

**HOUSING AUTHORITY
OF THE COUNTY OF SAN MATEO**

**MOVING TO WORK
ANNUAL REPORT FY2018**



Submitted to HUD – September 27, 2018

**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. And, it provides the framework which undergirds the Housing Authority of the County of San Mateo's (HACSM) commitment to increasing the affordable housing choices for families, the continual expansion and promotion of economic self-sufficiency for program participants, and the on-going development greater administrative efficiencies throughout the agency.

HACSM has now completed its 18th year in the MTW program. With the lessons learned, the successes realized, and 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. In addition to the MTW program, HACSM continued to actively participate 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, FY2018 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 and on-going housing crisis in the San Francisco Bay Area, and 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 efforts to support the affordable housing goals 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 a 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 all 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 162 new landlords. One such landlord stated, “Wow, that makes a big difference” in the initial stages of the program.

Following are examples from FY2018 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 FY18, in addition to the outreach efforts of Abode Services and the HACSM Inspections Team, HACSM, in collaboration with the Housing and Community Development Department, 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.

During FY18 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, were key stakeholders 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 K funds as seed money, as well as awarding HCV Project-based Vouchers to help developers in financing their projects. Due to the extremely challenging housing market, this strategy has been essential to the increase of affordable housing in the community.

In previous MTW Annual Plans, HACSM proposed and HUD approved HACSM's request to increase its PBV budget authority. Based on HUD's approval HACSM can PBV up to 35% of its Section 8/MTW budget authority. As further described in this MTW Report, this is one of the most dependable methods to secure long-term affordability for rental units in the housing market.

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. On the following pages are pictures and a short description of new construction/substantial rehabilitation projects that were completed in FY18.

University Avenue Senior Apartments (MidPen Housing Corporation)

Located in East Palo Alto, MidPen and EPA CANDO completed construction on the new, 40-unit University Avenue Senior Apartments in July 2017. All 40 units have been leased.

This affordable housing project was a collaboration between San Mateo County, HOME funds and the Department of Housing's Affordable Housing fund (MTW Activity# 2012-26). Through the MTW Activity, the Housing Authority leveraged \$1.585 million from previously unused HAP funds, in addition to assistance for site acquisition from the HOME Program totaling \$721,250. The now completed project provided a total of 41 apartments - 40 apartments for seniors and one manager's unit.



Mosaic Gardens (MidPen Housing Corporation)

Located in Redwood City, CA, Mosaic Gardens, formerly Atherton Court, was purchased with Affordable Rental Housing Preservation Program (ARHPP) funds from the County of San Mateo. The ARHPP also provided funding to assist with rehab activities. Rehabilitation is currently in progress, with Phase 1 completion expected by the end of 2018. The Housing Authority also awarded Project Based vouchers to the project to also ensure long-term affordable units are maintained for San Mateo County. In total, Mosaic Gardens will have 55 affordable units, on-site supportive services, and a resident manager.

Prior to rehabilitation, participants from a variety of subsidized programs resided at the property, including MTW, Housing Readiness (MTW Activity #2009:2, designed to provide five-seven years of housing assistance combined with self-sufficiency support to formerly homeless households), VASH, and Permanent Supportive Housing families. These households were relocated by the property owner during constructions and will have the first option to return once construction is completed.



Colma Veterans Housing (Mercy Housing)

Located in Colma, CA, Mercy Housing is currently constructing a new property that will include 65 units for homeless veterans and veteran families.

The Housing Authority is leveraging \$3.3 million from the Affordable Housing Fund (MTW Activity# 2012-26), and \$1.2 million from FY 2016-17 HOME Investment Partnership Program funds from HUD.

When finished this property will provide critical housing for the two Veterans Administration Medical Centers located and providing services to San Mateo County veterans: 1) The San Francisco VA Medical Center, offices in San Bruno, CA, and 2) the Palo Alto VA Medical Center campus located in Menlo Park, CA.

Mercy Housing is targeting that construction will be completed in the Spring of 2019 and the Housing Authority is collaborating with both Veterans Administrations to ensure that veteran households have completed the VASH eligibility and property requirements and are ready to move



in as soon as construction is completed. HACSM, the VA's and the SMC Center on Homelessness are also collaborating for other homeless veterans and their families in SMC to be eligible for homeless designed units that do not require VASH eligibility.

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 FY18, 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 "disqualify" 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 FY2018, 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 in a focused, more personal way, 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. In FY18, for example, HACSM and the SMC Credit Union collaborated to provide an on-line option for the financial education portion of participant's Self Sufficiency Goal plan. This free on-line tool has already increased the number of families and individuals to complete this goal and start to save. 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 ninth year of its rent-reform program known as the Tiered Subsidy Table (TST) 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 FY18.

In FY18, HACSM continued the expansion of its five-year, MTW Self-Sufficiency program. In FY18, 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 2017, HACSM hosted its 5th 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 community partners ranging from San Mateo Credit Union, Peninsula Works, JobTrain, Wells Fargo, ReMax, CivicCorps, Voter Registration, to the Employment Development Department, and the Human Services Agency Nutrition Program. Over 130 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. 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 2017, 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 executed in early FY18.

In FY18 the partnerships established 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 three success stories from the PBA Programs. The first is from Service League and the second and third are from HIP Housing, shared with the Housing Authority in FY18. As you will see, these examples clearly demonstrate the profound difference the PBA program has made in the lives of the participants in this unique Agency-designed program.

Conner is just one of the many lucky PBA recipients who had the opportunity to turn his life around while he lived in safe and affordable housing. Before he went to jail he was an unemployed welder and homeless and would have continued to be homeless upon release from jail if it not had been for this program. He was referred to the Service League of San Mateo County before he completed his sentence and was accepted into the PBA program so he did not have to spend another day on the street.*

During his 11 months stay in our Hope House Transitional Housing Program (PBA), Conner followed the rules and became a role-model for the newer men who entered our program. He attended 12-step meetings and our weekly house meeting and stayed humble and grateful as he worked at regaining what he had lost. He started working part- time at a county program earning \$12.00 per hour. After working in their warehouse for 6 months, Conner was offered a full-time job, paying \$20/hr. with a well-established welding company in San Mateo County.

Conner was also in the process of mending a strained relationship with his 4-year old son, so on his free time we did his best to visit with him and to rebuild his life. He knew that having a place where his son could eventually visit and stay with him would be a necessary step to strengthen the relationship. Conner took advantage of the PBA savings program and saved the maximum that he could each month and once he graduated was so grateful to have doubled his investment for move out.

Conner kept his sobriety going strong and met with his sponsor regularly. He joined a clean and sober motorcycle club which proved to not only be fun but also provided a strong support system. He now has a group of clean and sober men that help him overcome daily challenges and to stay on a healthy path. He continues to volunteer in the community which helps others and helps him stay humble. Conner's past friends that lived a negative lifestyle have been replaced with a positive group of guys that are in recovery and do a lot to give back to others. Conner now has a sense of satisfaction that he says he never felt before.

Conner was not a stranger to living behind the walls of jails and prisons. It was a life he had become accustomed to. During his stay in transitional housing Conner was living a simple, honest, and crime free life. He was able to get off of probation and was so proud to show our staff the letter that stated he no longer had a number in the prison system. Without a safe and clean place to live, we don't think this would have been possible.

In May of this year Conner gave us the fantastic news that he found a room to rent in a safe house and gave his 30-day notice. He was looking forward to collecting his PBA savings match check at the end of the 30 days which allowed him to make this positive move. He thanked us for this support and we thank you for being able to provide such a life raft for him.

Monica (Hip Housing SHARE Program, San Carlos home)

Monica was a single mom, with a teenage daughter. When Monica joined our program in 2015 she was earning minimum wage (\$11/hr), had no driver license or car, no savings and a low credit score. She and her daughter were living in poor housing conditions, however, she had been actively maintaining her sobriety from a prior substance abuse addiction and we wanted to help both her and her daughter.

