

HOUSING AUTHORITY OF THE COUNTY OF SAN MATEO

MOVING TO WORK ANNUAL REPORT FY2019



**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.

Having joined the MTW program in 1999, HACSM has now completed its 20th 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 actively participates with the San Mateo County Continuum of Care and the Center on Homelessness to support permanently disabled individuals in the community who have experienced long term, chronic homelessness. 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, FY2019 has continued to be a challenging year for affordable housing in San Mateo County, but we have also made great strides to combat the persistent housing challenges. 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 San Francisco Bay Area is sought after in terms of financial opportunity, the cloud of on-going and persistent homelessness is a real and present threat. In the midst of this pervasive housing challenge, 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 and to find new, creative pathways to efficiently work together as a community to both end homelessness and significantly reduce the terrors of potential homelessness for low-income families.

Following are examples from FY2019 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

During FY19 the San Mateo County Board of Supervisors, the governing board for the Housing Authority, 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 (MTW Activity #: 2012-16: Commitment of MTW Funds for Leveraging in the Creation of Additional Affordable Housing in San Mateo County, or 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.

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 either under construction or completed in FY19.

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.

The Housing Authority 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 had the first option to return once construction is completed.



Colma Veterans Housing (Mercy Housing)

Located in Colma, CA, Mercy Housing, is now completing the leasing of this new property designed to provide housing for 59 previously homeless veterans and veteran families.

The Housing Authority leveraged \$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 to assist in the development of the property.

In addition to affordable housing, the property also provides critical space for the two local Veterans Administration Medical Centers 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. The property is also located near the Daly City BART, mass transit system.

Construction was completed in the Spring of 2019 and the Housing Authority has collaborated with both Veterans Administrations to ensure that veteran households have completed the VASH eligibility and property requirements and are currently moving into the property. HACSM, the Veteran Administration's and the SMC Center on Homelessness are also collaborating also assist other, non-VASH homeless veterans and their families in San Mateo County to also receive affordable assistance.



Sweeney Lane Apartments (MidPen Housing Corporation)

Located less than a mile from BART and within walking distance to several major bus lines, Sweeney Lane supports the vision of the Grand Boulevard Initiative (GBI) in San Mateo County, which encourages higher-density, transit-oriented development and aims to transform El Camino Real into a safe, attractive and welcoming place to live, work and play.

The development provides 52 two- and three-bedroom apartments for families earning up to 60% of the Area Median Income on the site of a former car dealership. Project-based vouchers help the owner, MidPen Housing, target families earning Extremely Low Incomes.



Promoting Self-Sufficiency

In FY2019, 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-four 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.

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 continued to refine its' internal processes to further support participant families throughout their program participation, including streamlining the rent calculation process, greater use of technology and internal reorganization, to be available to respond to and address emerging issues with and for the participants.

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 FY19, HACSM continued the expansion of its five-year, MTW Self-Sufficiency program. In FY19, 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. A copy of the Hardship Policy can be found in Appendix I.

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. See Activity 2011-16 to learn more about how HACSM is using the MTW program to assist and support this long-term vision.

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 2018, HACSM hosted its 6th Annual Housing & Resource Expo for all participants in the MTW Self-Sufficiency program, VASH, Foster Youth, formerly homeless individuals and families who participate in the Housing Readiness program. 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.

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	Leased	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: 1) 58 HUD-VASH PBVs and 2) Seven (7) Section 8 PBVs. The project is currently undergoing the lease-up process.
Miller Avenue Senior Housing	8	8	Leased	No	Miller Avenue Senior Housing is an 81-unit new construction senior housing project located in South San Francisco, CA. Eight (8) units are assisted with PBV subsidy serving dually eligible (Medicaid and The Health Plan of San Mateo) seniors who are (1) currently residing 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 are provided by Health Plan of San Mateo and its network of service providers. The project is currently fully leased.
Mosaic Garden	44	39	Leased	No	Mosaic Garden is a 55-unit rehabilitation development in Redwood City, CA. HACSM has committed eight (8) HUD-VASH Vouchers, awarded through HACSM's HUD's FY2016 HUD-VASH PBV set-aside award and 36 Section 8 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 was completed in two phases. Phase 1 of the project is completed and is fully leased. Phase 2 of the project is undergoing lease-up process.
El Camino Village	N/A	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.

