APPENDIX C

DAY 2 PRESENTATIONS & HANDOUTS
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## DAY TWO

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Executive Summary

The Moving to Work (MTW) demonstration was established to give public housing authorities (PHAs) and HUD flexibility to design and test various approaches for providing and administering housing assistance that:

1. Reduce cost and achieve greater cost effectiveness in Federal expenditures;
2. Give incentives to families with children where the head of household is working, seeking work, or is preparing for work by participating in job training, educational programs, or programs that assist people to obtain employment and become economically self-sufficient; and
3. Increase housing choices for low-income families.

The 33 current MTW agencies manage over 11% of all public housing units and near 13% of all vouchers. Combined, they receive roughly $2.7 billion in voucher funding, $730 million in public housing operating funds and $380 million in capital funds.

MTW was legislated in 1996, implemented in 1999 and is set to run until the end of each participating PHA’s 2018 fiscal year. Over ten years into the demonstration, it is an opportune time to assess lessons learned from the early years of the demonstration in order to shape the coming years.

The Consolidated Appropriations Act of 2010 specified that MTW provide an evaluation of the Moving to Work demonstration program. Each MTW agency implements a distinct set of activities with unique outcomes, making the effects of MTW difficult to generalize. HUD is currently working to procure a contractor to conduct an independent, third-party evaluation of MTW, but, prior to this evaluation, the individual experiences of MTW agencies can, in many cases, already inform housing policy. With this in mind, this interim report will address two questions:

1. How can MTW inform major policy debates, such as rent reform and streamlining housing assistance? and the examples and research provided are by no means considered exhaustive, this report identifies promising policies and practices, as well as concerns raised, based on the information available.

Preserving and Revitalizing Public Housing

Several MTW agencies have used MTW flexibilities to preserve public housing and replace decaying housing stock with modernized, mixed-income communities. These agencies have been able to improve the physical landscapes of their communities while providing more housing options for low-income families by:

- Pursuing greater capital development and portfolio goals with funding flexibility. MTW agencies have been able to pursue more ambitious development activities and engage in more strategic long-term capital planning as a result of MTW funding flexibility.

- Developing localized mobility policies to increase housing choice for recipients of rental assistance. The precipitating decertification statute for all traditional PHAs has proven difficult and expensive to administer. MTW PHAs have been able to adopt locally-informed resident choice and opportunity policies, which are streamlined to more effectively transform and revitalize their communities.

- Preserving public housing with project-based assistance. MTW agencies have leveraged considerable funds to preserve and maintain public housing by converting their public housing units to project-based assistance. Their experiences inform the Preservation, Enhancement, and Transformation of Rental Assistance Act (PETRA), which would support a streamlined conversion to longer-term project-based contracts similar to the project-based vouchers that MTW agencies use.

Though the flexibility afforded to MTW agencies allows them to respond quickly to portfolio needs and local market conditions, the relocation of residents and the stability of leveraged funding sources should be taken into consideration.

Streamlining Housing Assistance: Using MTW to Increase Cost-Effectiveness of Federal Expenditures

While conclusive impacts of many MTW activities, particularly as they relate to residents, cannot be known, some of the most compelling MTW results to date are those regarding housing authority operations. MTW housing authorities have been able to more efficiently allocate resources and engage in strategic long-term planning by:

- Allowing agencies to combine funds. MTW agencies do not receive an allocation of funds by virtue of participating in MTW; rather, they receive funds from the traditional three primary funding sources (Housing Choice Voucher, public housing capital and public housing operating funds) and are able to allocate the funds interchangeably for activities approved under MTW.

- Converting project-based contracts to longer-term project-based contracts similar to the project-based vouchers that MTW agencies use.

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protections to ensure that PHAs are serving as many or more families when they combine funds, before cautiously expanding this authority to other PHAs.

The primary concern regarding combined funds is whether housing authorities continue to serve the same number of families when they are permitted to use funds for purposes other than housing assistance. While there is a risk of relatively low utilization rates and high levels of reserves, most MTW agencies have actually served substantially more families than they would have been able to serve without MTW by streamlining operations and using accumulated funds to administer new assisted housing units.

- **Streamlining housing authority operations.** MTW agencies have utilized a host of administrative flexibilities to reduce unnecessary costs and labor for both residents and PHA staff. Many of these flexibilities have significantly reduced administrative burden and allowed participating agencies to more efficiently provide housing assistance. Some of the most promising streamlining flexibilities include:
  - **Simplifying Housing Quality Standard (HQS) inspection protocols.** Outside of MTW, all PHAs must be inspected prior to occupancy by tenants and before the anniversary of the occupancy date in each subsequent year. PHAs devote considerable resources to inspecting units that regularly adhere to HQS standards, and have no flexibility to cluster inspections efficiently. MTW offers agencies a number of flexibilities designed to streamline the HQS inspection process, including targeting higher-risk units with risk-based inspections, allowing lower-risk units to self-certify that units meet inspections and modifying inspection dates to allow for efficient groupings. These policies have resulted in considerable administrative and cost savings for agencies.
  - **Developing local wait list policies.** MTW agencies are permitted to merge wait lists between developments and programs, create special-purpose and additional site-based waiting lists, and develop localized tenant selection procedures. These flexibilities help agencies accommodate their wait lists to their portfolios and to more efficiently transition tenants off of waitlists and into unoccupied units.

These represent only two of many possible ways to streamline housing authority operations. Further exploration would likely reveal many ways in which more operations could be streamlined to reduce costs for the agency without negatively impacting residents. However, if streamlining flexibilities were to be expanded to other housing authorities, it would be important to explore the compatibility of these reforms with other programs so that housing authorities do not take on greater administrative burden to administer parallel systems with streamlined procedures for some families and traditional procedures for others.