During her participation in our SHARE Program, Monica completed her AA degree in Social Science & Addiction Studies with a certification in Co-Occurring Disorders. She also became a licensed substance abuse treatment counselor. She obtained a job at El Centro starting out as an intern making \$15/hr and worked her way up to Program Manager, Counselor and Facilitator of groups, making \$21/hr. She also completed the following: 1) She paid off prior debts, 2) She was able to get her driver's license back, 3) She was able to purchase a car, 4) She increased her credit score over 120 points, 5) She saved over \$5000, 6) She opened a retirement account, and 7) She is continuing her education to complete her BA degree in Social Work. Monica was able to stabilize her housing and her goal now is to work with families who have been in her shoes and give back to the community.

Rocsana Enriquez (HIP Housing SHARE, Redwood City home)

Rocana was single mom with two children, ages 6 & 7, when she joined the SHARE Program. At that time, Rocsana's future seemed bleak. She was a formerly incarcerated youth with minimum wage earnings, no savings, poor housing conditions, and little education.

Within three years on the SHARE program, Rocsana had completed her AA degree in Administration of Justice. During that same time, she also accomplished the following: 1) She became certified Yoga instructor, 2) She was employed by the Art of Yoga project to teach Yoga to incarcerated youth, 3) She saved over \$5000, 4) She established a retirement account, 5) She opened a savings account for her children, and 6) She became a parent leader at her children's school. She truly turned her life around.

We are still working with Rocsana, and have extended her program beyond the typical three years. She has now successfully completed her BA degree in Justice Studies with a Minor Public Policy & Public Administration. She also co-founded and is the Chair of the Trauma Transformed Advisory Council. She actively volunteers at the Bay Area Justice Corps as a legal assistant in San Mateo County Family Law Self facilitators Office and is preparing to apply to Law School in the Fall of 2019. Her dream now is to become a lawyer and work on improving the educational system for school age children.

We are so proud of all that Rocsana and her children have accomplished.

Recently her friend did a short film on her story that won an award at a festival in the East Coast. Here is the link to her story: <https://www.newsy.com/stories/roxana-trauma-in-the-system> "The short documentary follows Rocsana's visit to a juvenile detention center where she was once incarcerated, returning this time as a trained therapist. Through an intimate look into the lives of incarcerated youth, Rocsana shows the consequences of childhood trauma."

SECTION II

General Housing Authority Operating Information

Housing Stock Information

Actual New Project Based Vouchers

PROPERTY NAME	NUMBER OF VOUCHERS NEWLY PROJECT-BASED		STATUS AT END OF PLAN YEAR**	RAD?	DESCRIPTION OF PROJECT
	Planned*	Actual			
Colma Veterans Housing	65	65	Committed	No	Colma Veterans Housing is a 66-unit new construction development in Colma, CA. With the exception of the manager unit, all 65 rental units will be assisted with PBV subsidy with 58 HUD-VASH PBVs and 7 Section 8 PBVs. Currently under construction.
Miller Avenue Senior Housing	8	8	Committed	No	Miller Avenue Senior Housing is an 81-unit new construction senior housing project located in South San Francisco, CA. 8 units will be assisted with PBV subsidy serving dually eligible (Medicaid, Health Plan of San Mateo) seniors who are (1) reside in long-term care settings who could transition to lower levels of care; (2) about to be discharged from acute care hospital stays and need long term services and supports; (3) living independently but at risk of

					admission to a long-term care facility. Support services will be provided by Health Plan of San Mateo and its network of service providers. Currently under construction.
Mosaic Garden	44	39	Committed	No	Mosaic Garden is a 55-unit rehabilitation development in Redwood City, CA. HACSM has committed 8 HUD-VASH Vouchers, awarded through HACSM's application to HUD's FY2016 HUD-VASH PBV set-aside and 36 Section PBVs to the project. Of the 36 Section 8 PBV units, 9 are supportive housing units with homeless preference serving individuals from the San Mateo County Coordinated Entry System. The rehabilitation will be done in two phases. Currently Phase I is under rehabilitation.
El Camino Village		30	Leased	Yes	El Camino Village was formerly a Public Housing Property. The RAD PB application was finalized December 1, 2017 and all units were transitioned to RAD PB status.
To Be Determined	350		Committed		See below.
423		142	Planned/Actual Total Vouchers Newly Project-Based		

* Figures in the "Planned" column should match the corresponding Annual MTW Plan.

** Select "Status at the End of Plan Year" from: Committed, Leased/Issued

Please describe differences between the Planned and Actual Number of Vouchers Newly Project-Based:

In the FY18 Annual Plan, HACSM stated that it had issued an RFP for 275 HCV and 75 HUD-VASH project-based units. The 75 HUD-VASH vouchers were awarded by HUD as a result of HACSM's application to HUD FY2016 HUD-VASH project-based set aside.

As noted above, construction has begun on the Colma Veterans Housing Project and the Miller Avenue Senior Housing projects. In addition to the above, from the 350 Project Based Vouchers, to be determined, HACSM also awarded and signed an AHAP for the 44 Project-Based vouchers to Mosaic Garden, a 55-unit rehabilitation development.

HACSM also finalized the RAD PB application and received HUD approval effective December 2017 for El Camino Village, a former Public Housing property in Daly City. HACSM had not included El Camino Village previously in its' MTW Annual Plan under the RAD PB designation.

HACSM has also entered into commitments with developers for the following projects as a result of an RFP process:

1) 46 PBV were awarded to Bay Meadows Affordable. Bay Meadows Affordable is a 68-unit new construction development in San Mateo, CA. HACSM has committed 12 HUD-VASH Vouchers, awarded through HACSM's application to HUD's FY2016 HUD-VASH PBV set-aside and 34 Section 8 PBVs to the project. The project developer is in the process of securing financing for the project.

2) 2821 El Camino Real was awarded 59 PBV. 2821 is a 65-unit new construction development in Redwood City, CA. HACSM has committed 27 HUD-VASH Vouchers, awarded through HACSM's application to HUD's FY2016 HUD-VASH PBV set-aside and 32 Section 8 PBVs to the project. Of the 32 Section 8 PBV units, 6 will serve Mental Health Service Act-eligible households. The project developer is in the process of securing financing for the project.

3) Bradford Senior Housing was awarded 99 PBV. Bradford Senior Housing is an 117-unit new construction senior development in Redwood City, CA. HACSM has committed 10 HUD-VASH Vouchers, awarded through HACSM's application to HUD's FY2016 HUD-VASH PBV set-aside and 89 Section 8 PBVs to the project. The project developer is in the process of securing financing for the project.

4) Bayshore Affordable Housing was awarded 18 HUD-VASH PBV. Bayshore Affordable is an 80-unit new construction development in Millbrae, CA. HACSM has committed 18 HUD-VASH Vouchers, awarded through HACSM's application to HUD's FY2016 HUD-VASH PBV set-aside. The project is currently at the planning stage with City of Millbrae.

5) 1283 Willow Road, was awarded 8 PBV for family units. 1283 Willow Road is a 27-unit new construction development in Menlo Park, CA. HACSM has committed 8 Section 8 PBVs to the project. The project is currently at the planning stage with City of Menlo Park.