2821 El Camino	59	59	Committed	No	2821 El Camino is a 67-unit new construction development in Redwood City, CA. HACSM has committed 27 HUD-VASH PBVs, awarded through HACSM's FY2016 HUD-VASH PBV set-aside award and 32 Section 8 PBVs to the project. Construction of the property had started in early 2019.
Bay Meadows	46	46	Committed	No	Bay Meadows is a 68-unit new construction development in San Mateo, CA. HACSM has committed 12 HUD-VASH PBVs, awarded through HACSM's FY2016 HUD-VASH PBV set-aside award and 34 Section 8 PBVs to the project. Construction of the property started in early 2019.
Bayshore Affordable	18	18	Committed	No	Bayshore affordable is an 80-unit new construction development in Millbrae, CA. HACSM has committed 18 HUD-VASH vouchers to the project. The project owner is in the process of securing funding in hope of beginning construction in the first half of 2020.
Arroyo Green (formerly known as Bradford Senior Housing)	89	89	Committed	No	Arroyo Green is a 117-unit new construction senior housing development in Redwood City, CA. HACSM has committed 10 HUD-VASH PBVs, awarded through HACSM's FY2016 HUD-VASH PBV set-aside award and 89 Section 8 PBVs to the project. Construction of the property started in early 2019.
1283 Willow Road	8	8	Committed	No	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 developer is currently working with the city on the entitlement process.
353 Main Street	81	81	Committed	No	353 Main Street is a 125-unit new construction development in Redwood City, CA. HACSM has committed 19 HUD-VASH vouchers and 62 Section 8 PBVs to the project. The project owner is in the process of securing financing in hope of starting construction in the first half of 2020.
Light Tree Apartments	89	89	Committed	No	Light Tree Apartments is a 185-unit rehabilitation and new construction development in E. Palo Alto, CA. HACSM has committed 89 Section 8 PBVs to the project. All 89 PBV units are in the "new construction" section of the development. The project owner is in the process of security financing in hope of starting construction in 2021
Firehouse Square	33	33	Committed	No	Firehouse Square is a 66-unit new construction development in Belmont, CA. HACSM has committed 33 Section 8 PBVs to the project. The project is scheduled to go before the City of Belmont for entitlements in October and is on schedule to apply for 9% LIHTC in

					March 2020 which would allow them to begin construction in fall of 2020.
Belmont Affordable Housing	18	18	Committed	No	Belmont Affordable Housing is a 37-unit new construction development in Belmont, CA. HACSM has committed 18 Section 8 PBVs to the project. The project is working with the City of Belmont on entitlements and expects to be entitled in early 2020 with plans to apply for 9% LIHTC in mid-2020. Construction will start around the end of 2020.
558		558	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:

Mosaic Garden:

The number of Project-Based Vouchers has been reduced from 44 to 39 per owner's request.

Additional Project-Based commitments:

In the FY19 Annual Plan, HACSM stated that it will continue to utilize project-based vouchers as one of the tools to address shortage in affordable housing in San Mateo County. In December 2018, HACSM issued an RFP for 250 Housing Choice and HUD-VASH project-based units. Out of seven proposals HACSM received, four projects were selected, awarding 221 vouchers in total.

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
<p>The HACSM Capital Fund grant is generated by a very small Public Housing Inventory. For FY19 HACSM received \$10 in Operating Subsidy and \$0 in Capital Funds for El Camino Village (Development #CA014000004). Additionally, HACSM received \$379,456 for RHF Capital Funds (Midway Village) which was disbursed to El Camino Village under MTW fungibility. These funds were used for the ongoing maintenance of the property.</p>

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	0	0	0	0
MTW Housing Choice Vouchers (HCV) Utilized	51,708	49,884	4,309	4,157
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:

N/A

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>All residents of San Mateo County continued 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 wage technology and biotech workers within the same limited housing market. To address this situation, HACSM has increased its project-based voucher allocation to secure additional long-term affordable units, and has collaborated with affordable housing developers, and private market landlords.</p> <p>Through its' MTW authority, HACSM created a MTW activity, titled the Leasing Success Program, to provide financial incentives to owners of rental property who choose to participate in the program.</p> <p>In the Spring of 2019, HACSM completed a rent study and determined that the subsidy amounts should be increased for all bedroom sizes to address participant rent burdens and the challenging rental market and proposed the implementation for July 2019. HACSM has also continued to offer the Renting Success Workshop, free to all voucher holders to share new methods and approaches for a successful 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	6377	Open	Yes
Federal MTW Housing Choice Voucher Program (Project-Based, 636 El Camino)	Site Based	573	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Alma Point)	Site Based	546	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Coastside Senior Housing)	Site Based	53	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Delaware Place)	Site Based	1791	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Delaware Pacific)	Site Based	1732	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Edgewater Isle)	Site Based	657	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Gateway Apartments)	Site Based	703	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Hillside Terrace)	Site Based	1,899	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Half Moon Village)	Site Based	754	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Magnolia Plaza)	Site Based	606	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Mosaic Garden)	Site Based	820	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Midway Village)	Site Based	336	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Newell)	Site Based	646	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Oceanview)	Site Based	198	Closed	No

