

Housing Authority of the County of San Mateo

FY 2022 Moving To Work Annual Report



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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 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. 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 23rd year in the MTW program. With the lessons learned, the successes realized, and the growth and positive changes for the households we serve, the three MTW 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 San Mateo County (SMC) Departments and organizations to address the goal of ending homelessness in the local community, expanded and sharpened its focus on activities that increase 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 SMC residents through program innovation and responsiveness. In addition to the MTW program, HACSM actively participates with SMC 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, FY2022 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 and local sources to further expand this effort.

While the San Francisco Bay Area is sought after in terms of financial opportunity, the on-going and persistent homelessness is a real and present challenge. In the midst of this pervasive housing challenge, the MTW program has provided HACSM with the crucial flexibility to continue its support in affordable housing development and to collaborate with community partners to end homelessness and expand housing opportunity for low-income families.

Following are examples from FY2022 that further demonstrate the HACSM continued commitments to increasing affordable housing choice, supporting self-sufficiency goals of program participants, and developing administrative efficiencies.

Increasing Affordable Housing Choices

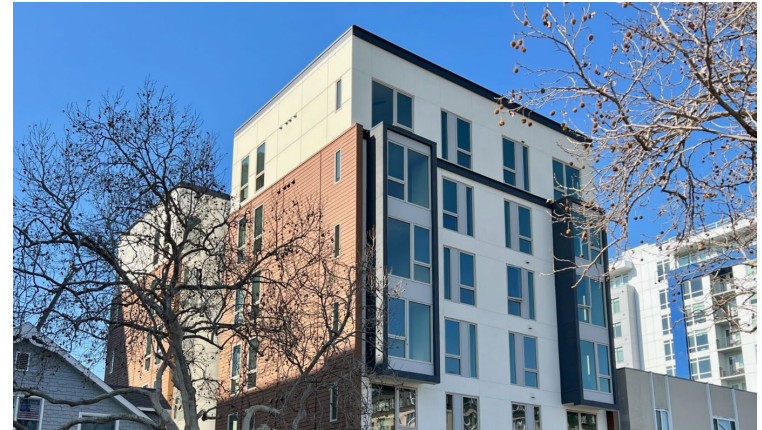
During FY2022 the San Mateo County Board of Supervisors, the governing board for the Housing Authority, considered housing as one of, if not the biggest critical need in the County. HACSM, along with the SMC Housing & Community Development Division, were key stakeholders in developing creative solutions 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 Section 8 Housing Choice Vouchers for project-basing 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.

Here are two examples of new construction/substantial rehabilitation projects that were completed:

612 Jefferson

Located in Redwood City, CA, this complex of 20 townhomes in downtown Redwood City is a great example of how Habitat can take a small parcel of land and, through innovative design, maximize the number of homes being built. The complex density is 174 dwelling units per acre. All 20 townhomes are homeownership units, owned by households with incomes not exceeding 80% of the area median income. Construction was completed in the summer of 2022 and property is now fully occupied.

The Housing Authority leveraged \$80,000 from the Affordable Housing Fund (MTW Activity# 2012-26), and \$1 million from Community Development Block Grant (CDBG) funds from HUD to assist in the development of the property.



Walnut Studios



This project includes 24 affordable apartments just south of downtown San Carlos. The units serve households at very low and extremely low-income levels, which boost the city's affordable housing stock. The building features 20 parking spaces, bike storage, community room, laundry facilities, and outdoor terraces. The project is located just two blocks from Rt. 82 (El Camino Real), a block away from the shops on Laurel St, and walking distance to the San Carlos CalTrain station. Construction was completed in the spring of 2022, and the property is now fully leased.

The Housing Authority leveraged \$600,000 from the Affordable Housing Fund (MTW Activity# 2012-26) to assist in the development of the property.

Promoting Self-Sufficiency

In FY2022, over 77% of the non-elderly/disabled MTW households participated in the Family Self-Sufficiency (FSS) Program with an active Individual Goal Plan. The FSS families meet with HACSM Family Self-Sufficiency Coordinators at least once every four months through virtual meetings, phone calls, email check ins 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 FY2022, HACSM continued the expansion of its five-year, MTW Self-Sufficiency program. In FY2022, all new applicants from the waiting list were offered to join the Self-Sufficiency program. These new program participants have access to greatly expanded and enriched case management services and to at least biannual connections with their Self-Sufficiency Coordinators. As discussed in detail in this report, the initiative also includes a comprehensive hardship policy for elderly and/or disabled persons as well as for self-sufficiency participants who need some additional time to achieve their goals.

Expand Affordable Housing Partnerships and Project-Based Programs

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

HACSM works with various community partners to provide wrap around services to our participants. Our community partners share invitations to their public events to us to connect our participants to, such as job fairs and other educational workshops. In addition, they also provide exclusive workshops for our participant families. In the FY 2021 – 2022 HACSM held exclusive live webinars such as the Drive Forward Program – Electric Vehicle Loan Program presented by Peninsula Family Services in partnership with Peninsula Clean Energy, Credit Repair presented by Samaritan House, Money Management presented by Peninsula Family Services, a two-part series on First Time Homebuyers presented by First Tech Federal Credit Union and continue to plan for future workshops for the coming year. Through our regular contact with our households they receive information on services and gain linkages with organizations to assist with but are not limited to financial education, understanding and improving their credit, connection to savings match programs, early learning, immigration and legal services, housing, training, resume writing, interviewing skills and employment opportunities.



2022 marks the 5th collaboration with San Mateo Credit Union (SMCU) on the Backpack Drive. The purpose of this wonderful collaborative effort is to bring some relief and joy to the families and communities we serve. SMCU utilized funds raised by their staff to purchase over 100 backpacks which were donated to HACSM. The back packs provided by SMCU were prefilled with all the necessities such as color pencils, pens, pencils, erasers, glue sticks, scissors, highlighters, rulers, pencil sharpeners, pencil cases, notebooks and folders. HACSM reached out to participant families and offered the backpacks on a first come, first serve basis. Using books donated in partnership with the Library and the Book Rich Environment, HACSM also gave away books at the event to families with children in addition to the backpacks and



supplies. The event was done as an outdoor event following COVID safety guidelines. The parents and children expressed how very thankful they were for the help especially in these difficult times. The backpack distribution was a successful event with many eager and grateful families showing up to collect their items.

SECTION II - General Operating Information

This section provides an overview of HACSM's housing portfolio, leasing, and waiting list information.

Actual New Project Based Vouchers (PBVs)

Property Name	No. of PBVs		Status At End of Plan Year	RAD?	Description of Project
	Plan	Actual			
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. HACSCM opened the Project's Waiting List in March 2022 and closed in May 2022 in anticipation of the Project's completion in January 2023.
965 Weeks Street	15	15	Committed	No	965 Weeks Street is a 136-unit new construction development in E. Palo Alto, CA. HACSM has committed 15 Section 8 PBVs to the project. The project is in the process of securing financing.
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 in the process of securing financing.