Actual Existing Project Based Vouchers

PROPERTY NAME	NUMBER OF PROJECT-BASED VOUCHERS		STATUS AT END OF PLAN YEAR**	RAD?	DESCRIPTION OF PROJECT
	Planned*	Actual			
636 El Camino	N/A	47	Leased/Issued	No	A family property, including 20 MHSA units, located in South San Francisco
Alma Point	N/A	33	Leased/Issued	No	A senior property located in Foster City
Coastside Senior Housing	N/A	39	Leased/Issued	No	A senior property located in Half Moon Bay
Delaware Place	N/A	16	Leased/Issued	No	A family property, located in San Mateo
Delaware Pacific	N/A	30	Leased/Issued	No	A family property, including 10 MHSA units, located in San Mateo
Edgewater Isle	N/A	91	Leased/Issued	No	A senior property, located in San Mateo
Gateway Apartments	N/A	81	Leased/Issued	No	A family property, formerly Mod Rehab, located in Menlo Park
Half Moon Village	N/A	114	Leased/Issued	No	A senior property, located in Half Moon Bay
Hillside Terrace	N/A	18			A family property, located in Daly City
Magnolia Plaza	N/A	48	Leased/Issued	No	A senior property, located in South San Francisco
Midway Village	N/A	150	Leased/Issued	No	A formerly Public Housing family project, located in Daly City
Newell Housing	N/A	10	Leased/Issued	No	A family property, located in East Palo Alto
Ocenview	N/A	31	Leased/Issued	No	A senior property, located in

					Pacifica
Pacific Oaks	N/A	50	Leased/Issued	No	A senior property, located in Pacifica
Redwood Oaks	N/A	33	Leased/Issued	No	A family property, located in Redwood City
Sequoia Belle Haven	N/A	69	Leased/Issued	No	A senior property, located in Menlo Park
St. Matthew	N/A	18	Leased/Issued	No	A family property, located in San Mateo
Sweeney Lane	N/A	26	Leased/Issued	No	A family property, located in Daly City
Willow Terrace	N/A	11	Leased/Issued	No	A family property, located in Menlo Park
The Woodlands	N/A	13	Leased/Issued	No	A family property, located in East Palo Alto
N/A		928	Planned/Actual Total Existing Project-Based Vouchers		

* Figures and text in the "Planned" column should match the corresponding Annual MTW Plan.

** Select "Status at the End of Plan Year" from: Committed, Leased/Issued

Please describe differences between the Planned and Actual Existing Number of Vouchers Project-Based:

N/A

Actual Other Changes to MTW Housing Stock in the Plan Year

ACTUAL OTHER CHANGES TO MTW HOUSING STOCK IN THE PLAN YEAR
N/A

General Description of All Actual Capital Expenditures During the Plan Year

GENERAL DESCRIPTION OF ALL ACTUAL CAPITAL EXPENDITURES DURING THE PLAN YEAR

The HACSM Capital Fund grant is generated by a very small Public Housing Inventory. For FY18, HACSM received \$5,270 in Operating Subsidy and \$31,459 in Capital Funds for El Camino Village (Development #CA014000004). Additionally, we received \$243,495 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.

Leasing Information

Actual Number of Households Served

Snapshot and unit month information on the number of households the MTW PHA actually served at the end of the Plan Year.

NUMBER OF HOUSEHOLDS SERVED THROUGH:	NUMBER OF UNIT MONTHS OCCUPIED/LEASED*		NUMBER OF HOUSEHOLDS SERVED**	
	Planned^^	Actual	Planned^^	Actual
MTW Public Housing Units Leased	360	150	30	0
MTW Housing Choice Vouchers (HCV) Utilized	51,708	49,268	4,309	4,106
Local, Non-Traditional: Tenant-Based	408	360	34	30
Local, Non-Traditional: Property-Based	264	648	22	54
Local, Non-Traditional: Homeownership	#	#	0	0
Planned/Actual Totals	52,740	50,426	4,395	4,190

* "Planned Number of Unit Months Occupied/Leased" is the total number of months the MTW PHA planned to have leased/occupied in each category throughout the full Plan Year (as shown in the Annual MTW Plan).

** "Planned Number of Households to be Served" is calculated by dividing the "Planned Number of Unit Months Occupied/Leased" by the number of months in the Plan Year (as shown in the Annual MTW Plan).

^^ Figures and text in the "Planned" column should match the corresponding Annual MTW Plan.

Please describe any differences between the planned and actual households served:

HACSM completed a RAD PV conversion for El Camino Village, formerly a 30-unit Public Housing complex.

LOCAL, NON-TRADITIONAL CATEGORY	MTW ACTIVITY NAME/NUMBER	NUMBER OF UNIT MONTHS OCCUPIED/LEASED*		NUMBER OF HOUSEHOLDS TO BE SERVED*	
		Planned^^	Actual	Planned^^	Actual
Tenant-Based	Provider Based Assistance Program / Activity #2011-27	408	360	34	30
Property-Based	Provider Based Assistance Program / Activity #2011-27	264	648	22	54
Homeownership	N/A	0	0	0	0
Planned/Actual Totals		672	1008	56	84

* The sum of the figures provided should match the totals provided for each Local, Non-Traditional category in the previous table. Figures should be given by individual activity. Multiple entries may be made for each category if applicable.

^^ Figures and text in the "Planned" column should match the corresponding Annual MTW Plan.

HOUSEHOLDS RECEIVING LOCAL, NON-TRADITIONAL SERVICES ONLY	AVERAGE NUMBER OF HOUSEHOLDS PER MONTH	TOTAL NUMBER OF HOUSEHOLDS IN THE PLAN YEAR
N/A	N/A	N/A

Discussion of Any Actual Issues/Solutions Related to Leasing

Discussion of any actual issues and solutions utilized in the MTW housing programs listed.

HOUSING PROGRAM	DESCRIPTION OF ACTUAL LEASING ISSUES AND SOLUTIONS
MTW Public Housing	N/A
MTW Housing Choice Voucher	<p>Residents of San Mateo county continue to experience an extremely tight rental market and outrageously high unit rents. One of the persistent challenges is that voucher holders have to compete with high paid technology and biotech workers within the same limited market. To address this situation, HACSM has increased its project-based voucher allocation to secure long term affordability, has collaborated with affordable housing developers, and private market landlords.</p> <p>In August 2017, HACSM increased the subsidy amounts to all bedroom sizes for voucher holders on its tiered subsidy table. HACSM has also internally developed a Renting Success Workshop, free to all voucher holder and conducted by HACSM staff to assist them in their housing search. And, HACSM renegotiated a contract with Abode Services to assist, upon referral, new applicants and relocating participants in their housing search.</p>
Local, Non-Traditional	<p>Providers in the Local Non-Traditional programs who do not own their own rental properties face the same issues as described above. In these instances they have established relationships with a handful of private market landlords who are willing to work specifically with participants in their programs.</p>

Wait List Information

Actual Waiting List Information

Snapshot information on the actual status of MTW waiting lists at the end of the Plan Year. The “Description” column should detail the structure of the waiting list and the population(s) served.

WAITING LIST NAME	DESCRIPTION	NUMBER OF HOUSEHOLDS ON WAITING LIST	WAITING LIST OPEN, PARTIALLY OPEN OR CLOSED	WAS THE WAITING LIST OPENED DURING THE PLAN YEAR
Federal MTW Housing Choice Voucher Program	Community-Wide	7675	Open	Yes
Federal MTW Housing Choice Voucher Program (Project-Based, 636 El Camino)	Site Based	570	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Alma Point)	Site Based	547	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Coastside Senior Housing)	Site Based	83	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)	Site Based	1753	Closed	No

Pacific)				
Federal MTW Housing Choice Voucher Program (Project-Based, Edgewater Isle)	Site Based	665	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Gateway Apartments)	Site Based	818	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Hillside Terrace)	Site Based	1,873	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Half Moon Village)	Site Based	1,013	Closed	No
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	696	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Newell)	Site Based	705	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Oceanview)	Site Based	197	Closed	No

Federal MTW Housing Choice Voucher Program (Project-Based, Pacific Oaks)	Site Based	235	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Redwood Oaks)	Site Based	1,222	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Sequoia Belle Haven)	Site Based	505	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, St. Matthew)	Site Based	1,149	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Sweeney Lane)	Site Based	1,898	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Willow Terrace)	Site Based	1,174	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, The Woodlands)	Site Based	1,145	Closed	No
Federal MTW Public Housing Units (Formerly Public Housing, now RAD PBV)	Site Based	1,820	Closed	No

Please describe any duplication of applicants across waiting lists:

Due to the fact that HACSM has site-based waiting lists for its Project Based Properties, in addition to the Housing Choice Voucher Program, household can choose to apply for multiple waiting lists thus resulting in potential duplication across the waiting lists.

Actual Changes to Waiting List in the Plan Year

Please describe any actual changes to the organizational structure or policies of the waiting list(s), including any opening or closing of a waiting list, during the Plan Year.