Federal MTW Housing Choice Voucher Program (Project-Based, Pacific Oaks)	Site Based	242	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Redwood Oaks)	Site Based	1,233	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Rotary Terrace)	Site Based	61	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Sequoia Belle Haven)	Site Based	446	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, St. Matthew)	Site Based	1,120	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Sweeney Lane)	Site Based	4,050	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Serenity Senior Housing)	Site Based	454	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Willow Terrace)	Site Based	1,186	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	1,680	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	69
	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%	1696	42%	4%
2 Person	27%	1074	28%	0%
3 Person	15%	473	12%	-3%
4 Person	11%	363	9%	-2%
5 Person	5%	206	5%	0%
6+ Person	4%	144	4%	0%
TOTAL	100%	3956	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	43	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	9	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	20	The household reached an income level such that HACSM paid \$0 subsidy for a maximum period of 90 days.
	72	(Households Duplicated Across MTW Activities)

Total Households Transitioned to Self Sufficiency

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</i> Leasing Success Program

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 MTW-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 FY19, HACSM enrolled 180 new families from the MTW Wait List to the Self-Sufficiency program and 40 families graduated. During this time 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 FY2019, of the 40 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 FY19:



When Yeni, a single mother of a 5-year-old, joined the MTW program in April 2014 she was receiving welfare benefits and due to her inadequate housing, was unable to keep a job and unable to work towards her educational goals. Once she was able to find stable housing using her MTW voucher, she joined and maintained a work study position at Skyline College to help pay her expenses while she was attending school full-time, and eventually transferred to San Jose State University. Because of her hard work and determination, she was able to complete an AA degree in Interdisciplinary Studies, an AS degree in Business Administration, and a BA degree in Humanities-Liberal Arts. Participating in the work study program, Yeni was able to gain valuable work experience and upon graduation secured a job with the Contra Costa Community College District with a starting salary of \$44,160 and health benefits. The MTW Self-Sufficiency Program also helped encourage Yeni to work on her credit and she was able to increase her credit score by 224 points while on the MTW program.

Yeni made the decision to relinquish her voucher before the end of the term limit, in October of 2018, and move to Contra Costa County where she was able to find an affordable apartment that is located close to her new job for her and her daughter.

"I never imagine I could come this far. I never imagine I could achieve the impossible, but the MTW program made it possible" – Yeni Galvez

Growing up, Zena struggled in school and studying did not come easy. When she joined the Moving to Work program, she was determined to be successful. At the beginning she wasn't working and had always wanted to go to college. Participating in the program allowed her to go back to school, further her education, and increase her passion for teaching. While on the program, Zena was hired for a part-time position, continued her studies in early childhood education at San Francisco State University *and* obtained her Master of Arts Degree in Special Education. She completed her Specialist Instruction Credentials in Special Education, received her Bachelor of Art Degree in Child and Adolescent Development, and graduated Summa Cum Laude. Her part-time work gave her the teaching experience she needed and since then has been employed full time as an Early Childhood Special Educator in the Bay Area. Zena's participation in the MTW program allowed her to complete her educational goals, learn how to maintain a monthly budget, improve her credit score, increase her income, and save for her retirement. With all her successes, she is also now able to help save for her grandson's education, too!



There were 23 families who requested a hardship program extension in FY2019. Based on the hardship policy, HACSM approved all 23 of the requests.