Property Name	No. of PBVs		Status At End of Plan Year	RAD?	Description of Project
	Plan	Actual			
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. HACSCM opened the Project's Waiting List in March 2022 and closed in May 2022 in anticipation of the Project's completion in October 2022.
Gateway at Millbrae	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 construction is expected to complete in September 2022.
Grand & Linden Family Apts.	55	55	Committed	No	Grand & Linden Family Apartments is an 84-unit new construction development in So. San Francisco, CA. HACSM has committed 55 Section 8 PBVs to the project. 13 of the 55 PBV units will serve people with disabilities who require supportive services in order to maintain housing. Construction is underway and is expected to complete in early 2023.
Kiku Crossing (formerly known as Downtown San Mateo Opportunity Sites)	80	80	Committed	No	Downtown San Mateo Opportunity Sites is a 234-unit new construction development in San Mateo, CA. HACSM has committed 80 Section 8 PBVs to the project. Construction is underway.

Property Name	No. of PBVs		Status At End of Plan Year	RAD?	Description of Project
	Plan	Actual			
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. HACSCM opened the Project’s Waiting List in March 2022 and closed in May 2022 in anticipation of the Project’s completion in October 2022.
Middlefield Junction	44	44	Committed	No	Middlefield Junction is a 179-unit new construction development in Redwood City, CA. HACSM has committed 44 Section 8 PBVs to the project. 20 of the 44 PBV units will serve people with disabilities who require supportive services in order to maintain housing. The project is in the process of securing financing.

433

433

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

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

The following Project-Based projects experienced construction delays; 353 Main Street, Firehouse Square, Light Tree Apartments, Gateway at Millbrae, and Grand & Linden Family Apartments. These projects are now anticipated to be leased and issued in FY2023.

Actual Existing Project-Based Vouchers

Property Name	No. of PBVs		Status At End of Plan Year	RAD?	Description of Project
	Planned*	Actual			
636 El Camino	47	47	Leased/Issued	No	A family property including 20 MHSA units, located in South San Francisco
Alma Point	33	33	Leased/Issued	No	A senior property located in Foster City
Arroyo Green	99	99	Leased/Issued	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.
Coastside Senior Housing	39	39	Leased/Issued	No	A senior property located in Half Moon Bay
Colma Veterans Housing	65	65	Leased/Issued	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) 7 Section 8 PBVs.
Delaware Pacific	30	30	Leased/Issued	No	A family property including 10 MHSA units, located in San Mateo.
Delaware Place	16	16	Leased/Issued	No	A family property located in San Mateo.
Edgewater Isle	91	91	Leased/Issued	No	A senior property located in San Mateo.

Property Name	No. of PBVs		Status At End of Plan Year	RAD?	Description of Project
	Planned*	Actual			
El Camino Village	30	30	Leased/Issued	Yes	A family property located in Colma. 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.
Fair Oaks Common	59	59	Leased/Issued	No	Fair Oaks Commons 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.
Gateway Apartments	81	81	Leased/Issued	No	A family property located in Menlo Park. Gateway is a formerly Mod Rehab property.
Half Moon Village	114	114	Leased/Issued	No	A senior property located in Half Moon Bay.
Hillside Terrace	18	18	Leased/Issued	No	A family property located in Daly City.
Magnolia Plaza	48	48	Leased/Issued	No	A senior property located in South San Francisco.
Midway Village	150	150	Leased/Issued	No	A formerly Public Housing family project, located in Daly City.

Property Name	No. of PBVs		Status At End of Plan Year	RAD?	Description of Project
	Planned*	Actual			
Montara (formerly known as Bay Meadows)	46	46	Leased/Issued	No	Montara 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.
Mosaic Garden	39	39	Leased/Issued	No	A family property located in Redwood City. Of the 39 PBV units, 9 are HUD-VASH PBVs.
Newell Housing	10	10	Leased/Issued	No	A family property located in East Palo Alto.
Oceanview	31	31	Leased/Issued	No	A senior property located in Pacifica.
Pacific Oaks	50	50	Leased/Issued	No	A senior property located in Pacifica.
Redwood Oaks	33	33	Leased/Issued	No	A family property located in Redwood City.
Rotary Terrace	8	8	Leased/Issued	No	A senior property located in South San Francisco. All 8 units serve seniors with dual eligibility from Medicaid and The Health Plan of San Mateo.
Sequoia Belle Haven	69	69	Leased/Issued	No	A senior property, located in Menlo Park.
St. Matthew	18	18	Leased/Issued	No	A family property, located in San Mateo.
Sweeney Lane	26	26	Leased/Issued	No	A family property, located in Daly City.

Property Name	No. of PBVs Planned* Actual		Status At End of Plan Year	RAD?	Description of Project
The Woodlands	13	13	Leased/Issued	No	A family property, located in East Palo Alto.
Willow Terrace	11	11	Leased/Issued	No	A family property, located in Menlo Park.
1274		1274	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

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

N/A

General Description of All Actual Capital Expenditures During the Plan Year

HACSM no longer has Public Housing. We received \$0 in operating subsidy, \$0 in capital funds, and \$0 for RHF

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	N/A	N/A	N/A	N/A
MTW Housing Choice Vouchers (HCV) Utilized	51,708	49,392	4,309	4,064
Local, Non-Traditional: Tenant-Based	180	132	15	11
Local, Non-Traditional: Property- Based	636	492	53	41
Local, Non-Traditional: Homeownership	N/A	N/A	N/A	N/A
Planned/Actual Totals	52,524	50,016	4,477	4,116

* “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.

Describe any differences between the planned and actual households served:

The differences between the planned and actual households served were due unit turnovers and program admissions and exits.

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	180	132	15	11
Property-Based	Provider Based Assistance Program / Activity #2011-27	636	492	53	41
Homeownership	N/A	0	0	0	0
Planned/Actual Totals:		816	624	68	52

* 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	0	0

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

HOUSING PROGRAM	DESCRIPTION OF ACTUAL LEASING ISSUES AND SOLUTIONS
MTW Housing Choice Voucher	<p>All residents of San Mateo County continued to experience an extremely tight rental market and high rents. One of the persistent challenges is that voucher holders must 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>HACSM has continued to offer the Renting Success Workshop virtually due to the COVID 19 pandemic, to all voucher holders to share new methods and approaches for a successful housing search. Additionally, 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	14380	Open	Yes
Federal MTW Housing Choice Voucher Program (Project-Based, 353 Main Street)	Site Based	1012	Closed	Yes
Federal MTW Housing Choice Voucher Program (Project-Based, 636 El Camino)	Site Based	2788	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Alma Point)	Site Based	106	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Arroyo Green Senior Housing)	Site Based	294	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Coastside Senior Housing)	Site Based	244	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Colma Veterans Village)	Site Based	42	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Delaware Place)	Site Based	2206	Closed	No