WAITING LIST NAME	DESCRIPTION OF ACTUAL CHANGES TO WAITING LIST
N/A	N/A
N/A	N/A

INFORMATION ON STATUTORY OBJECTIVES AND REQUIREMENTS

75% of Families Assisted Are Very Low Income

HUD will verify compliance with the statutory requirement that at least 75% of the households assisted by the MTW PHA are very low income for MTW public housing units and MTW HCVs through HUD systems. The MTW PHA should provide data for the actual families housed upon admission during the PHA's Plan Year reported in the "Local, Non-Traditional: Tenant-Based"; "Local, Non-Traditional: Property-Based"; and "Local, Non-Traditional: Homeownership" categories. Do not include households reported in the "Local, Non-Traditional Services Only" category.

INCOME LEVEL	NUMBER OF LOCAL, NON-TRADITIONAL HOUSEHOLDS ADMITTED IN THE PLAN YEAR
80%-50% Area Median Income	0
49%-30% Area Median Income	0
Below 30% Area Median Income	84
Total Local, Non-Traditional Households Admitted	84

Maintain Comparable Mix

HUD will verify compliance with the statutory requirement that MTW PHAs continue to serve a comparable mix of families by family size by first assessing a baseline mix of family sizes served by the MTW PHA prior to entry into the MTW demonstration (or the closest date with available data) and compare that to the current mix of family sizes served during the Plan Year.

BASELINE MIX OF FAMILY SIZES SERVED (upon entry to MTW)					
FAMILY SIZE	OCCUPIED PUBLIC HOUSING UNITS	UTILIZED HCVs	NON-MTW ADJUSTMENTS*	BASELINE MIX NUMBER	BASELINE MIX PERCENTAGE
1 Person	N/A	1471	0	1471	38%
2 Person	N/A	1041	0	1041	27%
3 Person	N/A	570	0	570	15%
4 Person	N/A	434	0	434	11%
5 Person	N/A	201	0	201	5%
6+ Person	N/A	148	0	148	4%
TOTAL	N/A	3865	0	3865	100%

- * “Non-MTW Adjustments” are defined as factors that are outside the control of the MTW PHA. An example of an acceptable “Non-MTW Adjustment” would include demographic changes in the community’s overall population. If the MTW PHA includes “Non-MTW Adjustments,” a thorough justification, including information substantiating the numbers given, should be included below.

Please describe the justification for any “Non-MTW Adjustments” given above:

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 (in Plan Year)				
FAMILY SIZE	BASELINE MIX PERCENTAGE**	NUMBER OF HOUSEHOLDS SERVED IN PLAN YEAR^	PERCENTAGE OF HOUSEHOLDS SERVED IN PLAN YEAR^^	PERCENTAGE CHANGE FROM BASELINE YEAR TO CURRENT PLAN YEAR
1 Person	38%	1581	42%	4%
2 Person	27%	1048	28%	0%
3 Person	15%	438	12%	-3%
4 Person	11%	352	9%	-2%
5 Person	5%	204	5%	0%
6+ Person	4%	155	4%	0%
TOTAL	100%	3778	100%	-1%

** The “Baseline Mix Percentage” figures given in the “Mix of Family Sizes Served (in Plan Year)” table should match those in the column of the same name in the “Baseline Mix of Family Sizes Served (upon entry to MTW)” table.

^ The “Total” in the “Number of Households Served in Plan Year” column should match the “Actual Total” box in the “Actual Number of Households Served in the Plan Year” table in Section II.B.i of this Annual MTW Report.

^^ The percentages in this column should be calculated by dividing the number in the prior column for each family size by the “Total” number of households served in the Plan Year. These percentages will reflect adjustment to the mix of families served that are due to the decisions of the MTW PHA. Justification of percentages in the current Plan Year that vary by more than 5% from the Baseline Year must be provided below.

Please describe the justification for any variances of more than 5% between the Plan Year and Baseline Year:

N/A

Number of Households Transitioned to Self-Sufficiency in the Plan Year

Number of households, across MTW activities, that were transitioned to the MTW PHA's local definition of self sufficiency during the Plan Year.

MTW ACTIVITY NAME/NUMBER	NUMBER OF HOUSEHOLDS TRANSITIONED TO SELF SUFFICIENCY*	MTW PHA LOCAL DEFINITION OF SELF SUFFICIENCY
MTW Self Sufficiency Program/Activity #2000-1	24	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	0	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	18	The household reached an income level such that HACSM paid \$0 subsidy for a maximum period of 90 days.
	0	(Households Duplicated Across MTW Activities)
	42	Total Households Transitioned to Self Sufficiency

* Figures should match the outcome reported where metric SS#8 is used in Section IV of this Annual MTW Report.

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

MTW Activity Number	MTW Activity Title
2000 – 1	MTW Self-Sufficiency Program
2009 – 2	Housing Readiness Program (HRP)
2000 – 3	Eliminate 40% Affordability Cap at Initial Move-In/Lease Up
2010 – 6	Triennial Recertification Schedule for Elderly/Disabled Families
2010 – 7	Simplify Rent Calculation Process
2010 – 8	Simplify Third Party Verification Process
2010 – 9	Tiered Subsidy Tables (TST)
2010 – 10	Simplify HQS Process for HACSM-owned or Affiliated Properties
2011 – 15	Institute Biennial Inspection Schedule for Units Under Contract
2011 – 16	Expand the Section 8 Project-Based Voucher Program
2011 – 17	Revise Eligibility Standards
2012 – 21	Change Qualifications for Full-Time Student Status
2012 – 22	Include Foster Care, KinGap, and Adoption Assistance Payments in Annual Income Calculation
2012 – 23	Modify Head of Household (HOH) Changes Policy
2012 – 24	Change Automatic Termination of HAP Contract from 180 to 90 Days
2012 – 26	Commitment of MTW Funds for Leveraging in the Creation of Additional Affordable Housing in San Mateo County
2011 – 27	Provider Based Program
2014 – 29	Revise Child Care Expense Deduction
2015 – 30	Standard Proration for Ineligible Household Members
2015 – 31	Local Referral Process for Supportive Service Exception Units, in Project Based Voucher (PBV) Complexes
2015 – 32	Revised EIV Income Report Review Schedule
2015 – 33	Local PBV Inspection Process
2015 – 35	<i>Revised Leasing Success Program</i>

Activity #2000-1: MTW Self-Sufficiency Program

Approved by HUD: FYE2000

Implemented by HACSM: 5/1/2000

Description of the activity

In May 2000, HACSM implemented its' first MTW activity. The MTW self-sufficiency program was originally developed in collaboration with the SMC Human Service Agency to respond to the welfare reforms of the Clinton presidency. It was thus was fashioned to focus almost exclusively on improving families' economic 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 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 revised, MTW 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 border, or 3) Full Time employment that is more than 35 miles from the nearest San Mateo County border. (See Appendix I for the full hardship policy)

Impact of the activity

In FY18, HACSM enrolled 120 new families from the MTW Wait List to the Self-Sufficiency program and 45 families graduated. There were a total of 579 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 FY2018, of the 45 households who graduated from the program, none of the families expressed that they would have to enter shelter or become homeless upon graduation. Some increased their earned income to the point where HACSM was not contributing any housing subsidy, some were able to remain in the same unit paying the full rent amount, several were able to secure an affordable below-market-rate unit from one of the cities within San Mateo County, others moved in with friends or family, and some made the decision to relocate to a jurisdiction with a lower cost of living. Below are two families who successfully graduated from the MTW program in FY18:



Yeimi Rodriguez and Family

When Yeimi and her two sons joined the Moving to Work program in August 2014, she felt lost and hopeless, facing new challenges with no direction. She felt that her career goals would never be accomplished, let alone being able to become financially stable. In under four years she received the help and support that she needed to pursue her career goals and she increased her income, her credit score, her savings, and she purchased her home in the central valley. She achieved self-sufficiency, relinquished her voucher and successfully graduated the program in December 2017.

Edgar Mayorga Bonilla

Edgar and his daughter joined the Moving to Work program in March 2016. At that time, he wanted to join the Sheet Metal Worker's Apprenticeship through his employer. In under three years he had joined the Sheet Metal Workers Union as an apprentice, and worked hard to become a Journeyman in his field. In August 2017, he achieved his career goal. Through his determination and dedication, he tripled his annual income. He achieved economic self-sufficiency in just over three years and successfully graduated from the MTW program in May 2018.