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 Outcome	FY19 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 <i>increase</i> in average earned income of \$500 annually of households affected by this policy prior to implementation.	\$20,094	\$25,341	\$21,610	\$20,001	\$31,343	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	1,738	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	242 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	169 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	103 HOH	Benchmark Achieved	N/A

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 Outcome	FY19 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	308 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	46 HOH	Benchmark Achieved	N/A
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 Households	41 Households	Benchmark Achieved	N/A
SS #5: Households Assisted by Services that Increase Self-Sufficiency									
Number of households receiving services aimed to increase self-sufficiency	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	502 Households	Benchmark Achieved	N/A
SS #6: Reducing Per Unit Subsidy Costs for Participating Households									

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 Outcome	FY19 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
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	Average subsidy \$1,681	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.	40 Households graduated from the MTW Self-Sufficiency program.	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 FY2019, 12 new homeless households were admitted to the Housing Readiness Program. In total HACSM assisted 135 different households in FY19.

In FY19, nine households graduated from the program. Of the nine 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 15 requests for hardship extensions, all of which were granted.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 Outcome	FY19 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
SS #1: Increase in Household Income									
Average earned income of households (\$)	Average earned income of households affected by this policy in FYE13 was \$19,339	Expected average earned income in households affected by this policy after implementation is \$20,500	\$16,364	\$16,293	\$18,985	\$29,220	\$27,506	Benchmark achieved	
SS #2: Increase in Household Savings									

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 Outcome	FY19 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
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	45 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	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	12 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	75 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	18 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	18 Households	Benchmark achieved	N/A
SS #5: Households Assisted by Services that Increase Self-Sufficiency									
Number of households receiving services aimed	Zero families were receiving self-sufficiency services prior to	HACSM expects 40 household to receive self-sufficiency	53 Households	99 Households	91 Households	132 Households	82 Households	Benchmark Achieved	N/A

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 Outcome	FY19 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
to increase self-sufficiency	implementation of the activity	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	\$1,794	Benchmark achieved	In FY19, 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	9 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 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 FY2019, 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.

Throughout this fiscal year, 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 115 new HAP Contracts for households seeking units on the open market (not in PBV units) initiated in FY19, 104 households were paying up to 0-40% of their monthly adjusted income towards their rent, 8 households were paying between 41-50% of their monthly adjusted income towards their rent, and 3 households were paying 50% or more of their monthly adjusted income towards their rent, however none were elderly or disabled households. 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 FY19 HACSM received 311 Request for Tenancy Approvals (RTAs) and had to deny 13, approximately 4%, 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	FY19 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	68 Households	Benchmark Achieved	As discussed since the FY15 Report, the San Francisco Bay Area rental market, which includes San Mateo County, continued to be extremely competitive in FY19. 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 FY19, 1,991 elderly and/or disabled households were seen for recertification. Of those 1,991 elderly and/or disabled households, 124 have earned income in the household averaging \$28,107 per household.

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 Outcome	FY19 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 hours	Expected amount of total staff time dedicated to the task after implementation of the activity 1800 hours	In FY15, it required 618 hours to complete this task	688 Hours	796	581		Benchmark achieved	N/A

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 Outcome	FY19 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE #5: Increase in Agency Rental Revenue									
Rental revenue in dollars	Rental revenue prior to implementation	Expected rental revenue after implementation	N/A – This activity has no impact on the “rental revenue” of the agency	N/A – This activity continues to have no impact on the agency’s “rental revenue”	N/A – This activity has no impact on the agency’s “rental revenue”	N/A – 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 FY19 the total gross assets of all program participants with assets less than \$50,000 was \$6,597,568 with an average account balance of \$1,737. 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 activity's 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.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 Outcome	FY19 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	AAI for 2799 Households seen; agency cost: \$71,746	N/A	N/A
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	896 Hours to calculate the household's AAI	Benchmark Achieved	N/A
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	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” of the agency	N/A – This activity has no impact on the “rental revenue” of the agency	N/A – This activity has no impact on the “rental revenue” of the agency	N/A – This activity has no impact on the “rental revenue” of the agency	N/A – This activity has no impact on the “rental revenue” of the agency	N/A	Due to the low dollar value of program participant’s assets, and the rent reform program calculation, this activity has no direct impact on the “rental revenue” for HACSM.