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 (Project-Based, Delaware Pacific)	Site Based	618	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Edgewater Isle)	Site Based	325	Closed	Yes
Federal MTW Housing Choice Voucher Program (Project-Based, Fair Oaks Commons)	Site Based	907	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Firehouse Square)	Site Based	2327	Closed	Yes
Federal MTW Housing Choice Voucher Program (Project-Based, Gateway Apartments)	Site Based	2692	Closed	Yes
Federal MTW Housing Choice Voucher Program (Project-Based, Half Moon Village)	Site Based	316	Closed	Yes
Federal MTW Housing Choice Voucher Program (Project-Based, Hillside Terrace)	Site Based	302	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Light Tree	Site Based	2204	Closed	Yes

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 (Project-Based, Magnolia Plaza)	Site Based	254	Closed	Yes
Federal MTW Housing Choice Voucher Program (Project-Based, Midway Village)	Site Based	2602	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Montara)	Site Based	1816	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Mosaic Garden)	Site Based	708	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Newell)	Site Based	1902	Closed	Yes
Federal MTW Housing Choice Voucher Program (Project-Based, Oceanview)	Site Based	215	Closed	Yes
Federal MTW Housing Choice Voucher Program (Project-Based, Pacific Oaks)	Site Based	220	Closed	Yes
Federal MTW Housing Choice Voucher Program (Project-Based, Redwood Oaks)	Site Based	2045	Closed	Yes

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 (Project-Based, Rotary Terrace)	Site Based	249	Closed	Yes
Federal MTW Housing Choice Voucher Program (Project-Based, Sequoia Belle Haven)	Site Based	400	Closed	Yes
Federal MTW Housing Choice Voucher Program (Project-Based, St. Matthew)	Site Based	25	Open	No
Federal MTW Housing Choice Voucher Program (Project-Based, Sweeney Lane)	Site Based	591	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Serenity Senior Housing)	Site Based	206	Closed	Yes
Federal MTW Housing Choice Voucher Program (Project-Based, Willow Terrace)	Site Based	2200	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, The Woodlands)	Site Based	1197	Closed	No
RAD PBV (Formerly Public Housing Midway Village)	Site Based	153	Closed	No

Describe any duplication of applicants across waiting lists:

In addition to the Housing Choice Voucher Program, HACSM has site-based waiting lists for its Project Based Properties. Household can choose to apply for multiple waiting lists thus resulting in 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

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	25

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.

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

N/A

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%	1935	47%	9%
2 Person	27%	1114	27%	0%
3 Person	15%	434	10%	-5%
4 Person	11%	325	8%	-3%
5 Person	5%	196	5%	0%
6+ Person	4%	112	3%	-1%
TOTAL	100%	4116	100%	0%

** 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.

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

During FY 2022 HACSM did not pull any applicants from the Federal MTW Housing Choice Voucher Program Wait List. Approximately 75% of the households that exited the program in FY2022 were households with 2 or more household members. In addition, approximately 74% of HACSM's PBV portfolio's is SRO, studio or 1-bedroom units.

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	156	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	34	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	Included in row 1 & 2 above	The household reached an income level such that HACSM paid \$0 subsidy for a maximum period of 90 days.
	190	(Households Duplicated Across MTW Activities)
	190	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.

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.

SECTION III: Proposed MTW Activities

All proposed activities that are granted approval by HUD are reported on in Section IV as 'Approved Activities. No new activities are proposed at this time.

SECTION IV: Approved MTW Activities

A. Implemented Activities

MTW Activity Number	MTW Activity Title
2000 – 1	MTW Self-Sufficiency Program
2000 – 3	Eliminate 40% Affordability CAP at Initial Move-In/Lease Up
2009 – 2	Housing Readiness Program (HRP)
2010 – 6	Triennial Recertification Schedule for Elderly/Disabled Families
2010 – 7	Simplify Rent Calculation Process

MTW Activity Number	MTW Activity Title
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

MTW Activity Number	MTW Activity Title
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	Leasing Success Program
2018 – 36	Homeless Young Adults with Disability Program

Activity #2000-1: MTW Self-Sufficiency Program

Approved by HUD: FYE2000
Implemented by HACSM: 5/1/2000
Amended: N/A

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 San Mateo County (SMC) Human Service Agency to respond to the welfare reforms of the Clinton presidency. It 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 FY2010 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 welfare and social service departments, drug treatment facilities, 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 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, eliminating the direct referral process; 2) All new program participants from the HACSM HCV waiting list are automatically invited to enroll in the MTW Self-Sufficiency program, and 3) HACSM expanded the number of vouchers allocated to the 5-year time limited program from 300 up to 800 vouchers.

With the exception of elderly and disabled households, all MTW Self-Sufficiency participants are required to participate in the HACSM Family Self-Sufficiency (FSS) program with the goal of helping 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 could be 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 FY2014, 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, childcare, 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 FY2022, a total of 610 households received rental subsidy under the MTW Self Sufficiency Program. Of that total, 317 households have an active Contract of Participation and received self-sufficiency services. During the same period, 156 families had successfully graduated from the program.

Although not a part of the Standard Metrics, HACSM has also been monitoring the housing outcomes for families exiting the program. In FY2022, of the 156 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.

There were 193 families who requested a hardship program extension in FY2022. Based on the HACSM's hardship policy, 189 requests were approved.

Standard HUD Metrics

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
SS #1: Increase in Household Income				
Average earned income of households affected by this policy in dollars (increase)	As established in FY2010, the average earned income of households at entry was \$17,858	Expected increase in average earned income of \$500 annually of households affected by this policy prior to implementation.	Average earned income per households is \$40,261	Yes
SS #2: Increase in Household Savings				
Average amount of savings/escrow of households affected by this policy in dollars (increase)	As established in FY2013, the average savings per household was \$569	Expected \$100 increase in savings per household	Average Savings per household is \$3,880	Yes
SS #3: Increase in Positive Outcomes in Employment Status (Household)				
Employed Full Time	In FY2013, 9 households who graduated from the program were employed full time at program entry	Expected number of households employed full time: 15	137	Yes
Employed Part Time	FY2013, 2 households who graduated from the program were employed part time at program entry	Expected number of households employed part time: 10	81	Yes
Enrolled in an Educational Program	FY2013, 5 households who graduated from the program were enrolled in an education program	Expected number of households enrolled in education program: 10	157	Yes
Enrolled in Job Training	FY2013, 5 households who graduated from the program were enrolled in a job training program	Expected number of households enrolled in job training program: 10	120	Yes