There were 21 families who requested a hardship extension in FY2018. Based on the hardship policy, HACSM approved 20 of the requests. One individual submitted her request too early, and will resubmit once she is further along in the program.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 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	\$20,001	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	\$1,333	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	208 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	186 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	128 HOH	Benchmark Achieved	N/A

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 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	107 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	112 HOH	Numeric benchmark not achieved	<p>HACSM has implemented quarterly meetings with households, to coach and mentor those in which the HOH is unemployed or earning less than \$12,000 annually, in effort to support their continued progress.</p> <p>Practically speaking, HACSM staff are working very closely with these households to secure employment and/or education to become employed.</p> <p>It's important to also note that in many of these households, although the HOH is currently unemployed, there are other adult household members that are working, thus the family does have earned income.</p>
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	42 HOH	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	FY18 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	559 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	Average subsidy \$1,548	Numeric benchmark not achieved	Due to the on-going 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.)	24 Households in the MTW Self Sufficiency program and 18 households who no longer required any housing assistance for a period of 90 days. In total: 42 households.	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 did not make any changes to the baselines or benchmarks during this fiscal year.

Changes to the data collection methodology

HACSM did not make 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. HRP households, who moved in after August 2016, are also eligible for escrow monies, upon successful graduation.

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 FY2018, eight new homeless households were admitted to the Housing Readiness Program. In total HACSM assisted 130 different households in FY18.

In FY18, 23 households graduated from the program. Of the 23 that graduated, the following four situations applied: 1) they remained in the same unit paying full rent, 2) they moved in with friends or family, 3) they chose to move out of California, or 4) they found other housing solutions. None of the households who reached the end of their term of assistance, reported that they would be returning to homelessness. Additionally, HACSM received 25 requests for hardship extensions, 23 of which were granted. Two households had exhausted all eligible extension requests and were denied.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 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	Expected average earned income in households affected by this policy after	\$16,364	\$16,293	\$18,985	\$29,220	Benchmark achieved	

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
	was \$19,339	implementation is \$20,500						
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	\$2,094	Benchmark Achieved	
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	41 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	38 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	13 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	27 HOH	Benchmark Achieved	N/A
Unemployed	In FY12, 11 HOH unemployed	Expected number of HOH unemployed: 10	16 HOH	15 HOH	22 HOH	34 HOH	Benchmark Achieved	
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	19 Households	Benchmark achieved	N/A
SS #5: Households Assisted by Services that Increase Self-Sufficiency								
Number of households	Zero families were receiving self-	HACSM expects 40 household to	53 Households	99 Households	91 Households	132 Households	Benchmark Achieved	N/A

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
receiving services aimed to increase self-sufficiency	sufficiency services prior to implementation of the activity	receive self-sufficiency services after implementation of the activity						
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	\$1,229	Benchmark achieved	In FY18, the HACSM housing market continued to represent one of the most challenging in the nation. The trend has continued over multiple years, and as such the average subsidy for the HRP 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	17 Households	13 Households	1 Household	24 Households	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 did not make any changes to the baselines or benchmarks during this fiscal year.

Changes to the data collection methodology

HACSM did not make 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 addition 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 FY2018, 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 FY18, 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 128 new HAP Contracts for households seeking units on the open market (not in PBV units) initiated in FY18, 103 households were paying up to 0-40% of their monthly adjusted income towards their rent, 20 households were paying between 41-50% of their monthly adjusted income towards their rent, and 5 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 reviewed the household's 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 FY18 HACSM received 516 Request for Tenancy Approvals (RTAs) and had to deny 18, approximately 3%, 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	FY18 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	39 Households	Benchmark Achieved	As discussed since the FY15 Report, the San Mateo County rental market continued to be extremely competitive in FY18. 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 are transit oriented and located in neighborhoods of opportunity.

Changes to the metrics, baselines or benchmarks

HACSM did not make any changes to the baselines or benchmarks during this fiscal year.

Changes to the data collection methodology

HACSM did not make 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 household’s annual adjusted 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 FY18, 562 elderly and/or disabled households were seen for recertification. Of those 562 elderly and/or disabled households, 91 have earned income in the household averaging \$22,809 per household.

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 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	\$43,048	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	Expected amount of total staff time dedicated to the task after implementation	In FY15, it required 618 hours to complete this	688 Hours	796	581	Benchmark achieved	N/A

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
	hours	of the activity 1800 hours	task					
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 – This activity has no impact on the agency’s “rental revenue”	N/A	N/A

Changes to the metrics, baselines or benchmarks

HACSM did not make any changes to the baselines or benchmarks during this fiscal year.

Changes to the data collection methodology

HACSM did not make 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.

In FY17, HACSM proposed 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 FY18 the total gross assets of all program participants was \$10,288,472 with an average account balance of \$1,520. With this balance equaling almost 99% of accounts, in actuality, program participants effectively earned zero interest. Prior to implementation of the Standard Metrics, this activity was measured as a time-saving activity. However, due to implementation of the Standard Metrics, HACSM had to change the activities original goal and instead started to require the

collection of all assets, regardless of the account value, and entered the information into its housing software system, Yardi at annual and interim recertifications. Now that all households have been interviewed for their recertifications, HACSM has greater confidence in the total value of the savings for those households whose asset values are less than \$50,000. In FY18 there were only 39 households with assets greater than \$50,000. 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	FY18 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	AAI for 2361 households seen, agency cost: \$53,810	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	In FY09, 1295 Hours	993 Hours	950 hours complete calculation of the household's AAI	762 Hours	911 Hours	756 Hours to calculate household's AAI	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 (%)	0%	0%	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	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	FY11 the rental revenue prior to implementation: \$0	Expected rental revenue after implementation: \$0	N/A – This activity has no impact on the “rental revenue”	N/A – This activity has no impact on the “rental revenue”	N/A – This activity has no impact on the “rental revenue”	N/A – This activity has no impact on the “rental revenue”	N/A	Due to the low dollar value of program participant's assets, and the rent reform program calculation, this

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
			of the agency	of the agency	of the agency	of the agency		activity has no direct impact on the "rental revenue" for HACSM.

Changes to the metrics, baselines or benchmarks

HACSM did not make any changes to the baselines or benchmarks during this fiscal year.

Changes to the data collection methodology

HACSM did not make 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, 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	FY18 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	\$1,061	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	98 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: 10%	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%	The average error rate was 1%.	Benchmark 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	In FY14, the rental revenue was \$1,638,019	In FY14, the rental revenue was \$1,638,019	The agencies rental revenue was \$1,777,306	\$1,707,628	\$1,933,802	\$1,937,368	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

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
								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 did not make any changes to the baselines or benchmarks during this fiscal year.

Changes to the data collection methodology

HACSM did not make 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 FY18 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 August 2017 HACSM increased the subsidy amounts of the TST to reflect the current, extremely competitive rental market in San Mateo County. A copy of the updated TST can be found in Appendix II.

HACSM has not received any hardship requests in relation to the TST rent reform program during FY18.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 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	\$67,867	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

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
								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	1,181 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: 10%	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.	Approximately 10% 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	In FY14, the rental revenue was \$1,638,019	Expected rental revenue after implementation: \$1,638,019	Actual rental revenue after implementation: 1,777,306	\$1,707,628	\$2,207,040	\$1,937,368	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								
Average earned income of households (\$)	In FY13 the average earned income per household was	\$256 per year (a 1% increase)	In FY15, the average earned income per household was	\$21,897 per household	\$23,068 per household	\$24,406	Benchmark not achieved	While the average earned income of the MTW households is steadily increasing each year, they have not reached the proposed benchmark.