Changes to the metrics, baselines or benchmarks

HACSM 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 efficiencies 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	FY19 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	\$1,716	Benchmark Achieved	N/A
CE #2: Staff Time Savings									
Total time to complete the task in staff hours	On average, HACSM staff spent 738 hours annually to process third-party verifications (est. FYE2009)	HACSM expects an average of no more than 369 hours per year for staff to process third-party verifications	In FY15, HACSM spent an average of 119 hours to process third-party verifications	99 Hours	119 Hours	98 Hours	117 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%.	The average error rate was less than 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	\$2,130,007	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

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 Outcome	FY19 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
									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 FY19 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 the spring of 2019, HACSM conducted a review of the rent burden for the participant households and the new Fair Market Rents published by HUD and subsequently increased the subsidy amounts of the TST, to be effective July 2019 to reflect the current, extremely competitive rental market in San Mateo County. A copy of the updated TST can be found in Appendix II.

In FY19, with the on-going monitoring of the tenant rent portions and the Agency budget, HACSM also determined that transitioning the Project Based properties back to a traditional PBV rent calculation process would be more beneficial to the program participants at the time of the properties submission of an annual contract rent increase.

HACSM has not received any hardship requests in relation to the TST rent reform program during FY19.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 Outcome	FY19 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	\$65,474	\$78,251	\$67,867	\$91,452	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	FY19 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
			\$74,474						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	1,338 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.	Approximately 3% of the files file review	Benchmark achieved	
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	\$2, 130,007	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 \$25, 566	\$256 per year (a 1% increase)	In FY15, the average earned income per household was \$20,773, a \$5,203 decrease	\$21,897 per household	\$23,068 per household	\$24,406	\$33,812	Benchmark achieved	

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 Outcome	FY19 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
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	1,926	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%	69%	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	1,586	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%	17%	Benchmark achieved	

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 Outcome	FY19 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	143	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	52 households due to graduation from MTW programs, and 20 due to income increases such that there was no HAP paid for a period of 90 days In total: 72 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	FY19 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	2,370	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	52 Hours	Benchmark Achieved	The number of annual inspections was higher this year due to higher than normal turnover rates at one of the properties.
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%	Average error rate in completing HQS inspections at HACSM-owned properties was 0%	Benchmark Achieved	N/A

Changes to the metrics, baselines or benchmarks

HACSM 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 FY19, 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.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 Outcome	FY19 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE #1: Agency Cost Savings									
Total cost of task in dollars	On average, the cost to complete HQS inspections prior to implementation: \$195,046	HACSM expects that it will cost no more than \$100,000 (annually) to complete HQS inspections	Actual cost to conduct HQS inspections: \$55,976	\$111,471	\$138,960	\$64,841	\$137,703	Benchmark Achieved	As discussed in the FY16 Annual Report, when HACSM established the benchmark for this activity, it did not consider the increased costs due to increased salary and benefits. If those annual increases due to cost of living are taken into consideration, this activity has met its expected outcome.
CE #2: Staff Time Savings									
Total time to complete task in	On average, it required 4,157 hours	HACSM expects that will require	Actual amount of	2026 Hours	2527 Hours	2,490 Hours	2,399 Hours	Benchmark Achieved	N/A

staff hours	annually to complete the annual HQS inspections prior to implementation	2,161 hours to complete HQS inspections on an annual basis	total staff time dedicated to complete HQS inspections: 1,952 hours						
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%	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, 2019, HACSM has established project based contracts and commitments for approximately 34% of its HCV portfolio.

As discussed in Activity 2010-9: Tiered Subsidy Tables (TST), in FY19, as part of its' on-going program monitoring, HACSM conducted a review of the participant rent portions and the on-going HCV budget and determined that using the traditional PBV rent calculation is more beneficial to the program participants. This transition was effective at the time of the properties submission of an annual contact rent increase.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 Outcome	FY19 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	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

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 Outcome	FY19 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
									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	N/A	HACSM has not realized staff time savings as a result of this MTW activity.
HC #4: Displacement Prevention									
Number of households at or below 80% AMI that would lose assistance or need to move (decrease). If the units reach a specific type of household, HACSM will give that type here.	There were zero (0) households losing assistance/moving prior to implementation of the activity	Zero (0) households are expected to lose assistance or be required to move after implementation	In FY15, zero (0) households have lost their housing assistance or been required to move due to this activity	In FY16, zero (0) households have lost their housing assistance or been required to move due to this activity	In FY17, zero (0) households have lost their housing assistance or been required to move due to this activity	In FY18, zero (0) households have lost their housing assistance or been required to move due to this activity	In FY19 zero (0) households have lost their housing assistance or been required to move due to this activity	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 #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 FY19, approximately 6,377 households had submitted a pre-application and HACSM randomly selected 1200 households for the waitlist. HACSM subsequently interviewed 534 households for initial eligibility determinations, the remainder either had already located other housing options or did not respond to the interview appointment letter.