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Unemployed	FY2013, 8 households who graduated from the program were unemployed at program entry	Expected number of households unemployed: 10	99	No ¹
SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)				
Number of households receiving TANF assistance (decrease)	131 families were receiving TANF at program entry. In FY2013, 83 families were receiving TANF	Decrease in the number of families receiving TANF by 10 families per year	29	Yes
SS #5: Households Assisted by Services that Increase Self-Sufficiency				
Number of households receiving services aimed to increase self-sufficiency (increase)	In FY2013, 19 families completed financial, employment, and educational workshops	HACSM expects 30 of the households receiving self-sufficiency services after implementation	317	Yes
SS #6: Reducing Per Unit Subsidy Costs for Participating Households				
Average amount of Section 8 and/or 9 subsidy (or local, non-traditional subsidy) per household affected by this policy in dollars (decrease)	In FY2012, the average amount of Section 8 subsidy per household was \$1,331	HACSM expects the average subsidy per household after implementation to remain consistent at \$1,331	\$2,078	No ²
SS #8: Households Transitioned to Self-Sufficiency				
Number of households transitioned to self-sufficiency (increase)	0 households transitioned to self-sufficiency prior to implementation	Expected number of households transitioned to self-sufficiency: 10/year	156	Yes
* Narrative of Challenges, if not Achieved and Potential New Strategy				
¹ <i>Unemployed:</i> (1) The unemployed number fluctuates from year to year because HACSM continues to admit new households to the program. For example, newly				

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
<p>admitted households who are unemployed are also added to the total. HACSM expects the outcome will improve as these families gain employment during their terms of assistance. (2) The COVID pandemic has hugely affected job opportunities for the MTW Self-Sufficiency participants.</p> <p>² <i>Average amount of Section 8 subsidy per household:</i> In FY2022, the HACSM housing market continued to represent one of the most expensive in the nation. The trend has continued over multiple years, and as such the average subsidy for the program is in alignment with San Mateo County as a whole.</p>				

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
Amended: N/A

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, whether HCV applicants leasing up for the first time, or 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 FY2022, San Mateo County continued to be one of the highest cost of living communities in our nation. Current participants and new

voucher holders 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 the reporting period, 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. 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. This is an additional step that HACSM staff take to support the household on a case-by-case basis. In FY2022, HACSM denied 2 Request for Tenancy Approvals due to affordability. Without this activity, the reality of finding a unit would be even more bleak with the current San Mateo County housing market.

Standard HUD Metrics

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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 (increase).	0 families.	HACSM expects that 20 households will be able to move to a better unit and/or neighborhood of opportunity after implementation	145	Yes
Narrative of Challenges, if not Achieved and Potential New Strategy				

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
Amended: N/A

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 who may not otherwise qualify other homeless programs. 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 are encouraged to join the FSS program and meet with the FSS Coordinators to establish their goal plan and execute an FSS Contract of Participation. These households are also eligible for escrow monies upon successful graduation from the FSS program.

Impact of the activity

In FY2022, a total of 87 households received rental subsidy under the MTW Housing Readiness Program. Of that total, 53 households have an active Contract of Participation and received self-sufficiency services. During the same period, 7 families had successfully graduated from the program.

There were 36 families who requested a hardship program extension in FY2022. Based on the HACSM's hardship policy, 34 requests were approved.

Standard HUD Metrics

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
SS #1: Increase in Household Income				
Average earned income of households affected by this policy in dollars (increase)	Average earned income of households affected by this policy in FY2013 was \$19,339	Expected average earned income in households affected by this policy after implementation is \$20,500	\$38,474	Yes
SS #2: Increase in Household Savings				
Average amount of savings/escrow of households affected by this policy in dollars (increase)	Average savings per household at program entry in FY2013 was \$249	Expected increase in savings per household: \$100	\$2,661	Yes
SS #3: Increase in Positive Outcomes in Employment Status (Household)				
Employed Full Time	In FY2012, 11 households employed full time	Expected number of households employed full time: 11	13	Yes
Employed Part Time	In FY2012, 12 households employed part time	Expected number of households employed part time: 10	12	Yes
Enrolled in an Educational Program	In FY2012, 0 households enrolled in an education program	Expected number of households enrolled in education program: 10	21	Yes
Enrolled in Job Training	In FY2012, 0 households enrolled in a job training program	Expected number of households enrolled in job training program: 10	17	Yes
Unemployed	In FY2012, 11 households unemployed	Expected number of households unemployed: 10	28	No ¹
SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)				
Number of households receiving TANF assistance (decrease)	In FY2012, 13 households were receiving TANF at program entry	Expected average of households receiving TANF: 10 Households	10	Yes

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
SS #5: Households Assisted by Services that Increase Self-Sufficiency				
Number of households receiving services aimed to increase self-sufficiency (increase)	0 families were receiving self-sufficiency services prior to implementation of the activity	HACSM expects 40 households to receive self-sufficiency services after implementation of the activity	53	Yes
SS #6: Reducing Per Unit Subsidy Costs for Participating Households				
Average amount of Section 8 and/or 9 subsidy (or local, non-traditional subsidy) per household affected by this policy in dollars (decrease)	In FY2012, 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: \$1,200	\$2,305	No ³
SS #8: Households Transitioned to Self-Sufficiency				
Number of households transitioned to self-sufficiency (increase)	0 households transitioned to self-sufficiency prior to implementation	Expected number of households transitioned to self-sufficiency: 10/year	34	Yes ⁴
<p>* Narrative of Challenges, if not Achieved and Potential New Strategy</p> <p>¹ <i>Unemployed</i>: (1) The unemployed number fluctuates from year to year because HACSM continues to admit new households to the program. For example, newly admitted households who are unemployed are also added to the total. HACSM expects the outcome will improve as these families gain employment during their terms of assistance. (2) The COVID pandemic has hugely affected job opportunities for the Housing Readiness participants.</p> <p>² <i>Households receiving TANF</i>: New households were added to the program. Some of these newly admitted households have TANF as part of their income.</p> <p>³ <i>Average amount of Section 8 subsidy per household</i>: In FY2022, the HACSM housing market continued to be one of the most challenging in the nation. Rental rate continued to climb annually. As a result, subsidy per household has also increased.</p> <p>⁴ <i>Expected number of households transitioned to self-sufficiency</i>: Majority of the HRP households are still within their initial FSS Contract of Participation. The 34 that graduated have successfully transitioned to self-sufficiency and exited the program.</p>				

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
Amended: FY2014

Description of the activity

Building upon the success of the original activity “Biennial Recertification Schedule for Elderly/Disabled Families,” in FY2014 HACSM expanded the regular recertification schedule to once every three years for Elderly/Disabled households. Interim changes will be conducted in accordance with the policies stated in the HACSM Administrative Plan.

Impact of the activity

HACSM continues to perform recertifications for all households that are designated as elderly and/or disabled triennially. However, HACSM will see the household and process interim adjustments in situations where the household income decreases or there is a change in the household composition. The triennial recertification has resulted in significant cost and staff time savings. Due to COVID restrictions, FY2022 recertifications were conducted by mail and virtual meetings.

Standard HUD Metrics

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
CE #1: Agency Cost Savings				
Total cost of task in dollars (decrease)	In FY2014, the cost of completing this task was \$154,085	HACSM expects that the cost for completing this task to not exceed \$118,645	\$62,767	Yes

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
CE #2: Staff Time Savings				
Total time to complete the task in staff hours (decrease)	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	1,094 hours	Yes
* Narrative of Challenges, if not Achieved and Potential New Strategy				

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
Amended: 7/1/2011

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 simple, easy to understand process for the participants and a streamlined, more efficient practice for HACSM. This activity also improves accuracy of the rent 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 income from assets would be included or calculated when determining the household's annual adjusted income.