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
	\$25, 566		\$20,773, a \$5,203 decrease					HACSM staff will continue working with households to increase their earned income, especially among the non-elderly and disabled households.
SS #3: Increase in Positive Outcomes in Employment Status (Based on Head of Household Information)								
Other: Employment	In FY14, 673 were employed	Expected number of HOH employed after implementation: 1,300	Actual number of HOH employed after implementation: 1543	2,319	2,519	2,402	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).
	In FY14, 31% of workable household were 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%	60%	Benchmark achieved	
Unemployed	In FY14 148 HOH were unemployed	Expected number of HOH unemployed after implementation: 400	Actual number of HOH unemployed after implementation: 341	95	81	87	Benchmark achieved	
	In FY14 24% of work-able HOH were unemployed	Expected percentage of total work-able households who are unemployed after implementation: 15%	Actual percentage of total work-able households who are unemployed full time after implementation: 11%	2%	1.5%	2.7%	Benchmark achieved	

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
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	300	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 there 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.	24 household due to graduation from MTW Program, and 18 due to income increases such that there was no HAP paid for a period of 90 days. In total: 42 households.	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 did not make any changes to the baselines or benchmarks during this fiscal year.

Changes to the data collection methodology

HACSM did not make 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 is not required to submit inspection reports for HACSM-owned or affiliated properties to the HUD Field Office. HACSM maintains these records in its' electronic filing system and can provide them to HUD upon request.

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	FY18 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	\$5,961	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	113 hours	Benchmark Achieved	The number of annual inspections was higher this year due to higher than normal turnover rates at one of the properties.
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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%	Average error rate in completing HQS inspections at HACSM-owned properties was 0%	Benchmark Achieved	N/A
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Changes to the metrics, baselines or benchmarks

HACSM did not make any changes to the baselines or benchmarks during this fiscal year.

Changes to the data collection methodology

HACSM did not make 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 vital in San Mateo County at this time. In the recent years HACSM inspectors have made the commitment to see new Request for Tenancy Approval requests within a 24-hour period. This commitment, in addition to the landlord financial incentives, has made a positive impact on owners of rental property and their willingness to support the affordable housing programs.

In FY18, HACSM collaborated with the SMC Behavioral Health and Recovery Services Department to hold its' annual "Housing Hero's" 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, also hosted an educational event for landlords, collaborating with Project Sentinel to further support local landlords and the management of their units.

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. All of the above activities were made possible by the time savings realized by this MTW Activity.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 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	HACSM expects that it will cost no	Actual cost to conduct HQS	\$111,471	\$138,960	\$64,841	Benchmark Achieved	As discussed in the FY16 Annual Report, when HACSM

	inspections prior to implementation: \$195,046	more than \$100,000 (annually) to complete HQS inspections	inspections: \$55,976					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	2,490 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%	Average error rate in HQS inspections was 0%	Benchmark Achieved	N/A

Changes to the metrics, baselines or benchmarks

HACSM did not make any changes to the baselines or benchmarks during this fiscal year.

Changes to the data collection methodology

HACSM did not make 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 originally received HUD approval to increase the percentage of its' voucher budget authority to 30% for the Project-Based program. And, in FYE17, due to the excessively challenging HACSM rental market, HACSM received HUD approval to further increase the percentage of its' voucher budget authority for the project based program to 35%. Expansion of the PBV program is one of the major resources for the development of additional affordable housing units and has significantly supported 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, 2018, HACSM has project based approximately 29% of its HCV portfolio.

During FY18, the following project completed construction and is now under a HAP contract.

University Senior Housing is a 41-unit affordable new construction senior development located in E. Palo Alto, CA. All 40 rental units are PBV units. The project is fully leased as of end of the reporting period.

As of June 30, 2018, the following projects were under AHAP:

- 1) Colma Veterans Housing is a 66-unit affordable new construction development serving veterans. The project is located in Colma, CA. 58 units will serve HUD-VASH eligible households while 7 units will be Section 8 Project-Based units with veteran preference.
- 2) Mosaic Garden is a 55-unit affordable rehabilitation development located in Redwood City, CA. 39 units will be project-based units with 31 Section 8 PBVs and 8 HUD-VASH PBVs.

- 3) 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.

As of June 30, 2018, the following projects received PBV commitment from HACSM:

- 1) 2821 El Camino Real is a 65-unit affordable new construction development located in Redwood City, CA. 59 units will be project-based units with 32 Section 8 PBVs and 27 HUD-VASH PBVs.
- 2) .Bradford Senior Housing is a 117-unit affordable new construction development located in Redwood City, CA. 99 units are project-based units with 89 Section 8 PBVs and 10 HUD-VASH PBVs.
- 3) Bayshore Affordable is an 80-unit affordable new construction development located in Millbrae, CA. 18 units are covered by HUD-VASH PBV subsidy.
- 4) 1283 Willow Road is a 27-unit affordable new construction development located in Menlo Park, CA. 8 units will be covered by Section 8 PBV subsidy.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 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: \$0	Expected cost of task after implementation : \$0	Actual cost of task after implementation of the activity (\$)	N/A	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 0 Hours	Expected amount of total staff time to complete the task after implementation 0 Hours	Actual amount of total staff time dedicated to the task after implementation of the activity 0 Hours	N/A	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	There were zero (0)	Zero (0) households	In FY15, zero	In FY16,	In FY17,	In FY18,	Benchmark	N/A

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
households at or below 80% AMI that would lose assistance or need to move (decrease). If the units reach a specific type of household, HACSM will give that type here.	households losing assistance/moving prior to implementation of the activity	are expected to lose assistance or be required to move after implementation	(0) households have lost their housing assistance or been required to move due to this activity	zero (0) households have lost their housing assistance or been required to move due to this activity	zero (0) households have lost their housing assistance or been required to move due to this activity	zero (0) households have lost their housing assistance or been required to move due to this activity	achieved	

Changes to the metrics, baselines or benchmarks

HACSM did not make any changes to the baselines or benchmarks during this fiscal year.

Changes to the data collection methodology

HACSM did not make 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 neediest households in our community. In FY18, approximately 7,675 households had submitted a pre-application and HACSM randomly selected 900 households for the waitlist. HACSM subsequently interviewed 431 households for initial eligibility determinations, the remainder either had already located other housing options or did not respond to the interview letter.

In FY18, two households were denied eligibility due to exceeding the asset limits and no 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	FY18 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	Approximately 2.3 months	Benchmark Achieved	N/A

Changes to the metrics, baselines or benchmarks

HACSM did not make any changes to the baselines or benchmarks during this fiscal year.

Changes to the data collection methodology

HACSM did not make 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	FY18 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	\$1,061	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	25 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%	Average error rate: 0%	Benchmark achieved	As reported in FY14, HACSM is unable to provide a baseline for this metric, as this data 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 did not make any changes to the baselines or benchmarks during this fiscal year.

Changes to the data collection methodology

HACSM did not make 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 FY18, 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	FY18 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	In FY18 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	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 did not make any changes to the baselines or benchmarks during this fiscal year.

Changes to the data collection methodology

HACSM did not make 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 with their college courses immediately thereafter. In FY18, there were five households with full time students over the age of 24, with an average earned income of approximately \$22,232. 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	FY18 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	\$33,347	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 did not make any changes to the baselines or benchmarks during this fiscal year.

Changes to the data collection methodology

HACSM did not make 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 FY18, 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	FY18 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	\$0	Benchmark Achieved	N/A

Changes to the metrics, baselines or benchmarks

HACSM did not make any changes to the baselines or benchmarks during this fiscal year.

Changes to the data collection methodology

HACSM did not make 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 (Activity #2000-1). 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 5-year term.

Impact of the activity

In FY18, 47 households in the MTW program requested a change in the HOH.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 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	Approximately 2.3 months	Benchmark Achieved	N/A

Changes to the metrics, baselines or benchmarks

HACSM did not make any changes to the baselines or benchmarks during this fiscal year.

Changes to the data collection methodology

HACSM did not make 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 FY18, 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 FY18, 38 households reached “zero HAP” status, 18 households exited the program, and 12 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	FY18 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	Approximately 2.3 months	Benchmark Achieved	N/A

Changes to the metrics, baselines or benchmarks

HACSM did not make any changes to the baselines or benchmarks during this fiscal year.