**Rent Reform: Streamlining and Encouraging Self-Sufficiency through Alternative Rent Structures**

The experiences of MTW agencies have demonstrated that streamlining the rent calculation process may help alleviate administrative burden on housing authorities and residents without adversely impacting residents by:

- **Building stronger partnerships with other community organizations.** As a result of their funding flexibility and leveraging ability, MTW PHAs have an enhanced ability to collaborate with local community partners and capitalize on existing community resources to formulate more precise, tailored self-sufficiency programs that most effectively serve their local needs. MTW agencies can leverage their funding flexibility to supplement housing authority resources with community resources, ultimately providing more comprehensive services for residents.
- **Developing local self-sufficiency programs.** Although the current HUD self-sufficiency programs have shown signs of success, they are limited in funding and scope and provide a uniform approach to serving many distinct communities. MTW PHAs have developed ways to better incentivize self-sufficiency in residents by tailoring their self-sufficiency activities to their local community needs.
- **Providing service-enriched housing.** MTW agencies have used their project-based assistance flexibilities in partnership with local community organizations to provide service-enriched housing for low-income or other high-risk individuals and families. These populations often require extensive services in conjunction with housing assistance, but neither housing authorities nor community organizations are well positioned to provide both of these on their own.

While pairing housing assistance with supportive services may help housing authorities serve more family types (e.g., homeless and special needs families) and reduce the need for public assistance by helping residents become self-sufficient, it is important to recognize trade-offs between providing services and providing housing assistance. Without additional funding sources, the funds directed towards the provision of services may in some cases require a PHA to house fewer families. If the ability to develop locally tailored self-sufficiency programs is extended to all PHAs, it is important to consider how to ensure that the same number of families is housed. The ability of PHAs to partner with community organizations is especially important in this consideration, as leveraging community funds can allow PHAs to provide more services to residents while still maintaining the same level of rental subsidies.

**Selecting for Success in MTW**

While definitive outcomes of specific MTW reforms are still unclear, there is abundant qualitative data regarding the implementation of MTW programs. This report analyzes the data to determine what criteria of service delivery outcomes PHAs should use to determine the impacts of their programs on tenants. For example, by selecting agencies committed to testing a particular rent reform or other innovation in combination with a rigorous evaluation, the addition of new agencies can help HUD learn about specific areas of interest as they arise. Moreover, by requiring improved data collection methods and evaluation strategies from the outset, incoming MTW agencies will be better positioned to significantly strengthen the existing body of data on MTW.
MTW was designed as a demonstration program and a response to the ongoing need for a sustainable public housing platform. While MTW can continue to inform the housing industry about the outcomes of various approaches, a more extensive overhaul of the public housing laws would allow all public housing authorities to experience the benefits available to MTW agencies.
Breakout Discussion: Preserving and Revitalizing Public Housing

Michael P. Kelly  
Executive Director  
Philadelphia Housing Authority

Luci Blackburn  
HOPE VI Team Leader/MTW Coordinator  
United States Department of Housing and Urban Development

In August 2010, HUD published a report to Congress, Moving to Work: Interim Policy Applications and the Future of the Demonstration. The topical areas of our breakout sessions mirror the topical areas in HUD’s report. This discussion will focus on Preserving and Revitalizing Public Housing.

Preserving and Revitalizing Public Housing

Over the past 15 years, 150,000 public housing units have been demolished and disposed of because of poor quality. PHAs receive funds to modernize and preserve current stock in levels inadequate to undertake extensive modernization.

The MTW demonstration was born out of the need to adopt local, market-based strategies for providing assistance and the nature of public housing stock has changed in light of these urban revitalization policies.

Preserving and Revitalizing Public Housing

The goal is to discuss our efforts, as MTW agencies, to preserve and revitalize public housing and how these experiences can inform future legislative proposals.

In addition to the case studies and examples in HUD’s report, here are some examples of how the MTW designation has allowed the Philadelphia Housing Authority to replace its aging public housing stock with new, mixed-income communities.

Martin Luther King - 1999

- Multi-bedroom townhouse units
- Off street parking
- 245 Units
- 109 Homeownership
- 136 Rental
- LIHTC & HOPE VI fund over half the cost of the entire development
- City Capital funds also part of mix

Martin Luther King - Today
Richard Allen - 2000

- Renewal began in 1996
- Completed in 2003
- 408 new homes
- Includes a 5-story, 80-unit complex for seniors
- Site once held over 1,300 units
- $91.2 million investment
- Funding includes HOPE VI, Public Housing Capital Funds, City Capital funds, private equity & private activity bonds

Richard Allen – Today

Greater Greys Ferry Estates - 2002

- General purpose government bonds
- Private activity tax exempt bonds
- LIHTC generated by private activity bonds
- Strategy generated a total of $195 million

Greater Greys Ferry Estates - Today

Mantua Hall - 2007

- Phase I - 50 units
  - TDC $17.8M
  - Equity $9.5M
- Phase II - 51 units
  - TDC $17.4M
  - Equity $5.4M

Mantua - Today
Preserving and Revitalizing Public Housing

A. Using MTW flexibility, what policy changes have your agencies made that has enabled it to:
   • Pursue greater capital development and portfolio goals
   • Develop localized mobility policies to increase housing choice
   • Preserve public housing with project-based assistance

B. Have the changes been successful in meeting one or more of the MTW statutory objectives?
   • If yes, how can you document/prove this?
   • If no, why? And, what was learned from the experience?

C. As a result of what we’ve learned, what changes can we recommend to the Secretary, Congress, and the industry for expansion to all PHAs?

D. What policies do we think still need more research/testing before an assessment can be made?

E. What statutory, regulatory, and/or policy modifications would be needed to effectuate the recommended changes?

Time permitting
Data Collection, Evaluating MTW Activities, and Developing Baselines and Benchmarks

Presenters:
LaRae Baumann, Project Analyst
Tomico Evans, Family Support Manager/Interim Client Services Director

Presentation Outline
I. Introduction
II. Program Inception, Implementation, and Evaluation
   a. Developing Benchmarks
   b. Developing Baselines
   c. Data Collection and Evaluating Activities
   d. Continuous Improvement Processes
III. Comments & Questions

Why Are Setting Benchmarks, Baselines, Gathering Data, and Evaluating Activities Significant?
- Develop New Programs
- Evaluate Effectiveness
- Monitor Progress

Why Are Benchmarks Important?
- Benchmarks are goals!
- Benchmarks are targets!
- They help to confidently measure and report on both progress and effectiveness of your programming!