In FY19, four 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	FY19 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	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	FY19 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	\$2,016	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	35 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%	Average error rate: 0%	Benchmark achieved	As reported in FY14, HACSM is unable to provide a baseline for this metric, as this date was not collected prior to implementation of the activity. Also, due to the fact that staff do not collect, verify, or include in the calculation of the household annual adjusted income, the on-going error rate is 0%.

Changes to the metrics, baselines or benchmarks

HACSM 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 FY19, 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	FY19 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	In FY19 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	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 FY19, there were 262 households with Full Time Students between the ages of 18-24. On average, HACSM excluded \$12,160 for these households.

In FY19 there were an additional 53 households with full time students over the age of 24, with an average earned income of approximately \$12,515 per household, that was included in the households, gross annual income.

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	FY19 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	\$12,515	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 FY19, there were three households that included foster children. 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	FY19 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	N/A	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 FY19, 36 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	FY19 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	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 FY19, 31 households reached “zero HAP” status, 20 households exited the program, and 11 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	FY19 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	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, 2019, \$10,000,000 of the MTW funds have been awarded to eight developments, which will provide 412 units of new, high-quality affordable housing for low, very low, and extremely low-income households. 118 of these units are already completed and leased, with another 153 in construction. The \$10,000,000 in MTW funding have leveraged approximately \$230 million in other sources of financing for these units.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 Outcome	FY19 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
HC #1: Additional Units of Housing Made Available									
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household, HACSM will provide that information here.	Est. FY11, Zero (0) housing units of this type prior to implementation of this activity.	HACSM expects the creation of at least 20 affordable units per \$1,000,000 invested	In FY 15, 115 senior housing units at Half Moon Village Phase II were made available after implementation of the activity	126 units	60 units	40 units	0 units	Benchmark Achieved	N/A

HC #2: Units of Housing Preserved									
Number of housing units preserved for households at or below 80% AMI as a result of the activity.	Housing units preserved prior to implementation (0)	Expected housing units preserved after implementation 60	In FY15, 15 senior housing units were preserved after implementation	0 housing units	0 housing units	0 housing units	0 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.	\$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 #2011-27: 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. Currently HACSM has four contracts with service providers supporting the following hard to reach populations, 1) Survivors of domestic violence, 2) Recently released, non-violent parolees, 3) Single parent households with minor children, and 4) Frail elderly 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. 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.

Impact of the activity

In late FY19 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	FY19 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	69 households	Benchmark Achieved	N/A
SS #1: Increase in Household Income									
Average earned income of households (\$)	Average earned income of households affected by this	HACSM expects the average earned income of households	In FY15, the actual average earned	\$1,172	\$897.97	\$1,030	\$1,278	Benchmark Achieved	N/A

	policy prior to implementation was \$0	affected by this policy to be \$900	income of households affected by this policy was \$1,032						
SS #3: Increase in Positive Outcomes in Employment Status (Based on Head of Household Information)									
Other: Employment	Number of HOH employed was zero (0)	HACSM expects that 20 HOH will be employed after implementation	In FY15, 38 HOH were employed	52	35	31	32	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%	59%	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	56	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%	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	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.	** 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 FY19, this activity resulted in approximately \$6,189 child care expenses that were disregarded due to exceeding the policy limits. There were 146 households that claimed child care expenses for deduction. The average amount per household that was deducted from the household's annual adjusted income was \$5,695.

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	FY19 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	\$2,130,007	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 FY19, there were 105 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	FY19 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	7,536	Benchmark achieved	N/A
CE #2: Staff Time Savings									
Total time to complete the task in staff hours	In FY14, the total time to complete this task prior to implementation:	160 Benchmark updated from 83	In FY15 the time to complete this task	159	142	135	109	Benchmark achieved	N/A

