, audits, or physical inspection issues requiring action by HACSM.

Results of latest PHA-directed evaluations of the demonstration

HACSM has not initiated any PHA-directed evaluations of the MTW demonstration program.

Certification of Statutory Requirements

The Housing Authority of the County of San Mateo hereby certifies that it (the Agency) has met the following three statutory requirements:

1. Assuring that at least 75 percent of the families assisted by the Agency are very low-income families;
2. Continuing to assist substantially the same total number of eligible low-income families as would have been served had the amounts not be combined;
and
3. Maintaining a comparable mix of families (by family size) is served, as would have been provided had those amounts not been used under the demonstration


Housing Authority of the County of San Mateo
PHA Name

CA014
PHA Number/HA Code

I hereby certify that all the information stated herein is true and accurate. Warning: HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012, 31 U.S.C. 3729, 3802)

Ken Cole
Name of Authorized Official

Executive Director
Title


Signature

9-28-17
Date

Appendix I

HACSM Hardship Policy

The HACSM Hardship Policy is designed to address:

A. Rent reform initiatives

- *Tiered Subsidy Table Activity*
- *Payment Standard Activity*
- *Full Time Student Activity*
- *Foster Care, KinGap, and Adoption Assistance Activity*
- *Earned Income Disallowance*
- *Minimum Tenant Rent*

B. Time limited assistance

- *Extension of Program Participation*
- *Portability (Moving out of San Mateo County)*
 - *Current Program Participants*
 - *New Program Applicants*

C. Portability

All hardship requests must be made in writing, stating both the reason for the hardship and the expected duration.

Each request will be reviewed and weighed against other local resources available to the family. The result of the review may consist in referral to other local resources, an adjustment in the portion of the family's rent, or an extension in the length of subsidy assistance given.

A. Rent Reform

- **Tiered Subsidy Table**

In order to qualify for hardship exemptions, households must meet all of the criteria listed below:

1. The household is in compliance with all the program rules and regulations.
2. The household does not owe HACSM any money or is current with a re-payment agreement.
3. The household must be admitted to the program prior to March 1, 2010, unless the household is a resident of HACSM public housing, converting to the Project-Based Voucher (PBV) program and remaining in-place at the complex.
4. The household has not relocated on or after March 1, 2010.
5. The household must experience an increase of \$25.00 or more in rent as a direct result of the MTW rent reform initiatives.
6. The household requested the hardship waiver within the deadline set by HACSM. Households have 10 business days from the date of their "Notice of Change" letter in which to request an Informal Hearing and/or Hardship Review.
7. The household has not received a rent reform hardship relief for tiered subsidy calculation previously.

- **Payment Standards Application at Interim**

Note: This Hardship policy does not apply to Payment Standard Changes at Annual or Biennial Recertifications

In order to qualify for hardship exemptions, households must meet all of the criteria listed below:

1. The household is in compliance with all the program rules and regulations.
2. The household does not owe HACSM any money or is current with a re-payment agreement.
3. The household must be admitted to the program prior to July 1, 2010.
4. The household has not relocated on or after July 1, 2010.

5. The household must experience an increase of \$25.00 or more in rent as a direct result of the MTW rent reform initiatives.
6. The household requested the hardship waiver within the deadline set by HACSM. Households have 10 business days from the date of their "Notice of Change" letter in which to request an Informal Hearing and/or Hardship Review.
7. The household has not received a rent reform hardship relief for the Payment Standards application at interim recertification previously.

- **Full Time Students (FTS)**

In order to qualify for hardship exemptions, households must meet all of the criteria listed below:

1. The household is in compliance with all the program rules and regulations.
2. The household does not owe HACSM any money or is current with a re-payment agreement.
3. The household must be admitted to and have a household member with FTS in their household prior to July 1, 2011.
4. The FTS status must be established at the last annual or interim recertification prior to July 1, 2011.
5. The household must experience an increase of \$25.00 or more in rent as a direct result of the MTW rent reform initiatives.
6. The household requested the hardship waiver within the deadline set by HACSM. Households have 10 business days from the date of their "Notice of Change" letter in which to request an Informal Hearing and/or Hardship Review.
7. The household has not received a rent reform hardship relief for full time student's income inclusion previously.

- **Foster Care, KinGap and Adoption Assistance**

In order to qualify for hardship exemptions, households must meet all of the criteria listed below:

1. The household is in compliance with all the program rules and regulations.
2. The household does not owe HACSM any money or is current with a re-payment agreement.
3. The household must be admitted to the program and have the foster child/adult in their household prior to July 1, 2011.

4. The Foster Child/Adult status of the household member must be established at the last annual or interim recertification prior to July 1, 2011.
5. The household must experience an increase of \$25.00 or more in rent as a direct result of the MTW rent reform initiatives.
6. The household requested the hardship waiver within the deadline set by HACSM. Households have 10 business days from the date of their "Notice of Change" letter in which to request an Informal Hearing and/or Hardship Review.
7. The household has not received a rent reform hardship relief for Foster Care, KinGap, or Adoption Assistance income inclusion previously.