If the household has total assets of \$50,000 or more, HACSM will include the *actual* interest earned in determining the household's annual adjusted income. Since implementation, the streamlined method for calculating assets has significantly simplified the rent calculation process without creating further burden for program participants as most participants have assets less than \$1,200.

Elimination of Earned Income Disallowance (EID)

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.

In FY2017, 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 FY2022, 3,233 households reported at least one asset account. Of these households, only 51 or 1.6% have assets over \$50,000. The average asset value per household is \$4,467. With this low average and interest rate, majority of the program participants did not earn any interest from their account.

Standard HUD Metrics

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
CE #1: Agency Cost Savings				
Total cost of task in dollars (decrease)	Cost of task prior to implementation: In FY2014, the cost of calculating the annual adjusted income for 3,102 households seen was \$59,774	\$59,774	\$125,701	Yes ¹
CE #2: Staff Time Savings				
Total time to complete the task in staff hours (decrease)	Total amount of staff time dedicated to the task prior to implementation. In FY2009, 1295 Hours	993 Hours	1,969 hours	Yes ²
CE #3: Decrease in Error Rate of Task Execution				
Average error rate in completing a task as a percentage (decrease)	0%	0%	0 (zero) files reviewed had errors related to the calculation of assets	Yes
CE #5: Increase in Agency Rental Revenue				
Total Household contributions towards	Household contributions prior to implementation of the activity (in	0	0	Yes ³

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
housing assistance (increase)	dollars). \$0			
<p>* Narrative of Challenges, if not Achieved and Potential New Strategy</p> <p>¹ The outcome includes increase in personnel costs and additional vouchers awarded to HACSM since FY2014</p> <p>² The outcome reflects increases in the number of vouchers administers by HACSM</p> <p>³ Due to the low dollar value of program participant's assets and overall low interest rate offered by financial institutions, this activity does not have significant impact on rental revenue</p>				

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

Amended:

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 childcare expenses, to relieve administrative burdens, increase productivity, and ease the intrusive nature of the process for HCV applicants and participants.

- 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.
- 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.
- Effective July 1, 2009 HACSM instituted a streamlined verification process to reduce the challenges in verifying claimed childcare expenses. Eligible families who claim childcare 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 childcare provider as proof of the claimed expense. Expenses incurred from an adult member of the household who provides childcare or the absent parent who does not reside in the subsidized unit, are not acceptable.
- 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.

Standard HUD Metrics

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
CE #1: Agency Cost Savings				
Total cost of task in dollars (decrease)	Cost of task prior to implementation In FY09, the total cost to complete this task was \$29,285	\$15,000 annually	\$6,895	Yes
CE #2: Staff Time Savings				
Total time to complete the task in staff hours (decrease)	Total amount of staff time dedicated to the task prior to implementation On average, HACSM staff spent 738 hours annually to process third-party verifications	HACSM expects an average of no more than 369 hours per year for staff to process third-party verifications	108	Yes
CE #3: Decrease in Error Rate of Task Execution				
Average error rate in completing a task as a percentage (decrease)	Average error rate of task prior to implementation: 10%	Expected average error rate of task after implementation: 10%	1%	Yes
* Narrative of Challenges, if not Achieved and Potential New Strategy				

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
Amended:

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 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 FY2022, 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 2022, 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 1, 2022, to reflect the current, extremely competitive rental market in San Mateo County.

In FY2022, 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.

Standard HUD Metrics

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
CE #1: Agency Cost Savings				
Total cost of task in dollars (decrease)	In FY2014, cost of task prior to implementation: \$81,000	Expected cost of task after implementation \$81,000	\$81,907	Yes ¹
CE #2: Staff Time Savings				
Total time to complete the task in staff hours (decrease)	In FY2014, this task required 1,550 staff hours	Expected staff time required to complete this task, 1,550 hours	1,283 hours	Yes
CE #3: Decrease in Error Rate of Task Execution				
Average error rate in completing a task as a percentage (decrease)	Average error rate of task prior to implementation: 10%	Expected average error rate of task after implementation: 10%	4.75%	Yes
CE #5: Increase in Agency Rental Revenue				
Total Household contributions towards housing assistance (increase)	In FY2014, the total household contribution was \$1,638,019	Expected rental revenue after implementation \$1,638,019	\$1,692,594	Yes
SS #1: Increase in Household Income				
Average earned income of households affected by this policy in dollars (increase)	In FY13 the average earned income per household was \$25,566	\$256 per year (a 1% increase)	\$28,761	Yes
SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)				

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving TANF assistance (decrease)	Number of families receiving TANF at program entry	Expected average of households receiving TANF after implementation 400	139	Yes
SS #8: Households Transitioned to Self-Sufficiency				
Number of households transitioned to self-sufficiency (increase)	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	190	Yes
<p>* Narrative of Challenges, if not Achieved and Potential New Strategy</p> <p>¹ The outcome reflects increases in the number of vouchers administered by HACSM and overall increase in personnel costs.</p>				

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 For HACSM-owned or affiliated properties

Approved by HUD: FYE2010

Implemented by HACSM: 7/1/2009

Amended:

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.

Standard HUD Metrics

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
CE #1: Agency Cost Savings				
Total cost of task in dollars (decrease)	In FY2009, 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	\$9,831	Yes
CE #2: Staff Time Savings				
Total time to complete the task in staff hours (decrease)	In FY2010, the total staff time per inspection: 60 hours	Expected amount of total staff time to complete the task: 112 hours	154 hours	Yes ¹

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
CE #3: Decrease in Error Rate of Task Execution				
Average error rate in completing a task as a percentage (decrease)	In FY2014, the average error rate was 28%	Average error rate in completing the task: 10%	0%	Yes
* Narrative of Challenges, if not Achieved and Potential New Strategy ¹ The number of hours reflects the increase in units that are HACSM-owned or affiliated				

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

Amended:

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 process 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.

Standard HUD Metrics

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
CE #1: Agency Cost Savings				
Total cost of task in dollars (decrease)	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	\$173,326	Yes ¹

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
CE #2: Staff Time Savings				
Total time to complete the task in staff hours (decrease)	On average, it required 4,157 hours annually to complete the annual HQS inspections prior to implementation	HACSM expects that will require 2,161 hours to complete HQS inspections on an annual basis	2,715 hours	Yes
CE #3: Decrease in Error Rate of Task Execution				
Average error rate in completing a task as a percentage (decrease)	HACSM is establishing this baseline with the FY2013. The error rate was 44%	Average error rate: 25%	0%	Yes
<p>* Narrative of Challenges, if not Achieved and Potential New Strategy</p> <p>¹ The outcome reflects increases in the number of vouchers administered by HACSM and overall personnel costs</p>				

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
Amended:

Description of the activity

Effective July 1, 2010 HACSM received HUD approval to increase the percentage of its' voucher budget authority to 30% for the Project-Based program. And, in 2017 and again in 2018, 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 40%. 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 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 FY2014, HACSM adopted policies to support the initial 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 five year time-limited program. If there is a need for additional housing assistance at the end of the term of participation, the family may apply for an extension according to HACSM hardship policy.