	166 hours	hours to 160 hours, effective FY16)	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%	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	\$2,130,007	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 ongoing 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 FY19, 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	FY19 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	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. 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	FY19 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	\$1,955	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	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	\$2,130,007	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 FY19. 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	FY19 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE #1: Agency Cost Savings									
Total cost of task in dollars	In FY14, it required \$15,570 to complete this task	HACSM expects that the cost to complete this task after implementation to be no more than \$6,218	N/A	N/A	N/A	N/A	N/A	N/A	N/A
CE #2: Staff Time Savings									
Total time to complete the task in staff hours	In FY14, it required 298 hours to complete this	HACSM expects that after implementation it will require 119	N/A	N/A	N/A	N/A	N/A	N/A	N/A

	task	hours to complete this task							
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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 #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 FY19, 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 34 MTW families through the course of the year. In FY19 HACSM has spent approximately \$61,999 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 FY19, 58 new landlords have joined the program, 104 landlords have received the "No Loss Bonus", and 20 Landlords have received a continuity bonus.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	FY16 Outcome	FY17 Outcome	FY18 Outcome	FY19 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	58	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	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	68	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	62 Households 34 – Abode Assistance 28 – HACSM Renting Success Workshop	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:	Number of HOH	Expected number of	Actual number	12	15	12	Benchmark	N/A

Employment	employed: 22	HOH employed: 22	of HOH employed after implementation: 16				achieved	
	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 of Section 8 /Section 9 subsidy per household	Average subsidy per household affected by this policy prior to implementation:	Expected average subsidy per household affected by this policy after	Actual average subsidy per household: \$1,123	\$44.54	\$31.21	\$35.13	Benchmark achieved	Based on a total of \$5,270 in operating subsidy from HUD, for the 30 units at EI

affected by this policy	\$1,123	implementation: \$1,123						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 MANAGEMENT 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.

MTW Annual Report FY2019

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

09/26/2019
Date

Housing Authority of the County of San Mateo

Appendix I
HACSM Hardship Policy

Chapter 24

HARDSHIP POLICY FOR MTW INITIATIVES

I. INTRODUCTION

HACSM's Hardship Policy is designed to address the following MTW initiatives:

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*
- *Child Care Expense Deduction*
- *Minimum Tenant Rent*

B. Time limited assistance

- *Extension of Program Participation*

C. Portability (Moving Out of San Mateo County)

- *Current Program Participants*
- *New Program Applicants*

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**

To qualify for hardship exemptions, households must meet all 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**

To qualify for hardship exemptions, households must meet all 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)**

To qualify for hardship exemptions, households must meet all 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**

To qualify for hardship exemptions, households must meet all 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**

To qualify for hardship exemptions, households must meet all 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 repayment 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**

To qualify for hardship exemptions, households must meet all 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 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/triennial 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.

• Minimum Tenant Rent

HACSM's minimum tenant rent, without consideration of utility allowance, shall be \$100 effective August 1, 2016. The new minimum rent shall apply to the next 50058 change (unit/household/subsidy/contract rent). HACSM may adjust the amount of minimum tenant rent through future MTW Annual Plan processes.

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 prior to August 1, 2016 and paid \$50 immediately prior to August 1, 2016 as a result of the HACSM's minimum rent policy.
4. The tenant rent portion, after applying the new minimum rent, is greater than 30% of the household's monthly adjusted income without consideration of utility allowance.

5. 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.
6. The household has not previously received a hardship relief for the current minimum rent increase.

Approval Process for Minimum Rent Initiative

- 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 based on the new minimum rent and hardship policy and forward the result and the recert, interim, or rent increase package 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 Rental Programs Manager.

Hardship Relief for Minimum Rent Initiative

Households who qualify and receive waiver approval may pay \$50 as their portion of rent until their next annual/triennial recertification, interim due to increase in income or change in family composition, or relocation. At the next annual/triennial recertification, interim due to increase in income or change in family composition, or relocation, the household will automatically be subject to HACSM’s minimum rent at that time.

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 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 rental 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 MTW 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. Households who meet qualification number 4 above must include the following information in the hardship request (all four items must be addressed):
 - 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.
2. The Family Self-Sufficiency Coordinator will review the request promptly and forward the file to the supervisor with his/her recommendation.
3. The Supervisor approves the extension if there are no other issues.

Hardship Relief for Extension of Program Participation

1. For households who meet qualification 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 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.

In all instances, the extension period will be affected by changes in the family circumstances, for example, changes in family composition. If the family no longer meets the qualifications stated above after the change, the extension will be terminated (i.e. housing subsidy ends) 60 days from the effective date of the change. Decisions reached by HACSM will be final.

4. Decisions reached by HACSM will be final.

C. Portability (Moving out of San Mateo County)

Current Program Participants 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 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 nearest 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 is a full-time student at an accredited educational institution located more than 35 miles beyond the nearest 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

1. All requests 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.
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.
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.