Initial Measures
1. Successful Move-outs
   - Increased Incomes
   - Improved Credit
   - Stable Employment
   - Improved Knowledge of Community Resources

2. Obtain Employment
   - Employment Barriers ID’d
   - Skills/Training Obtained
   - Employment Obtained

3. Youth Academic Development
   - Maintain Moving Forward Standards
   - Maintain Equality
   - Create Environments Conducive to Change
   - Increase CHA Success within Community

4. Community Development
   - Improved Graduation Rates
   - On Grade Level Performance
   - Decreased Truancy
   - Increased Post-Graduate Activity
   - Improved CHASF Participation

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Developing Baselines

- Setting the baseline for each measure is really important because it sets the point at which you started.
- Without a baseline you cannot accurately judge the effectiveness of the measure.

<table>
<thead>
<tr>
<th>Measure</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Year 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Decrease minimum renters</td>
<td>10%</td>
<td>50%</td>
<td>75%</td>
<td>75%</td>
<td>75%</td>
</tr>
<tr>
<td>Increase working households</td>
<td>10%</td>
<td>30%</td>
<td>50%</td>
<td>60%</td>
<td>60%</td>
</tr>
<tr>
<td>Number of customers employed 15+ hrs/week (PT)</td>
<td>50%</td>
<td>75%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td>Number of customers employed 30+ hrs/week (FT)</td>
<td>50%</td>
<td>75%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td>Increase positive graduation move outs</td>
<td>50%</td>
<td>50%</td>
<td>50%</td>
<td>50%</td>
<td>50%</td>
</tr>
</tbody>
</table>

**Annual Performance Goals Baseline**

<table>
<thead>
<tr>
<th>Measure</th>
<th>YTD Milestone</th>
<th>YTD Actual</th>
<th>YTD % of Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of increased working households annually</td>
<td>36</td>
<td>1/qtr</td>
<td>54</td>
</tr>
<tr>
<td>Number of customers employed 15+ hrs/week (PT)</td>
<td>13</td>
<td>3/qtr</td>
<td>38</td>
</tr>
<tr>
<td>Number of customers employed 30+ hrs/week (FT)</td>
<td>23</td>
<td>5/qtr</td>
<td>16</td>
</tr>
<tr>
<td>Percent of increased earned wages at sites</td>
<td>0% ($14664.00)</td>
<td>$92/qtr</td>
<td>$19,503</td>
</tr>
<tr>
<td>Percent of Tier 3 families who move into non-assisted housing</td>
<td>0% (5)</td>
<td>1/qtr</td>
<td>0</td>
</tr>
<tr>
<td>Percent of CHA HS Seniors graduating with a HS diploma annually</td>
<td>CMS data pending</td>
<td>CMS data pending</td>
<td>CMS data pending</td>
</tr>
<tr>
<td>Percent of HS graduates entering post secondary education annually</td>
<td>CMS data pending</td>
<td>CMS data pending</td>
<td>CMS data pending</td>
</tr>
<tr>
<td>Percent of CHA students complying with CMS attendance policies annually</td>
<td>CMS data pending</td>
<td>CMS data pending</td>
<td>CMS data pending</td>
</tr>
<tr>
<td>Percent of families participating in positive community activities (workshops, volunteering, training, community watch programs)</td>
<td>29% (23)</td>
<td>9/qtr</td>
<td>30</td>
</tr>
</tbody>
</table>

**Initial Data Collection Format**

<table>
<thead>
<tr>
<th>Measure</th>
<th>Initial Data Collection Format</th>
<th>Used January 2009 - September 2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Decrease minimum renters annually</td>
<td>5%</td>
<td>10%</td>
</tr>
<tr>
<td>Increase working households annually</td>
<td>5%</td>
<td>10%</td>
</tr>
<tr>
<td>12+ Mos Job retention rate</td>
<td>10%</td>
<td>40%</td>
</tr>
<tr>
<td>Income progression - Aggregate by site</td>
<td>20%</td>
<td>27%</td>
</tr>
<tr>
<td>Increase positive graduation move outs by site</td>
<td>12%</td>
<td>15%</td>
</tr>
<tr>
<td>Number participating in positive community activities (workshops)</td>
<td>60%</td>
<td>65%</td>
</tr>
</tbody>
</table>

**Program Metrics – Youth**

<table>
<thead>
<tr>
<th>Measure</th>
<th>SY* 11-12</th>
<th>SY* 12-13</th>
<th>SY* 13-14</th>
<th>SY* 14-15</th>
<th>SY* 15-16</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percent of CHA students enrolled in CIS will be promoted to next grade level</td>
<td>80%</td>
<td>81%</td>
<td>82%</td>
<td>83%</td>
<td>84%</td>
</tr>
<tr>
<td>Percent of CHA students enrolled in CIS will have an average daily attendance of 90% or above</td>
<td>80%</td>
<td>81%</td>
<td>82%</td>
<td>83%</td>
<td>84%</td>
</tr>
<tr>
<td>Percent of CHA students enrolled in CIS will graduate with HS diploma by site</td>
<td>85%</td>
<td>85%</td>
<td>85%</td>
<td>85%</td>
<td>85%</td>
</tr>
<tr>
<td>Percent of CHA students enrolled in CIS will apply for the CHASF by the deadline</td>
<td>90%</td>
<td>91%</td>
<td>92%</td>
<td>93%</td>
<td>94%</td>
</tr>
<tr>
<td>Percent of CHA HS graduates enrolled in CIS who apply to post secondary education (college, university, military)</td>
<td>80%</td>
<td>82%</td>
<td>84%</td>
<td>86%</td>
<td>88%</td>
</tr>
</tbody>
</table>