Impact of the activity

As of June 30, 2022, HACSM has established project-based contracts and commitments for approximately 36% of its HCV portfolio.

As discussed in Activity 2010-9: Tiered Subsidy Tables (TST), in FY2020, as part of its' on-going program monitoring, HACSM conducted a

review of the participant rent portions and the on-going HCV budget and concluded that using the traditional PBV rent calculation is more beneficial to the program participants. This transition was effective at the time of the annual contact rent increase.

Standard HUD Metrics

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
CE #1: Agency Cost Savings				
Total cost of task in dollars (decrease)	Cost of task prior to implementation: \$0	Expected cost of task after implementation \$0	\$0	Yes
CE #2: Staff Time Savings				
Total time to complete the task in staff hours (decrease)	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	0 hours	Yes
HC #4: Displacement Prevention				
Number of households at or below 80% AMI that would lose assistance or need to move (decrease). If units reach a specific type of household, give that type in this box.	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	0 households	Yes
* Narrative of Challenges, if not Achieved and Potential New Strategy				

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

Amended:

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 FY2022, HACSM maintained an average of 6,000 households on the HCV waiting list. HACSM did not select any applicants for eligibility determination during FY2022 due to its close to 95% utilization rate.

In FY2022, no household was denied due to owning property where they have the legal right to reside, and no household was denied eligibility due to exceeding the asset limits.

Standard HUD Metrics

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
HC #3: Decrease in Wait List Time				
Average applicant time on wait list in months (decrease)	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	6-12 months Applicants who were selected may renew or reapply anytime	Yes
* Narrative of Challenges, if not Achieved and Potential New Strategy				

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 Program

Approved by HUD: FYE2012
Implemented by HACSM: 11/15/2011
Amended:

Description of the activity

HACSM implemented a provider-based assistance program, outside the scope of the voucher program. The Provider-Based Assistance program) PBA 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 FY2022 the PBA program has continued to successfully reach households that would otherwise be very challenging to reach.

Standard HUD Metrics

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
HC #7: Households Assisted by Services that Increase Housing Choice				
Number of households receiving services aimed to increase housing choice (increase)	In FY2011, 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.	52 households	Yes
SS#1: Increase in Household Income				
Average earned income of households affected by this policy in dollars (increase)	Number of HOH employed was zero (0)	HACSM expects that 20 HOH will be employed after implementation	\$2,437	Yes
SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)				
Number of households receiving TANF assistance (decrease)	Zero (0) households receiving TANF prior to implementation	HACSM expects that 20 households will be receiving TANF after implementation	2	Yes
SS #8: Households Transitioned to Self-Sufficiency				
Number of households transitioned to self-sufficiency (increase)	Zero (0) households transitioned to self-sufficiency prior to implementation	HACSM expects that 5 households transitioned to Self-Sufficiency	14	Yes
* Narrative of Challenges, if not Achieved and Potential New Strategy				

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
Amended:

Description of the activity

In order for a family member, other than the head, co-head, or spouse to qualify for the full-time student (FTS) status, the family member must be less than 24 years old, attend an accredited institution full time, and provide a transcript from the institution to support the full-time student status. Once the FTS status is determined, the family member will be granted a dependent deduction and earned income exclusion.

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 FY2022, there were 173 households with Full Time Students between the ages of 18-24. On average, HACSM excluded \$9,685 of the students' annual earned income for these households.

In FY2022 there were 24 households with full time students over the age of 24, with an average annual earned income of approximately \$13,385 per household that was included in the gross income calculation.

HACSM did not receive any hardship requests as a result of this activity.

Standard HUD Metrics

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
CE #5: Increase in Agency Rental Revenue				
Total Household contributions towards housing assistance (increase)	FY11 the total household contribution prior to implementation was \$0	Expected rental revenue after implementation of the activity: \$453,738	\$1,451,703	Yes ¹
<p>* Narrative of Challenges, if not Achieved and Potential New Strategy</p> <p>¹This activity is primarily implemented for the HCV program where HACSM does not receive any income from the portion paid by the subsidized household.</p>				

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
Amended:

Description of the activity

HACSM includes foster care, KinGap, 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 FY2022, no household reported foster care, KinGap, or adoption assistance payments. HACSM did not receive any hardship requests as a result of this activity.

Standard HUD Metrics

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
CE #5: Increase in Agency Rental Revenue				
Total Household contributions towards housing assistance (increase)	The total household contributions prior to implementation of the activity was \$0	Expected rental revenue after implementation: \$96,000	\$0	Yes ¹
* Narrative of Challenges, if not Achieved and Potential New Strategy				
¹ This activity is primarily implemented for the HCV program where HACSM does not receive any income from the portion paid by the subsidized household.				

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
Amended:

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:

1. The individual becoming the new HOH must be in the household for at least the previous 12 consecutive months, and
2. 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 FY2022, 45 households in the MTW program requested a change in the HOH.

Standard HUD Metrics

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
HC #3: Decrease in Wait List Time				
Average applicant time on wait list in months (decrease)	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	6-12 months	Yes
* Narrative of Challenges, if not Achieved and Potential New Strategy				

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

Amended:

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

During FY2022, 8 households exited the program due to “zero HAP” status. HACSM continued to see an on-going trend that while some households were able to exit the program as a result of reaching an income level such that HACSM no longer paid any rental subsidy, others had experienced decrease in income during the 90-day period and remained in the program.

Standard HUD Metrics

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
HC #3: Decrease in Wait List Time				
Average applicant time on wait list in months (decrease)	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	6-12 months	Yes
* Narrative of Challenges, if not Achieved and Potential New Strategy				

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
Amended:

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. Since implementation of this activity, HACSM was able to leverage additional MTW funds to further increase the number affordable units being developed. Development activities included 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. Since the implementation of this activity, close to \$27,400,000 of the MTW funds have been awarded to 13 developments, which will provide 897 units of new, high-quality affordable housing for low, very low, and extremely low-income households. 578 of these units are already completed and leased, with another 319 either in construction or pre-development stage. The \$27,400,000 in MTW funding have leveraged approximately \$230 million in other sources of financing for these units. Additionally, the MTW funds were awarded to developers in the form of low-interest loans. As of June 30, 2022, \$3,138,254 has been paid back by the developers.

Standard HUD Metrics

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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, give that type in this box	Est. FY2011, 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	897 units	Yes
HC #2: Units of Housing Preserved				
Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase). If units reach a specific type of household, give that type in this box.	Housing units preserved prior to implementation (0)	Expected housing units preserved after implementation 60	140	Yes
CE #4: Increase in Resources Leveraged				
Amount of funds leveraged in dollars (increase)	\$0 leveraged prior to implementation	HACSM expects to leverage \$3 million dollars for every \$1 million dollars of MTW funds invested	\$230,000,000	Yes
* Narrative of Challenges, if not Achieved and Potential New Strategy				

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.