Hardship Relief for Portability

For households who meet any of the qualification numbers 1 - 4, the Housing Authority may approve the household's request for portability.

Decisions reached by HACSM will be final.

"New Voucher holders" refers to households who have not yet leased a unit in San Mateo County from the MTW Wait List and 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

1. All applications will be reviewed for completeness.
2. The RA will be reviewed for completeness and nexus determination approval.
3. The Housing Programs Specialist will review the request promptly and forward 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

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 7/1/2019

New-Move TST Effective 7/1/19
 EXCLUDED PROPERTY TYPES FOR CERTAIN HOUSING PROGRAMS*

*Excludes project-based properties

L	H	0	1	2	3	4	5	S
0	1,999	1941	2408	2987	3921	4148	4774	1455
2,000	4,999	1878	2345	2924	3458	4085	4711	1408
5,000	7,999	1803	2270	2849	3783	4010	4636	1352
8,000	10,999	1728	2195	2774	3708	3935	4561	1296
11,000	13,999	1653	2120	2699	3633	3860	4486	1239
14,000	16,999	1578	2045	2624	3558	3785	4411	1183
17,000	19,999	1503	1970	2549	3483	3710	4336	1127
20,000	22,999	1428	1895	2474	3408	3635	4261	1071
23,000	25,999	1353	1820	2399	3333	3560	4186	1014
26,000	28,999	1278	1745	2324	3258	3485	4111	958
29,000	31,999	1203	1670	2249	3183	3410	4036	902
32,000	34,999	1128	1595	2174	3108	3335	3961	846
35,000	37,999	1053	1520	2099	3033	3260	3886	789
38,000	40,999	978	1445	2024	2958	3185	3811	733
41,000	43,999	903	1370	1949	2883	3110	3736	677
44,000	46,999	828	1295	1874	2808	3035	3661	621
47,000	49,999	753	1220	1799	2733	2960	3586	564
50,000	52,999	678	1145	1724	2658	2885	3511	508
53,000	55,999	603	1070	1649	2583	2810	3436	452
56,000	58,999	528	995	1574	2508	2735	3361	396
59,000	61,999	453	920	1499	2433	2660	3286	339
62,000	64,999	378	845	1424	2358	2585	3211	283
65,000	67,999	303	770	1349	2283	2510	3136	227
68,000	70,999	228	695	1274	2208	2435	3061	171
71,000	73,999	153	620	1199	2133	2360	2986	114
74,000	76,999	78	545	1124	2058	2285	2911	58
77,000	79,999	3	470	1049	1983	2210	2836	2
80,000	82,999	0	395	974	1908	2135	2761	0
83,000	85,999	0	320	899	1833	2060	2686	0
86,000	88,999	0	245	824	1758	1985	2611	0
89,000	91,999	0	170	749	1683	1910	2536	0
92,000	94,999	0	95	674	1608	1835	2461	0
95,000	97,999	0	20	599	1533	1760	2386	0
98,000	100,999	0	0	524	1458	1685	2311	0
101,000	103,999	0	0	448	1383	1610	2236	0
104,000	106,999	0	0	374	1308	1535	2161	0
107,000	109,999	0	0	299	1233	1460	2086	0
110,000	112,999	0	0	224	1158	1385	2011	0
113,000	115,999	0	0	149	1083	1310	1936	0
116,000	118,999	0	0	74	1008	1235	1861	0
119,000	121,999	0	0	0	933	1160	1786	0
122,000	124,999	0	0	0	858	1085	1711	0
125,000	127,999	0	0	0	783	1010	1636	0
128,000	130,999	0	0	0	708	935	1561	0
131,000	133,999	0	0	0	633	860	1486	0
134,000	136,999	0	0	0	558	785	1411	0
137,000	139,999	0	0	0	483	710	1336	0
140,000	142,999	0	0	0	408	635	1261	0
143,000	145,999	0	0	0	333	560	1186	0
146,000	148,999	0	0	0	258	485	1111	0
149,000	151,999	0	0	0	183	410	1036	0
152,000	154,999	0	0	0	108	335	961	0
155,000	157,999	0	0	0	33	260	886	0
158,000	160,999	0	0	0	0	185	811	0
161,000	163,999	0	0	0	0	110	736	0
164,000	166,999	0	0	0	0	35	661	0
167,000	169,999	0	0	0	0	0	586	0
170,000	172,999	0	0	0	0	0	511	0