**Master Tracking System Overview**

1. Collect EOM’s on the 5th of each month
2. Corrections made and submitted to Project Analyst by 10th of each month
3. Active and Closed Data is copied into MTS workbooks
   a. copied data entered on the active and closed tabs are linked to fields with formulas on output tabs
   b. raw data is automatically generated by cohort, tier, and measure – as well as counts to assist in generating reports.
### Vendor Performance Snapshot - Detail Report

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Program/Site</th>
<th>Cohort</th>
<th>Program Year</th>
<th>Tier Levels at Site</th>
<th>Number in Tier/Cohort</th>
<th>Baseline</th>
<th>YTD Actual</th>
<th>Aggregate Goal</th>
<th>% of Goal Attained</th>
<th>Indicator Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency A</td>
<td>Moving Forward/FSS</td>
<td>Pilot Group A</td>
<td>2020</td>
<td>Tier 1, Tier 2</td>
<td>3 2</td>
<td>10</td>
<td>7</td>
<td>2</td>
<td>90%</td>
<td>10</td>
</tr>
<tr>
<td>Enrolled: 29</td>
<td></td>
<td></td>
<td>15</td>
<td>Tier 3</td>
<td>5</td>
<td>12 8</td>
<td>8 8</td>
<td>8</td>
<td>100%</td>
<td>10</td>
</tr>
<tr>
<td>Total Population: 29</td>
<td></td>
<td></td>
<td>15</td>
<td>Tier 4</td>
<td>5</td>
<td>12 8</td>
<td>8 8</td>
<td>8</td>
<td>100%</td>
<td>10</td>
</tr>
</tbody>
</table>

- **Cohort** indicates the enrollment year and tells us how long they have been in the program.
- **Tier Level** indicates the level of need for each family – Scale of 1 to 4.

### Continuous Improvement Processes

- Services to be provided within the framework of a **System of Care**.
- Individual **Family Support Teams** assembled to work with families to ensure needs are met.
- Coordination of services be consistent with the **Wraparound Approach to Planning**.
- **Highly Collaborative**

### Questions or Comments?
Performance Based Reporting and Tracking Terminology

Aggregate – Combined total of site – not individual. Used in relation to performance goals and metrics to determine the performance of a cohort-tier group, and overall site performance.

Baseline – Initial data documented at the start the project or after tracking methods change as projects evolve. Used for comparison and to measure progress towards goal.

Benchmark – Target or standard of what you want to accomplish over set time period to determine success – Ours are set annually.

Cohort- Identifies the number of years a family has participated in supportive service programming. The enrollment or cohort year is adjusted at the start of each fiscal year (April-March schedule).

Goal- “...the end toward which effort is directed”, 2011, Merriam-Webster....Also referred to as benchmark or target.

Metric – A standard of measurement – We use percent and depending on the measure – look for an increase or decrease over the baseline. Although annual, we monitor performance on a monthly, quarterly, bi-annual and annual basis.

Outcome- results of metric – performance based measure, able to show performance and/or achievement. It may be associated with the process, or the output....quantification of performance.

Output – A count of number of occurrences – Processes deliver outputs so what pops out at the end of a process is an output – these can be seen, felt, or moved about....also called deliverables.

Tier – Identifies the resident’s level of needs, given a numerical score of 1 to 4. 1 being having the most needs, 3 having the least level of need, and 4 which indicates senior or disabled household.
Q: Where do you get the numbers shown in the Tier-Cohort Column?
A: We take the number off the most recent EOM of the report period in review by sorting by Cohort and then sort this listing by the Tier – separating out the 1, 2, 3 and 4’s.

Q: How do you calculate the baseline?
A: During the 3rd quarter of FY10-11, CHA worked with UNC-CH to develop a tracking system which
   a) Streamlined all reporting and programming
   b) Accounted for program attrition
   c) Tracked progressions (Cohort/Enrollment Year – start of each new FY)
   d) Accounted for each family’s unique levels of needs (Tier)

This was implemented through the development of our Master Tracking System – which includes the use of the most current EOM template, and new metrics by all contract vendors and in-house staff. As a result of the changes, baselines were reset to account for the changes made to our data collection process. The baselines reported in the Board of Commissioners CRC Bi-annual Update report resets the baseline data from the data reported during the 4th quarter of FY10-11 for all of our supportive services programming. This is why when reviewing the Oct ‘10 – Mar ‘11 baseline, they match the YTD actual columns. The baseline was the YTD actual performance.

Q: I see a lot of columns and numbers on the performance detail – what am I looking at?
A: The performance detail was a report designed to give in-house program supervisors and contract managers a detailed look at their staff and vendors performance for that report period.

For each measure listed at the top (Increase Working Households, Job Retention, etc) there are five (5) columns below, which include: a column for baseline, YTD actual, the aggregate goal, the % of goal attained and a column for the indicator point value. So for each measure we look at these 5 items to determine performance.

Q: How do you calculate the aggregate goal?
A: We first look to the Tier and then the Cohort column – this tells us what metric to use from the program metric table. Once this is determined we multiply the baseline by the metric – this then provides us with a number. This number is then added back into the baseline to give us our annual goal/target/benchmark.

For example: Baseline for increase working households for those who are 2-2 is 13 residents. Referring to the program metric table, find the measure, find the cohort (2), and find the tier (2). This tells us that the metric is 10%. I now take the 13 (10%/10)=1.3...this equals 1 (we always round down to account for real people to prevent exceeding the total population) 13+1 =14. This is the Aggregate goal.
Q: How do you determine the percent of goal attained?
A: Because the measures are based on site performance they are aggregate – so we have to add or sum up the YTD actual columns and the aggregate goal columns for each measure. We then divide the two to give us our percent of goal attained – this then results in a percentage which is given a color and point value.