Changes to the data collection methodology

HACSM did not make 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. As of June 30, 2018, \$8,250,000 of the MTW funds have been awarded to six developments, enabling creation of 387 affordable housing units and leveraging \$8,903,312 local funds.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 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	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	40 units	Benchmark Achieved	N/A

information here.								
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	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 of MTW funds invested	In FY15, HACSM invested \$3.2 million MTW Funds. This \$3.2 million was leveraged by a total development cost of \$56.2 million	In FY16HACSM invested \$10 million MTW funds. The \$10 million MTW Funds were leveraged by a total development cost of \$201.2 million.	In FY17, the total investment of \$1 million MTW Funds was leveraged an additional \$300,000 from San Mateo County Measure A funds.	The investment of \$1 million MTW Funds leveraged an additional \$585,000 from SMC RDA Funds.	Benchmark Achieved	N/A

Changes to the metrics, baselines or benchmarks

HACSM did not make any changes to the baselines or benchmarks during this fiscal year.

Changes to the data collection methodology

HACSM did not make 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 late 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, was 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 began implementation in early FY18. The other three PBA programs have continued to 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. We have highlighted three different households in the PBA program in the “Serve More Families” section of the Introduction to this Annual Report. See page 15 to read their stories. The PBA program has continued to successfully reach households that would otherwise be very challenging to reach, let alone succeed in the MTW program.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 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)	In 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	84 households	Benchmark Achieved	N/A
SS #1: Increase in Household Income								
Average earned	Average earned	HACSM expects the	In FY15, the	\$1,172	\$897.97	\$1,030	Benchmark	N/A

income of households (\$)	income of households affected by this policy prior to implementation was \$0	average earned income of households affected by this policy to be \$900	actual average earned income of households affected by this policy was \$1,032				Achieved	
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	31	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%	62%	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	51	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%	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	5 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.	** 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 did not make any changes to the baselines or benchmarks during this fiscal year.

Changes to the data collection methodology

HACSM did not make 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. Originally this activity applied to HACSM's Public Housing and Section 8 Housing Choice Voucher programs, however, due to the fact that HACSM has converted all of its' Public Housing stock to PBV and RAD-PBV, HACSM is now only referring to the Section 8 MTW program.

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

HACSM has continued to find that this activity helps 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 FY18, this activity resulted in approximately \$15,514 child care expenses that were disregarded due to exceeding the policy limits. There were 139 households that claimed child care expenses for deduction, two households for school attendance, 132 households to work, and five households to seek work. The average amount per household that was deducted from the household's annual adjusted income

was \$5,473.

There were no hardship requests received as a result of this activity in FY18.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 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	\$1,937,368	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 did not make any changes to the baselines or benchmarks during this fiscal year.

Changes to the data collection methodology

HACSM did not make 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: 09/02/2014

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 FY18, there were 135 mixed families in the program. As a result of this MTW Activity, mixed families experienced some relief in the housing search and lease up process. Since implementation, HACSM has not received any hardship requests from participants in relation to this MTW activity.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 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	\$9,230	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	135	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 0%	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%	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	\$1,937,368	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 did not make any changes to the baselines or benchmarks during this fiscal year.

Changes to the data collection methodology

HACSM did not make 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 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 a list of 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 FY18, HACSM has used this MTW flexibility mainly for PBV units with specific preferences, such as homeless and special needs units where the program participants may benefit from the services provided by the owner.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 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	N/A

Changes to the metrics, baselines or benchmarks

HACSM did not make any changes to the baselines or benchmarks during this fiscal year.

Changes to the data collection methodology

HACSM did not make 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. 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 potentially undisclosed income during the reexamination processes. With the removal of this requirement as part of the interim recertification process, HACSM has also continued to work with and educate staff regarding thoroughly communicating with participants during the regular recertification process to ensure their on-going compliance, up to and including potential termination procedures.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 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 to complete this task was: \$12,749	HACSM expects that the cost to complete this task will be: \$2,560	\$1,380	0	\$2,405	\$1,956	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	34 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	\$1,937,368	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 did not make any changes to the baselines or benchmarks during this fiscal year.

Changes to the data collection methodology

HACSM did not make 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 considers 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 FY18. 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	FY18 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	N/A	N/A	N/A	N/A	N/A	N/A

		be no more than \$6,218						
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	N/A	N/A

Changes to the metrics, baselines or benchmarks

HACSM did not make any changes to the baselines or benchmarks during this fiscal year.

Changes to the data collection methodology

HACSM did not make 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' Broader Use of Funds Authority to implement additional programs and activities to increase participation in the MTW program and the utilization of this highly valued housing assistance.

The Leasing Success Program consists of 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. To date, HACSM has utilized its' MTW Authority in all of these areas, except the security deposit loan program, as there are other Agencies within the SMC system who are able to provide this assistance.

Impact of the activity

In FY18, HACSM renegotiated its contract 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 22 MTW families through the course of the year. In FY18 HACSM has spent approximately \$132,000 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. In FY18, 45 new landlords have joined the program, 92 landlords have received the "No Loss Bonus", 11 Landlords have received a continuity bonus and 9 households have received security deposit assistance.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 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	In FY 14, Zero (0) new housing units	HACSM expects 10 new housing units each fiscal year	N/A	13	86	45	Benchmark achieved	N/A
HC #3: Decrease in Wait List Time								
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	Approximately 2.3 months	Benchmark achieved	N/A
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	Zero (0) households	10 households	N/A	58	47	39	Benchmark achieved	N/A
HC #7: Households Assisted by Services that Increase Housing Choice								
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	53 Households 22 - Abode Assistance 31 – HACSM Renting Success Workshops	Benchmark achieved	N/A

Changes to the metrics, baselines or benchmarks

HACSM did not make any changes to the baselines or benchmarks during this fiscal year.

Changes to the data collection methodology

HACSM did not make 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

MTW Activity Number	MTW Activity Title	FY Activity Closed
2000 – 4	Escrow Accounts	2014
2009 – 5	Expand Usage of PBV at HACSM Developments Undergoing Disposition	2018
2010 – 11	Eliminate Competitive Process for Allocation of PBV to Former Public Housing	2018
2010 – 12	Waive 12 Month Stay Requirement for Residents in Formerly Public Housing Units Converted to PBV	2018
2010 – 13	Accept Lower HAP by Modifying PBV Rules for In-place Residents at former Public Housing Developments	2018
2010 – 14	Establish Flat or Market Rate Policy for Over-income Public Housing Residents at Conversion of Public Housing Units to Project-Based Units	2018
2011 – 18	Eliminate 100% Excluded Income from the Income Calculation Process	2015
2011 – 19	Eliminate the Requirement to Complete New HAP Contract with Utility Responsibility Changes	2017
2011 – 20	Apply Current Payment Standards at Interim Re-examination	2013
2012 – 25	Exclude Asset Income from Calculation for Households with Assets Under \$50,000	2017
2013 – 28	Apply MTW Flexibilities to Public Housing	2018
2015 – 34	Local Collections Process	2017

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 (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.

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

Approved by HUD: FYE2010

Implemented by HACSM: 7/1/2009

Closed by HACSM: 6/30/2018

Rationale for Closing out the Activity

As of November 2018, HACSM converted all 30 units at El Camino Village, formerly a public housing property, to RAD PBV. With this conversion, HACSM no longer has any Public Housing in its portfolio, thus is closing this activity as of June 30, 2018.

Formerly, the dispo 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.'

HACSM does not own or operate any additional properties.

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

Approved by HUD: FYE2010

Implemented by HACSM: 1/27/2011

Closed by HACSM: 6/30/2018

Rationale for Closing out the Activity

Since FY14, when 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, HACSM has now in FY18 completed the conversion of all formerly public housing properties to PBV. At this time, HACSM does not own or operate any additional properties and thus is closing 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

Closed by HACSM: 6/30/2018

Rationale for Closing out the Activity

As of November 2018, HACSM converted all 30 units at El Camino Village, formerly a public housing property, to RAD PBV. With this conversion, HACSM no longer has any Public Housing in its portfolio, thus is closing this activity as of June 30, 2018.

Formerly, the dispo 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.'

HACSM does not own or operate any additional properties.

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

Closed by HACSM: 6/30/2018

Rationale for Closing out the Activity

As of November 2018, HACSM converted all 30 units at El Camino Village, formerly a public housing property, to RAD PBV. With this conversion, HACSM no longer has any Public Housing in its portfolio, thus is closing this activity as of June 30, 2018.