- **Earned Income Disallowance**

In order to qualify for hardship exemptions, households must meet all of the criteria listed below:

1. The household is in compliance with all the program rules and regulations.
2. The household does not owe HACSM any money or is current with a re-payment agreement.
3. The household must be admitted to the program and received the benefits of Earned Income Disallowance in rent calculation prior to July 1, 2012.
4. The Earned Income Disallowance status of the household member must be established at the last annual or interim recertification prior to July 1, 2012.
5. The household must experience an increase of \$25.00 or more in rent as a direct result of the MTW rent reform initiatives.
6. The household requested the hardship waiver within the deadline set by HACSM. Households have 10 business days from the date of their "Notice of Change" letter in which to request an Informal Hearing and/or Hardship Review.
7. The household has not received a rent reform hardship relief for Earned Income Disallowance previously.

- **Child Care Expense Deduction**

In order to qualify for hardship exemptions, households must meet all of the criteria listed below:

1. The household is in compliance with all program rules and regulations.
2. The household does not owe HACSM any money or is current with a repayment agreement.
3. The household must be admitted to the program and received the benefits of the Child Care Expense Deduction in rent calculation prior to July 1, 2013.

4. The Child Care Expense Deduction status of the household member must be established at the last annual or interim recertification prior to July 1, 2013.
5. The household must experience an increase of \$25.00 or more in rent as a direct result of the MTW rent reform initiatives.
6. The household requested the hardship waiver within the deadline set by HACSM. Households have 10 business days from the date of their "Notice of Change" letter in which to request an Informal Hearing and/or Hardship Review.
7. The household has not previously received a rent reform hardship relief for the Child Care Expense Deduction.

Approval Process for all Rent Reform Initiatives

- Households who meet the criteria listed above may mail, fax, or e-mail their request to HACSM.
- Housing Programs Specialist will review the request promptly, using the HACSM provided tool, calculate the tenant rent and forward the result and the tenant file to the supervisor.
- Supervisor approves the new rent if there are no other issues. If there are other issues, the supervisor will conduct further review and consult with Housing Rental Programs Manager.

Hardship Relief for all of the above Rent Reform Initiatives

Households who qualify and receive waiver approval may pay their portion of rent based on the calculation under HUD regulations until their next recertification or relocation. At the next annual recertification, biennial recertification, or relocation, whichever comes first, the household will automatically be subject to the rent reform initiatives.

Note: Each household is only eligible for one term of relief for each rent reform initiative and if the household qualifies for more than one relief at any given recertification (annual or interim), the reliefs will be calculated concurrently.

B. Time Limited Assistance - *Extension of program participation*

- **Basic Requirements**

1. The household is in compliance with all program rules and regulations.
2. The household does not owe the HACSM any money or is current with a repayment agreement.

- **Qualification**

1. The Head of Household and all the adult (18 and over) household members are 62 years of age or older and/or people with disabilities. (The HUD definition of disability shall apply)
2. The Head of Household is the sole adult member who is responsible to care for a minor (under 18) household member who is a person with disability. (The HUD definition of disability shall apply).
3. "Tight Rental Market." In order to qualify, all four of the following thresholds must be met:
 - a. At the time of program exit, the average vacancy rate in San Mateo County for affordable units is less than 4% during the previous 6-month period, **and**
 - b. The HCV utilization rate is below 95%, and
 - c. The family's annual gross income is below 80% of AMI, and
 - d. The family agrees to actively participate in the Self Sufficiency case management services.
4. The household is actively engaging in educational or vocational activities per the initial or subsequent revised service plan. The activities on a revised service plan must be approved by HACSM or the case manager at least 12 months prior to the program exit date.

- **Approval Process for Extension of Program Participation**

1. All applications will be reviewed for completeness.
2. Households who meet qualification category number 4 above must list on the Hardship Application the following:
 - a. Educational or vocational activities that the household is currently engaging in; and
 - b. The name of the school/institution/agency that provides the service; and
 - c. The expected completion date; and
 - d. A brief statement on how the extension of assistance would benefit the household in achieving its self-sufficiency goal.

3. The Family Self-Sufficiency Coordinator will review the request promptly and forward the file to the supervisor with his/her recommendation.
4. The Supervisor approves the extension if there are no other issues.

- **Hardship Relief for Extension of Program Participation**

1. For households who meet qualification category number 1 and 2, the length of assistance may be extended for an additional 12 months. Any subsequent renewals on the extension will require a new request from the household and will be subject to the HACSM hardship policy in effect at that time.
2. For households who meet qualification category number 3 and 4, HACSM will grant a 12-month extension, with the possibility of a second 12-month extension if the “tight rental market” condition persists.
3. For households who meet qualification number 4, the length of assistance may be extended for a maximum of 12 months, and is subject to compliance to case management services and acceptable verification of educational or vocational activities listed in the hardship application.