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: FYE2012
Implemented by HACSM: 11/15/2011
Amended:

Description of the activity

In conjunction with HUD regulations, HACSM defines childcare 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 when 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.

HACSM defines allowable childcare 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 childcare deduction is the lesser of the actual expense or 50% of the gross earnings or net profit from self-employment of the parent or guardian.

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. The amount deducted shall reflect reasonable charges for childcare.

A single parent who pays childcare to look for work or attend school full time will qualify for childcare expense deduction only if the expense is necessary and reasonable. The maximum allowable childcare deduction for a parent or guardian who has no earnings but seeks work or attends school full time will be the lesser of the actual expense paid or \$5000 per year per qualifying child, provided the deduction does not

exceed the parent's non-earned income.

Impact of the activity

HACSM has continued to find that this activity helps to clarify the process for childcare expenses resulting in some staff time savings and at the same time provided clarity and greater equity for all program participants. During FY2022, this activity resulted in approximately \$16,861 annual childcare expenses that were disregarded due to exceeding the policy limits. There were 73 households that claimed childcare expenses for deduction. The average amount per household that was deducted from the household's annual adjusted income was \$5,371.

There were no hardship requests received as a result of this activity in FY2022.

Standard HUD Metrics

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
CE #5: Increase in Rental Revenue				
Total Household contributions towards housing assistance (increase)	The total household contributions towards housing assistance in FY2013 was \$1,653,740	HACSM expected the total household contributions after implementation of the activity to remain constant at approximately \$1,650,000	\$564,696	Yes ¹
<p>* Narrative of Challenges, if not Achieved and Potential New Strategy</p> <p>¹ There has been a decrease in the number of households that claimed childcare expense during the reporting period.</p>				

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: 9/2/2014
Amended:

Description of the activity

In FY2015, HACSM implemented a standard pro-ration 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 FY2022, there were 119 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.

Standard HUD Metrics

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
CE #1: Agency Cost Savings				
Total cost of task in dollars (decrease)	In FY2014, the total cost to complete this task was \$8,674	HACSM expects that the cost to complete this task: \$12,000	\$6,959	Yes

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
		(Benchmark updated from \$4,400 to \$12,000, effective FY2016)		
CE #2: Staff Time Savings				
Total time to complete the task in staff hours (decrease)	In FY14, the total time to complete this task prior to implementation: 166 hours	Benchmark updated from 83 hours to 160 hours, effective FY16)	109	Yes
CE #3: Decrease in Error Rate of Task Execution				
Average error rate in completing a task as a percentage (decrease)	Average error rate in completing the task 0%	HACSM is establishing this benchmark with the submission of this report at: 5%	0%	Yes
CE #5: Increase in Rental Revenue				
Total Household contributions towards housing assistance (increase)	Total Household contributions in FY2013, 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	\$3,593,566	Yes
* Narrative of Challenges, if not Achieved and Potential New Strategy				

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

Amended:

Description of the activity

Current PBV regulations require the PHA provide applicants to an owner of PBV units from the PHA wait list. In general, this system is efficient and with on-going oversight and communication with PBV owners, HACSM has been able to provide a sufficient number of applicants for an owner to fill vacancies in a timely manner. The one area where this has been problematic has been in supportive service exception units. 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 extremely inefficient as opening and closing a waiting list for a preference causes confusion to the public and delays in serving the population who can most benefit from the services.

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 or the service providers that provide services for the exception units for eligibility determination. 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 FY2022, HACSM has used this MTW flexibility for PBV units with specific preferences, such as homeless and supportive service units where the program participants with special needs may benefit from the

services provided by the owner.

Standard HUD Metrics

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
HC #3: Average Applicant Time on Waitlist in Months				
Average applicant time on wait list in months	Average applicant time on wait list FY2015 was 48 months	1 month	1 month	Yes
* Narrative of Challenges, if not Achieved and Potential New Strategy				

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
Amended:

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.

Standard HUD Metrics

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
CE #1: Agency Cost Savings				
Total cost of task in dollars (decrease)	In FY2014, 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	\$2,087	Yes
CE #2: Staff Time Savings				
Total time to complete the task in staff hours (decrease)	In FY2014, it required 244 hours to complete this task	49 Hours	34 Hours	Yes
* Narrative of Challenges, if not Achieved and Potential New Strategy				

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

Amended:

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 FY2022. HACSM has continued to conduct biennial inspections with the Agency's staff or independent contractors.

Standard HUD Metrics

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved? ¹
CE #1: Agency Cost Savings				
Total cost of task in dollars (decrease)	In FY2014, 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 ¹	N/A ¹
CE #2: Staff Time Savings				
Total time to complete the task in staff hours (decrease)	In FY2014, it required 298 hours to complete this task	HACSM expects that after implementation it will require 119 hours to complete this task	N/A ¹	N/A ¹
<p>* Narrative of Challenges, if not Achieved and Potential New Strategy</p> <p>¹ HACSM has not actively used its authority to only inspect 20% of PBV units in a project in FY2020. All PBV units were inspected according to the voucher program biennial inspection schedule (activity #2011-15). Instead, HACSM has continued to conduct biennial inspections.</p>				

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
Amended:

Description of the activity

In FY2015, 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 FY2021, HACSM renegotiated its contract with Abode 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 more than 20 families through the course of the year. In FY2022, HACSM has spent approximately \$10,618 for Abode's housing search and counseling services in support of voucher 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 San Mateo County community, owners, 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 FY2022, 68 new landlords have joined the program, 284 landlords have received the "No Loss Bonus", and 19 Landlords have received a continuity bonus.

Standard HUD Metrics

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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, give that type in this box	In FY2014, Zero (0) new housing units	HACSM expects 10 new housing units each fiscal year	68	Yes
HC #3: Decrease in Waitlist Time				
Average applicant time on wait list in months (decrease)	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	2-3 months	Yes
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 (increase)	Zero (0) households	10 households	68 households	Yes
HC #7: Households Assisted by Services that Increase Housing Choice				
Number of households receiving services aimed to increase housing choice (increase)	Zero (0) households	Established in FY2016, HACSM expects that an additional 30 households will be served	117 households	Yes
* Narrative of Challenges, if not Achieved and Potential New Strategy				

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 #2018-36: Homeless Young Adults with Disability Program

Approved by HUD: FYE2018
Implemented by HACSM: 10/1/2018
Amended:

Description of the activity

In collaborative partnership with the Mental Health Association (MHA), HACSM is providing housing subsidy assistance for up to 20 Support and Advocacy for Young Adults in Transition (SAYAT)-eligible young adults to move from literal homelessness to stable housing and ultimately self-sufficiency.