Formerly, the dispo 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.'

HACSM does not own or operate any additional properties.

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
Closed by HACSM: 6/30/2018

Rationale for Closing out the Activity

As of November 2018, HACSM converted all 30 units at El Camino Village, formerly a public housing property, to RAD PBV. With this conversion, HACSM no longer has any Public Housing in its portfolio, thus is closing this activity as of June 30, 2018.

Formerly, the dispo 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.'

HACSM does not own or operate any additional properties.

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

Approved by HUD: FYE2013

Implemented by HACSM: 7/1/2012
Closed by HACSM: 6/30/2018

Rationale for Closing out the Activity

As of November 2018, HACSM converted all 30 units at El Camino Village, formerly a public housing property, to RAD PBV. With this conversion, HACSM no longer has any Public Housing in its portfolio, thus is closing this activity as of June 30, 2018.

HACSM will continue to apply the MTW activities listed below as part of its MTW program and will reporting on all MTW units (including Midway Village and El Camino Village) in its' subsequent MTW Reports. Below are the standard metrics through this FYE, for the activity.

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 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 activity: \$1,354	\$1,400	\$1,207	\$2,051	Benchmark Achieved	The per household cost in FY18 was \$68.37. Since ECV was converted to RAD PBV all households were seen, thus the higher cost in FY18.
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	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	FY14 the average error rate in completing the task was 10%	Average error rate in completing the task: 10%	N/A	0%	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 \$26,000	Actual average earned income: \$31,179	\$38,640	\$38,175	\$38,341	Benchmark achieved	N/A
SS #2: Increase in Household Savings								
Average savings of households (\$)	FY14 the average savings per was 172	Expected savings per household is \$500	Actual average savings per household: \$1,811	\$1,624	\$2,391	\$913	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	12	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%	73%	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	18	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%	27%	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	2	Benchmark achieved	N/A
SS #5: Households Assisted by Services that Increase Self-Sufficiency								
Number of households receiving services aimed to increase self sufficiency	0 households receiving self- sufficiency services prior to implementation	Expected number of households receiving services after implementation: 0	Actual number of households receiving self- sufficiency services: 0	0	0	0	Benchmark achieved	N/A
SS #6: Reducing Per Unit Subsidy Costs for Participating Households								
Average amount	Average subsidy per	Expected average	Actual average	\$44.54	\$31.21	\$35.13	Benchmark	Based on a total of

of Section 8 /Section 9 subsidy per household affected by this policy	household affected by this policy prior to implementation: \$1,123	subsidy per household affected by this policy after implementation: \$1,123	subsidy per household: \$1,123				achieved	\$5,270 in operating subsidy from HUD, for the 30 units at El Camino Village, for 5 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	\$121,570	Benchmark achieved	Based on an average resident rent portion for 5 months.
SS #8: Households Transitioned to Self-Sufficiency								
Number of households transitioned to self-sufficiency	0 households transitioned to self-sufficiency prior to implementation	0 households are expected to be 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	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

SECTION V

Sources and Uses of Funds

A. ACTUAL SOURCES AND USES OF MTW FUNDS

i. Actual Sources of MTW Funds in the Plan Year

HACSM submitted unaudited and will be submitting the audited information in the prescribed Financial Data Schedule (FDS) format through the Financial Assessment System – PHA (FASPHA).

ii. Actual Uses of MTW Funds in the Plan Year

HACSM submitted unaudited and will be submitting the audited information in the prescribed FDS format through the FASPHA.

iii. Describe Actual Use of MTW Single Fund Flexibility

HACSM provided a thorough narrative of actual activities that use only the MTW single fund flexibility.

ACTUAL USE OF MTW SINGLE FUND FLEXIBILITY
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.

B. LOCAL ASSET MANGEMENT PLAN

i. Did the MTW PHA allocate costs within statute in the Plan Year?

Yes

ii. Did the MTW PHA implement a local asset management plan (LAMP) in the Plan Year?

No

iii. Did the MTW PHA provide a LAMP in the appendix?

No

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

N/A

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 been 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

9/27/2018
Date

Housing Authority of the County of San Mateo

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.

Appendix II

Tiered Subsidy Table (TST), effective 8/1/2017

New-Move TST Effective 8/1/17										
Voucher Tenant-Based Programs Only										
Tenant Based Properties (All Except MR, PSH)										
L	H	0	1	2	3	4	5	S		
0	1,999	1603	2025	2541	3313	3961	4289	1220		
2,000	4,999	1540	1962	2478	3250	3898	4226	1155		
5,000	7,999	1465	1887	2403	3175	3823	4151	1098		
8,000	10,999	1390	1812	2328	3100	3748	4076	1042		
11,000	13,999	1315	1737	2253	3025	3673	4001	986		
14,000	16,999	1240	1662	2178	2950	3598	3926	930		
17,000	19,999	1165	1587	2103	2875	3523	3851	873		
20,000	22,999	1090	1512	2028	2800	3448	3776	817		
23,000	25,999	1015	1437	1953	2725	3373	3701	761		
26,000	28,999	940	1362	1878	2650	3298	3626	705		
29,000	31,999	865	1287	1803	2575	3223	3551	648		
32,000	34,999	790	1212	1728	2500	3148	3476	592		
35,000	37,999	715	1137	1653	2425	3073	3401	536		
38,000	40,999	640	1062	1578	2350	2998	3326	480		
41,000	43,999	565	987	1503	2275	2923	3251	423		
44,000	46,999	490	912	1428	2200	2848	3176	367		
47,000	49,999	415	837	1353	2125	2773	3101	311		
50,000	52,999	340	762	1278	2050	2698	3026	255		
53,000	55,999	265	687	1203	1975	2623	2951	198		
56,000	58,999	190	612	1128	1900	2548	2876	142		
59,000	61,999	115	537	1053	1825	2473	2801	86		
62,000	64,999	40	462	978	1750	2398	2726	30		
65,000	67,999	0	387	903	1675	2323	2651	0		
68,000	70,999	0	312	828	1600	2248	2576	0		
71,000	73,999	0	237	753	1525	2173	2501	0		
74,000	76,999	0	162	678	1450	2098	2426	0		
77,000	79,999	0	87	603	1375	2023	2351	0		
80,000	82,999	0	12	528	1300	1948	2276	0		
83,000	85,999	0	0	453	1225	1873	2201	0		
86,000	88,999	0	0	378	1150	1798	2126	0		
89,000	91,999	0	0	303	1075	1723	2051	0		
92,000	94,999	0	0	228	1000	1648	1976	0		
95,000	97,999	0	0	153	925	1573	1901	0		
98,000	100,999	0	0	78	850	1498	1826	0		
101,000	103,999	0	0	3	775	1423	1751	0		
104,000	106,999	0	0	0	700	1348	1676	0		
107,000	109,999	0	0	0	625	1273	1601	0		
110,000	112,999	0	0	0	550	1198	1526	0		
113,000	115,999	0	0	0	475	1123	1451	0		
116,000	118,999	0	0	0	400	1048	1376	0		
119,000	121,999	0	0	0	325	973	1301	0		
122,000	124,999	0	0	0	250	898	1226	0		
125,000	127,999	0	0	0	175	823	1151	0		
128,000	130,999	0	0	0	100	748	1076	0		
131,000	133,999	0	0	0	25	673	1001	0		
134,000	136,999	0	0	0	0	598	926	0		
137,000	139,999	0	0	0	0	523	851	0		
140,000	142,999	0	0	0	0	448	776	0		
143,000	145,999	0	0	0	0	373	701	0		
146,000	148,999	0	0	0	0	298	626	0		
149,000	151,999	0	0	0	0	223	551	0		
152,000	154,999	0	0	0	0	148	476	0		
155,000	157,999	0	0	0	0	73	401	0		
158,000	160,999	0	0	0	0	0	326	0		
161,000	163,999	0	0	0	0	0	251	0		
164,000	166,999	0	0	0	0	0	176	0		
167,000	169,999	0	0	0	0	0	101	0		
170,000	172,999	0	0	0	0	0	26	0		