90-100% = green, 4 pts
80-89% = yellow, 3 pts
70-79% = orange, 2 pts – Great Concern
60-69% = red, 1 pt – Exceptional Concern

All contracts which have been in effect since April 2011 are streamlined to match the performance metrics and indicators. Any new contract or extensions will include said metrics and indicators.
HACSM’s Research Strategies for the MTW Program

- Linking all MTW activities to the MTW Program goals
  - Administrative efficiencies and cost savings
  - Increasing housing choice
  - Increasing participant self-sufficiency

- Designed the MTW activity and research simultaneously (as much as possible)

- Designed the MTW activities to show that there could be “another way” or “better way”

- Designed research to provide proof of the validity of our claim/theory (or provide the basis of discussion if the results did not meet expectations)

*When determining the expected purpose/outcome of the activity:*

<table>
<thead>
<tr>
<th>Questions we asked ourselves:</th>
<th>Methods of measuring:</th>
</tr>
</thead>
<tbody>
<tr>
<td>How to assess administrative costs?</td>
<td>• Monitoring staff costs</td>
</tr>
<tr>
<td></td>
<td>• Monitoring operational costs</td>
</tr>
<tr>
<td>How to assess processing time?</td>
<td>• Job function study (staff time study)</td>
</tr>
<tr>
<td></td>
<td>• Process study</td>
</tr>
<tr>
<td>How to assess improved performance or accuracy on staff level or agency level?</td>
<td>• Quality Assurance results</td>
</tr>
<tr>
<td></td>
<td>• Budget monitoring</td>
</tr>
<tr>
<td>How to access tenant progress?</td>
<td>• Increase in employment income (or reduction in government assistance) by tenant</td>
</tr>
<tr>
<td></td>
<td>• Increase in savings</td>
</tr>
<tr>
<td></td>
<td>• Participation/Completion of training programs</td>
</tr>
<tr>
<td>Increase in affordable housing choices?</td>
<td>• New building</td>
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<td></td>
<td>• Rehab projects</td>
</tr>
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<td></td>
<td>• Migration of participants within County</td>
</tr>
</tbody>
</table>
HACSM Research examples:

1. Biennial Inspections

<table>
<thead>
<tr>
<th>Baseline (established FY10)</th>
<th>Benchmark</th>
<th>Metric</th>
</tr>
</thead>
<tbody>
<tr>
<td>HACSM has 4023 vouchers that require annual inspections under the current system.</td>
<td>Reduce the number of annual inspections by 1800</td>
<td>Compare number of annual inspections before and after the new initiative</td>
</tr>
<tr>
<td>On average, it takes 62 minutes (249,426 minutes or 4,157 hours annually) in total to complete each annual inspection, including travel time.</td>
<td>Save 1,860 hours of staff time annually</td>
<td>Conduct time study to ensure sufficient time is spent to produce quality inspections</td>
</tr>
<tr>
<td>On average, HACSM has $6.57 in direct material costs per inspection or $26,431.11 annually.</td>
<td>Save $11,826 in direct costs</td>
<td>Compare direct costs before and after the new initiative</td>
</tr>
</tbody>
</table>

Owner outreach/education. Situated in one of the costliest rental markets, HACSM recognizes the need to expand its effort in owner outreach and education in order to assist program participants in locating suitable units in the county. Due to the high number of cases per housing specialist, currently, almost all of the staff time is devoted to conducting inspections (annuals, interims, and move-ins), leaving very little time to implement a comprehensive owner outreach and education program.

HACSM expects to implement an owner outreach and education program that includes:
1. Semi-annual owner information workshops,
2. 6 field visits to owners (new and existing) per month,
3. Entering at least 16 new comparables per month in the HACSM rent reasonableness data base

2. Biennial Recertification for Disabled/Elderly Households

<table>
<thead>
<tr>
<th>Baseline (established FY09)</th>
<th>Benchmark</th>
<th>Metric</th>
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</thead>
<tbody>
<tr>
<td>Of 4023 reexamination appointments processed annually, approximately 48% of the households qualify as Elderly/Disabled households.</td>
<td>HACSM expects to see a 24% reduction in the total number of annual reexaminations. In FY10, HACSM expects to recertify approximately 965 fewer households.</td>
<td>Comparison of the amount of time spent to process annual reexaminations before and after new program implementation.</td>
</tr>
<tr>
<td>On average, HACSM staff spend 84 minutes per file to complete reexamination appointments and applicable paperwork. Each HACSM staff member responsible for reexaminations spends 513 hours on annual reexamination processes.</td>
<td>HACSM expects to save 122 hours (965 households at 84 minutes per file) per staff member annually.</td>
<td>Comparison of the amount of time spent to process annual reexaminations before and after new program implementation.</td>
</tr>
<tr>
<td>Direct costs associated with processing annual reexaminations, on average, are $322,014.00</td>
<td>HACSM expects an $80,504 cost savings as a result of this initiative.</td>
<td>Comparison of direct costs before and after implementation.</td>
</tr>
</tbody>
</table>
Time Study/Cost Study

- Gather as much data as you can from the start
  - **Biennial Inspection Activity information gathered**
    - Inspector
      - Participant Information
      - City
      - Unit Type
      - Bedroom size
      - Inspection Date
      - 2nd Inspection Date, if rescheduled
      - # of Rechecks
      - Time required to complete the inspection (Time In : Time Out)
      - Time required to complete the re-inspection (Time In : Time Out)
      - Time required to complete 2nd re-inspection (Time In : Time Out)
      - Number of “No shows”
      - Travel Time
      - Mileage
      - # of Phone calls
  - **Biennial Recertification Activity information gathered**
    - Housing Occupancy Specialist
      - Participant Info
      - Appointment Date
      - 2nd Appointment Date, if rescheduled
      - “No show?”
      - Time to complete interview (Time In : Time Out)
      - Verifications required (Y:N)
      - Income Verification
      - Medical Expense Verification (# needed)
      - Disability Assistance Expense Verification (# needed)
      - Child Care Expense Verification (# needed)
      - Asset Verification (# needed)
      - Time to complete Annual Income Calculation
      - Date file sent to Office Assistant
      - # of Phone Calls
    - Office Specialist
      - Housing Occupancy Specialist
      - Income Verifications Sent (per file)
      - Med Expense Verification Sent (# per file)
      - Disability Assistance Expense Verifications Sent (# per file)
      - Child Care Expense Verifications Sent (# per file)
      - Asset Verifications Sent (# per file)
      - Time to complete verifications (per file)
      - # of Phone Calls
      - Data entry Action type
      - Time to complete data entry
      - Time to complete NOC
      - Date received from HOS for processing
      - Date file returned to file room