Note: For Qualification Categories #3 and #4, the total combined extension period cannot exceed 24 months total.

4. Decisions reached by HACSM will be final.

C. Portability (Moving out of San Mateo County)

Current Program Participant and New Voucher holders who have county resident status and have not leased up

“Current Participant” means a voucher holder has secured and leased a unit that they are living in within San Mateo County and have met all lease obligations.

- **Basic Requirements**

1. The household is in compliance with all program rules and regulations.
2. The household does not owe the HACSM any money or is current with a repayment agreement.

- **Qualifications** (The household must meet one of the following)

1. The Head of Household and all the adult (18 and over) household members are 62 years of age or older and/or people with disabilities. (The HUD definition of disability

shall apply).

2. The Head of Household is the sole adult member who is responsible to care for a minor (under 18) household member who is a person with disability. (The HUD definition of disability shall apply).
 3. The Head of Household, Co-head, or Spouse has secured full-time employment of at least 32 hours/week and said employer's, or job location, is greater than 35 miles beyond the San Mateo County border and the voucher has a minimum of 18 months remaining term of assistance.
 4. The Head of Household, Co-head, or Spouse are full-time students at an accredited educational institution that is located more than 35 miles beyond the San Mateo County border and the voucher has a minimum of 18 months remaining term of assistance.
 5. The receiving Housing Authority is absorbing the household.
- **Approval Process for Portability (Moving out of San Mateo County)**
 1. All applications will be reviewed for completeness.
 2. Households who meet qualification number 3 must provide proof of the following:
 - Employment. Written verification must include the employer's name, the position title, the number of hours to be worked per week and the rate of pay.
 - The physical address of the employer and the address of the job location.
 - Written verification from the receiving Housing Authority that they agree and acknowledge that HACSM's MTW voucher is for a term of five (5) years and that HACSM will not make any payments beyond the fifth year.
 3. Households who meet qualification number 4 must provide proof of the following:
 - Enrollment and attendance record at an accredited institution.
 - The location of the accredited institution's street address.
 - Written verification from the receiving Housing Authority that they agree and acknowledge that HACSM's MTW voucher is for a term of five (5) years and that HACSM will not make any payments beyond the fifth year.
 4. The Family Self-Sufficiency Coordinator will review the request promptly and forward the file to the supervisor with his/her recommendation.
 5. The Supervisor will determine whether or not the hardship request is approved.

** Note: The five-year term of assistance begins upon initial lease up, thus if a household is approved for portability after the initial 12 months or greater, they may only be eligible for assistance for the remaining voucher term, not an additional five years..*

- **Hardship Relief for Portability (Moving Out of San Mateo County)**

1. For households who meet qualification numbers 1 or 2, the Housing Authority may approve the household's request for portability.
2. For households who meet qualification numbers 3 or 4, the Housing Authority may approve the household's request for portability, with the length of assistance to be no more than a maximum term of five (5) years, less any term of participation already completed.
3. For households who meet qualification number 5, the Housing Authority will approve the household's request for portability.

Decisions reached by HACSM will be final.

New voucher holders (Households who have not yet leased a unit in San Mateo County) from MTW Wait List who do not have county status

Note: Per the Housing Authority's Administrative Plan, applicants who do not have county preference at the time of eligibility determination are required to initially lease in San Mateo County for a period of no less than 12 months, unless Reasonable Accommodation (RA) has been approved.

- **Basic Requirements**

1. The household has been determined eligible for the program.
2. The household has attended a briefing and is within the eligible voucher term

- **Qualifications** (The household must meet one of the following)

1. The Head of Household and all the adult (18 and over) household members are 62 years of age or older and/or people with disabilities (the HUD definition of disability shall apply), and the household has completed the Reasonable Accommodation (RA) process and a nexus has been established.
2. The Head of Household is the sole adult member who is responsible to care for a minor (under 18) household member who is a person with disability (the HUD

definition of disability shall apply) and the household has completed the Reasonable accommodation (RA) process and a nexus has been established.

- **Approval Process for Portability (Moving out of San Mateo County)**

1. All applications will be reviewed for completeness.
2. The RA will be reviewed for completeness and nexus determination approval.
3. The Housing Specialist will review the request promptly and forward their recommendation to the supervisor with his/her recommendation.
4. The Supervisor will review the request and determine whether or not the hardship request is approved.

- **Hardship Relief for Portability (Moving Out of San Mateo County)**

1. For households who meet qualification number 1, the Housing Authority may approve the household's request for portability.
2. For households who meet qualification number 2, the Housing Authority may approve the household's request for portability.
3. For households who require reasonable accommodation and a nexus is established, the Housing Authority will approve the household's request for portability.

Decisions reached by HACSM will be final.