Through this partnership, HACSM provides housing subsidy assistance to MHA directly referred SAYAT-eligible young adults who are eligible for the voucher program. The youth must be between the ages of 18-25, literally homeless, have an identified disability, and will benefit from the services provided by MHA. The eligible youth, referred to the program, would be the Head of Household and the household may ultimately include additional household members, such as dependent minors, or other adults.

Once referred by MHA, the youth meet with the HACSM case workers to conduct their program eligibility determination, based on HACSM's MTW program design and issued an MTW five-year, time-limited voucher. The SAYAT households are considered part of the HACSM MTW program and subject to all of the rules of the program, including how their subsidy amount is determined. As such, the youth will pay a portion of the contract rent directly to the landlord, based on their income and the HACSM TST activity (See Activity # 2010-9). HACSM administers the housing subsidy assistance.

Upon move in, the youth are invited to join the Self-Sufficiency Program, sign a Contract of Participation, establish goals and are eligible to receive the financial escrow bonus upon successful graduation from the program. During the five-year term of their participation, these youths also receive intensive case management and supportive services from the Mental Health Association on topics ranging from housing location, vocational training, education, employment, health services, and increased independence. MHA also provides support and appropriate interventions on an as-needed basis, as they have through their collaboration with HACSM via the Housing Readiness Program (MTW Activity 2009-2). A successful graduation would mean that the youth no longer requires government assistance (an FSS program

goal), has reached a zero HAP status, or their voucher has timed out and they are not returning to homelessness.

As in the case with the other MTW activities, HACSM has an existing hardship policy. The same hardship policy which can be found in Appendix Four will be offered to SAYAT participants. Additionally, MHA has a history of working with SAYAT youth, to find and secure affordable housing options outside of the voucher program, thus mitigating a potential return to homelessness for the referred individuals.

Impact of the activity

In FY2022, a total of 15 households received rental subsidy under the SAYAT Program. Of that total, 5 households have an active Contract of Participation and received self-sufficiency services.

Standard HUD Metrics

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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, give that type in this box	In FY2014, Zero (0) new housing units	HACSM expects 5 new housing units each fiscal year	15	Yes
HC #3: Decrease in Waitlist Time				
Average applicant time on wait list in months (decrease)	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	6 - 12 months	Yes
HC #5: Increase in Resident Mobility				

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase)	Zero (0) households	2 households	15 households	Yes
HC #7: Households Assisted by Services that Increase Housing Choice				
Number of households receiving services aimed to increase housing choice (increase)	Zero (0) households	HACSM expects 3 households will receive services aimed to increase housing choice	15 households	Yes
* Narrative of Challenges, if not Achieved and Potential New Strategy				

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.

B. Not Yet Implemented Activities

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

C. Activities on Hold

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

D. 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 #2000-4: Escrow Accounts

Approved by HUD: FYE 2010 Implemented by HACSM: 7/1/2009
Closed by HACSM: 7/1/2014

Rationale for Closing out the Activity

In FY2015, HACSM combined this activity with Activity #2000-1: MTW Five-Year Self-Sufficiency Program as the two activities are integrally linked.

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

Approved by HUD: FYE 2010 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:	FYE 2010	Implemented by HACSM:	1/27/2011
		Closed by HACSM:	6/30/2018

Rationale for Closing out the Activity

Since FY2014, 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:	FYE 2010	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:	FYE 2010	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:	FYE 2010	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 #2011-18: Eliminate 100% Excluded Income from the Income Calculation Process

Approved by HUD:	7/1/2011	Implemented by HACSM:	7/1/2011
		Closed by HACSM:	7/1/2015

Rationale for Closing out 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, income from minors, and foster care payments. Because this income is excluded from the income calculation process, it does not affect the amount of a family's rental assistance.

With the publication of PIH Notice 2013-4, issued January 28, 2013, the verification and calculation of 100% excluded income is no longer required. Because of this, HACSM has closed out this activity effective July 1, 2015.

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

Approved by HUD:	7/1/2011	Implemented by HACSM:	7/1/2011
		Closed by HACSM:	7/1/2017

Rationale for Closing out the Activity

Since this activity only applied to participants who had a HAP contract in place prior to July 1, 2010 and who did not relocate, this activity has seen minimal to no activity since 2015. Additionally, with the implementation of the TST, participants are responsible for their utilities and are encouraged to seek and secure units that are energy efficient and/or instances where the landlord pays for the utilities. With the TST activity, there are no utility allowances included in the tenants rent portion. Therefore, HACSM has ceased tracking the utility responsibilities and closed this activity through the FY2018 MTW Plan.

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

Approved by HUD:	FYE 2012	Implemented by HACSM:	7/1/2011
		Closed by HACSM:	7/1/2016

Rationale for Closing out the Activity

In FY2017, 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 #2013-28: Apply MTW Flexibilities to Public Housing

Approved by HUD:	FYE 2013	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 MTW activities that are not in conflict with RAD regulations.

Activity #2015-34: Local Collections Process

Approved by HUD:	FYE 2015	Implemented by HACSM:	9/2/2014
		Closed by HACSM:	6/30/2017

Rationale for Closing out the Activity

At the conclusion of FY2017, the MTW Office informed HACSM that this activity could not continue to be approved due to lack of MTW Authority.

SECTION V: MTW 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 has provided a thorough narrative of each activity that used only the Single Fund Flexibility in the body of the Report, including the metrics used to track the outcomes of these programs or activities.

B. LOCAL ASSET MANGEMENT PLAN

- i. Did the MTW PHA allocate costs within statute in the Plan Year? Yes
- ii. Did the MTW PHA implement a local asset management plan (LAMP) in the Plan Year? No
- iii. Did the MTW PHA provide a LAMP in the appendix? No
- iv. If the MTW PHA has provided a LAMP in the appendix, please provide a brief update on implementation of the LAMP. Please provide any actual changes (which must be detailed in an approved Annual MTW Plan/Plan amendment) or state that the MTW PHA did not make any changes in the Plan Year. Not applicable

SECTION VI: Administrative

A. Reviews, Audits and Inspections

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

FY2022 independent auditor's report is attached as Appendix B.

B. Evaluation Results

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

C. MTW Statutory Requirement Certification

Statutory requirement certification is attached as Appendix A.

D. MTW Energy Performance Contract (EPC) Flexibility Data

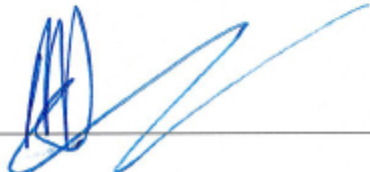
Not applicable

Appendix A – MTW Statutory Requirement Certification

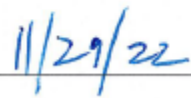
The Housing Authority of the County of San Mateo certifies that it has met the three statutory requirements of:

1. Ensuring 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 HACSM not participated in the MTW demonstration, and
3. Maintaining a comparable mix of households (by family size) served as would have been served had HACSM not participated in the MTW demonstration.

Housing Authority of the County of San Mateo (CA014)



Raymond Hodges
Executive Director



Date

Appendix B – FY2022 Independent Auditor Report

(Attached)