- Make it as easy as possible for your staff to complete (auto fill as much as possible)
- The time study is for a limited period of time (1 month, 2 weeks, etc.)
- All staff are represented (not just the high performers, or the methodical)
- Make sure it is at a “normal” time in the year – not during the holidays or high vacation periods
- Make sure it is a random (and representative) sample
• Using the data collected, you can then extrapolate out to the entire program

Challenges and Lessons Learned:

• Interpreting and reporting on the results
• Measuring the forest or the trees? (Activity overlap)
• Old vs. New Activities
• Data monitoring
• Use the tools that you already have in place
  o Information from your housing program database (Yardi, Emphasys, Tenmast, etc)
  o Information already collected via Quality Assurance Departments
  o Tracking logs: RTA, Waiting List, Voucher utilization, etc.

<table>
<thead>
<tr>
<th>Analysis of costs to complete Recertification</th>
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<td><img src="" alt="Table" /></td>
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For additional information, contact:

Jennifer Rainwater, MTW Project Manager
(650) 802-3358
jrainwater@smchousing.org
Non-elderly Disabled (NED) Vouchers

What are NED vouchers?
- Special purpose vouchers awarded to PHAs to serve non-elderly disabled families, including:
  - One-year Mainstream vouchers
  - Designated Housing/Certain Development vouchers
  - Project Access vouchers
  - FY 2009 NED Category 1 and Category 2 vouchers

NED Category 2 Vouchers:
- Special NED vouchers that enable NED families currently residing in nursing homes or other healthcare institutions to transition to the community.
  - Awards were announced on Jan. 6, 2011, effective Feb. 1
  - 948 vouchers awarded to 28 PHAs in 15 states
  - PHAs identified a partnering resource agency to provide referrals and supportive services

Who is eligible for a NED voucher?
- Families whose head, spouse or sole member is:
  1. Non-elderly: between the ages of 18-61 (when HAP contract is effective); and
  2. A person with a disability: as defined under 24 CFR § 5.403
- Families with only a minor child with a disability are not eligible.

Who is eligible for a NED Category 2 voucher?
- Non-elderly disabled families who are:
  1. Transitioning from a nursing home or other health care institution, AND
  2. Will be provided the services needed to live independently in the community.

What are the rules/requirements?

Issuing NED Vouchers
- NED vouchers may only be issued to eligible non-elderly disabled families from the PHA’s HCV waiting list.
- The PHA does not need to establish a preference in order to serve these families ahead of other families on the PHA’s waiting list.

Reporting
- The PHA must report NED vouchers into PIC with the code NED entered on line 2n of the Family Report (50058).
- Category 2 vouchers must be reported as NHT (Nursing Home Transition)
- The PHA must record NED vouchers in the Voucher Management System (VMS) in the NED column.

Rules/Requirements Cont.

Turnover
- Upon turnover, NED vouchers must be re-issued to non-elderly disabled families on the PHA’s waiting list.
- Category 2 turnover:
  - Category 2 turnover vouchers must be re-issued to eligible Category 2 families to the extent possible
  - If there is no Category 2 family on the waiting list or ready for immediate referral to the waiting list, the voucher must be issued to the next non-elderly disabled family on the waiting list.
  - If this happens, the PHA should reach out to the partnering agency so that the next non-elderly disabled voucher that turns over can be issued to a Category 2 family.
  - PHAs must always maintain their baseline number of NED vouchers

Notice PIH 2011-32 (NED Notice)
- The Frank Melville Supportive Housing Investment Act of 2010:
  - Upon turnover, all vouchers for NED families received pursuant to appropriation Acts for fiscal years 1997 through 2002, or any other subsequent appropriations, must remain with NED families to the maximum extent possible.
  - PIH 2011-32 was issued on June 12, 2011
  - Requires PHAs to serve the number of NED families for which it received awards since 1997
  - Provides instructions to PHAs on reestablishing and reporting these vouchers
  - Approximately 55,000 vouchers for NED families have been awarded to PHAs since 1997
### NED Voucher Awards since 1997

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<tr>
<td>Project Access</td>
<td>420</td>
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<tr>
<td>Mainstream One-Year</td>
<td>9,758</td>
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<td></td>
<td>9,758</td>
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<td>Certain Developments and Designated Housing</td>
<td>17,147</td>
<td>2,497</td>
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<td>19,644</td>
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<tr>
<td>NED Category 1</td>
<td>4,321</td>
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<td>4,321</td>
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<tr>
<td>NED Category 2</td>
<td>948</td>
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<td>948</td>
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<tr>
<td><strong>TOTAL</strong></td>
<td><strong>47,125</strong></td>
<td><strong>2,497</strong></td>
<td><strong>4,321</strong></td>
<td><strong>948</strong></td>
<td><strong>55,091</strong></td>
</tr>
</tbody>
</table>
Family Unification Program (FUP) Fact Sheet

What are family unification vouchers?
Family unification vouchers are made available to families for whom the lack of adequate housing is a primary factor in the separation, or threat of imminent separation, of children from their families or in the prevention of reunifying the children with their families. Family unification vouchers enable these families to lease or purchase decent, safe and sanitary housing that is affordable in the private housing market.

How can families obtain family unification vouchers?
Interested families should contact their local PHA.

What organizations are eligible to apply for family unification program vouchers?
PHAs authorized under state law to develop or operate housing assistance programs may apply.

How do PHAs apply for voucher funding from HUD?
Public Housing Agencies (PHAs) respond to notices of funding availability (NOFAs). Each NOFA identifies allocation areas, amount of funds available per area and the selection criteria for rating and ranking applications.

What families are eligible to apply for the family unification program vouchers?
Families are eligible for these vouchers if they meet two conditions:

- The public child welfare agency (PCWA) has certified that this is a family for whom the lack of adequate housing is a primary factor in the imminent placement of the family's child, or children, in out-of-home care, or in the delay of discharge of a child, or children, to the family from out-of-home care; and
- The PHA has determined the family is eligible for a housing choice voucher.

How does a PHA determine if a family is income eligible for the family unification program vouchers?
The PHA compares the family’s annual income (gross income) with the HUD-established very low-income limit or low income limit for the area. The family's gross income cannot exceed this limit.

How do families obtain an apartment once they have a voucher?
It is the responsibility of a family to find a unit that meets their needs. If the family finds a unit that meets the housing quality standards, the rent is reasonable, and the unit meets other program requirements, the PHA executes a HAP contract with the property owner. This contract authorizes the PHA to make subsidy payments on behalf of the
family. If the family moves out of the unit, the contract with the owner ends and the family can move with continued assistance to another unit.

**How much rent do vouchers cover?**
The PHA pays the owner the difference between 30 percent of family income and PHA determined payment standard or gross rent whichever is lower. The family may choose a unit with a higher rent than the payment standard and pay the owner the difference.

**Do families have to lease a unit in the jurisdiction where the PHA issues the voucher?**
No. A family may choose a unit anywhere in the United States where there is a PHA that administers a tenant based voucher program. However, the family may only use the voucher to lease a unit in an area where the family is income eligible at admission to the program.

**What regulations cover this voucher?**
Regulations are found in 24 CFR Part 982.
MTW and Special Purpose Vouchers Q&A

What are Special Purpose Vouchers?

- Special Purpose Vouchers are specifically provided for by Congress in line item appropriations which distinguish them from regular vouchers.
- Examples of Special Purpose Vouchers are:
  - Veteran Affairs Supportive Housing (VASH)
  - Family Unification Program (FUP)
  - Non-Elderly Disabled (NED)
  - Enhanced Vouchers
  - Tenant Protection Vouchers (TPV)

**HUD-VASH Vouchers**

What is the purpose of HUD-VASH Vouchers?

- The HUD–VASH program combines HUD HCV rental assistance for homeless veterans with case management and clinical services provided by the Department of Veterans Affairs at its medical centers and in the community.

Do HUD-VASH Vouchers qualify for fungibility under the Standard MTW Agreement?

- HUD-VASH Vouchers are not eligible for fungibility under the MTW agreement.

What are the operating requirements for HUD-VASH Vouchers?

- HUD-VASH Vouchers have separate operating requirements and must be administered in accordance with the requirements listed at www.hud.gov/offices/pih/programs/hcv/vash. The operating requirements waive and alter many of the standard HCV statutes and regulations at 24 CFR 982. Unless stated in the HUD-VASH operating requirements, however, the regulatory requirements at 24 CFR 982 and all other HUD directives for the HCV program are applicable to HUD-VASH vouchers.

Are there any operating MTW flexibilities that can be applied to HUD-VASH Vouchers?

- PHAs may submit a request to the Office of Public Housing and Voucher Programs to operate HUD-VASH Vouchers in accordance with MTW administrative flexibilities.
- The request must identify the specific MTW provisions the PHA wants to apply to HUD-VASH vouchers.
- When assessing the request the Voucher Office will consider the impact of the MTW provisions on the target population. If the MTW provisions are not detrimental to the intended population, HUD may approve the request and waive the HUD-VASH operating requirements accordingly.
• If approved to operate in accordance with MTW flexibilities the agency must update its Administrative Plan but would not be required to amend its Annual MTW Plan.
• In cases where MTW flexibilities conflict with VASH statute or NOFA requirements, the VASH/NOFA requirements take precedence over the MTW flexibility.

What are the reporting requirements for HUD-VASH Vouchers?

• PHAs must follow reporting requirements contained in Notice PIH 2010-12.
• PHAs must submit a regular HUD-50058 for HUD-VASH families using VASH as a special program code.
• If PHAs have received approval from the Office of Public Housing and Voucher Programs to operate in accordance with their MTW agreement, they can also request to submit into the MTW-50058.
• If PHAs utilize MTW flexibilities they must report on HUD-VASH vouchers and their funding separately from other vouchers under the MTW agreement in the VASH Portion of the Voucher Management System (VMS).

Family Unification Program (FUP) and Non-Elderly Disabled (NED) Vouchers

What is the purpose of Family Unification Program Vouchers (FUP)?

• Family Unification Program Vouchers are made available to families for whom the lack of adequate housing is a primary factor in the separation, or threat of imminent separation, of children from their families or in the delay in the discharge of the child, or children, to the family from out-of-home care. FUP vouchers are also made available to youths ages 18 to 21 who left foster care at age 16 or older who lack adequate housing. By statute, FUP vouchers issued to youths may only be used to provide housing assistance for a maximum of 18 months. Family unification vouchers enable these families and youths to lease or purchase decent, safe and sanitary housing that is affordable in the private housing market.

What is the purpose of Non-Elderly Disabled Vouchers (NED)?

• Non-Elderly Disabled Vouchers are designed to provide choices to non-elderly disabled residents in their transition out of elderly designated public housing, care-giving institutions or developments with a preference for elderly tenants.

Do Family Unification Program Vouchers (FUP) and Non-Elderly Disabled Vouchers (NED) vouchers qualify for fungibility under the Standard MTW Agreement?

• FUP and NED funds are not eligible for fungibility under the MTW agreement.
**Do PHAs have the flexibility to operate Family Unification Program (FUP) Vouchers and Non-Elderly Disabled (NED) Vouchers in accordance with their MTW agreements?**

- The NOFA language allows vouchers to be administered in accordance with MTW agreements unless MTW provisions are inconsistent with the appropriations act or requirements of the NOFA.
- In the event of a conflict between an MTW agreement and the appropriations act or NOFA language, the act and NOFA govern.
- Applicable NOFAs include FY2009 NED NOFA, FY 2008 and 2009 FUP NOFA and FY 2008 Certain Developments and Designated Housing NOFA.

**What are the reporting requirements for Family Unification Program (FUP) Vouchers and Non-Elderly Disabled (NED) Vouchers?**

- The HUD-50058 MTW form may be used if MTW flexibilities are applied to these vouchers.
- Special Purpose codes must be identified on HUD-50058 for FUP and NED families.
- PHAs must also report in the FUP and NED components of VMS.

**What fields should agencies use to report FUP and NED vouchers in VMS?**

- PHAs administering FUP vouchers under FY2008 and subsequent FUP NOFAs must report FUP vouchers leased in the “2008 and 2009 Family Unification” field in VMS. PHAs that are still administering FUP vouchers under pre-2008 FUP NOFAs must report FUP vouchers leased on the “Family Unification” field in VMS.
- PHAs report NED vouchers leased in the “2008 and 2009 Non-Elderly Disabled” field in VMS.

**What fields should agencies use to report FUP and NED Vouchers into the MTW-50058?**

- The fields for entering FUP and NED Vouchers are 2n & 2p in MTW-50058. HUD will provide future guidance on new code requirements for FUP.
- Two codes can be entered in each 50058.

**Enhanced and Tenant Protection Vouchers**

**What is the Purpose of Enhanced Vouchers?**

- Enhanced Vouchers are vouchers administered by the local public housing authorities used to subsidize rents for tenants facing a Housing conversion action—owner opt-outs of Section 8 project-based contracts; owner prepayment of the mortgage or voluntary termination of the mortgage insurance of a preservation eligible property (preservation prepayments).
  - HUD is required by statute to offer enhanced vouchers to families impacted by a Housing conversion action under Section 8(t) of the United States Housing Act of 1937, as amended.
Enhanced vouchers may exceed the PHA’s ordinary payment standard used for its regular HCV program, allowing the payment standard to equal the gross rent, provided such rent is reasonable in comparison to other similar, unassisted units on the private market.

Enhanced vouchers provide the tenant the right to remain in the unit after the conversion to market rents.

If the family moves from the unit, the voucher loses its enhancement and becomes a regular voucher.

Notice PIH 2001-41 provides additional detailed information.

What is the purpose of Tenant Protection Vouchers (TPVs)?

- Tenant Protection Vouchers (TPVs) are ordinary tenant-based vouchers administered by the local public housing authorities used to subsidize rents for tenants facing a Housing conversion action or HUD enforcement actions against the owner not covered by Enhanced Vouchers—termination or non-renewal of a Section 8 Project-based housing assistance payment contract, sale or foreclosure of a HUD-subsidized mortgage, or demolition/disposition of public housing under Section 18 of the United States Housing Act of 1937, as amended.
  - TPVs do not have an enhanced payment standard and the tenant does not have the right to remain, for example, because in some circumstance the condition of the property does not comply with voucher HQS. Therefore, the tenant must move in order to continue receiving assistance (unless specifically provided in statute e.g., voluntary conversions).
  - Notice PIH 2001-41 provides additional detailed information.

What types of families qualify for Enhanced and Tenant Protection Vouchers?

- Enhanced and Tenant Protection Vouchers are targeted to specific families affected by a Housing conversion action by HUD or owner action in HUD multifamily projects and public housing agencies in the case of public housing projects.
- The vouchers must be offered to specified families according to statute.

Do Enhanced and Tenant Protection Vouchers qualify for fungibility under the Standard MTW Agreement?

- Enhanced and Tenant Protection Vouchers funds are eligible for fungibility one year after a family receives the voucher. If the housing agency decides to utilize fungibility the family must still be provided assistance until the end of the initial protection period which lasts until the family moves out of the residence where the voucher was originally received or is terminated from the program.
- Once the initial protection period ends the Enhanced or Tenant Protection voucher becomes a regular voucher.
Can MTW fungibility apply to any remaining Enhanced and Tenant Protection Voucher funds after all families affected by housing conversion are provided assistance?

- All housing choice vouchers (enhanced and non-enhanced) provided in connection with a Housing conversion action are to be used first to assist the families targeted for assistance.
- Once all families impacted by the Housing conversion action have been provided a voucher, any unused vouchers may be used by the PHA to assist families on the PHA’s waiting list. MTW Agencies can also include any unused Enhanced and Tenant Protection Vouchers in their MTW Block Grant.

Do PHAs have the flexibility to operate Enhanced and Tenant Protection Vouchers in accordance with their MTW agreements?

- Agencies can operate Enhance and Tenant protection Vouchers in accordance with their MTW Agreements one-year after the voucher is originally issued. Any flexibility used can not infringe on the protections applied to these families. The Enhanced or Tenant Protection status lasts until the family moves from the residence or is terminated from the program.

What are the operating Requirements for Enhanced and Tenant Protection Vouchers?

- There are no specific operating requirements.
- Policy and processing guidance is provided in Notice PIH 2001-41 and applicable statutes.

When should Agencies report Enhanced and Tenant Protection Vouchers in the MTW-50058 versus the regular 50058?

- Agencies must report Enhanced and Tenant Protection Vouchers into the regular HUD-50058 during the initial one-year term.
- After the initial one-year term if the Agency applies any MTW flexibilities to these vouchers, the Agency must begin reporting these families in the MTW-50058.

What are the reporting requirements for Enhanced and Tenant Protection Vouchers?

- The MTW-50058 has a field that enables tracking of special purpose vouchers.
- VMS describes the different special purpose voucher types so it is clear how to report expenditures under each of these programs.

What fields should agencies use to report Enhanced and Tenant Protection vouchers into the HUD-50058 and the MTW-50058?

- The field for entering Enhanced and Tenant Protection vouchers is 2q through 2u in the HUD-50058.
• The MTW-50058 does not have a specific place to note Enhanced or Tenant Protection Vouchers. Therefore, agencies can use one of the PHA use only lines, using the code EV (Enhanced Vouchers) or TPV (Tenant Protection Vouchers).

List of HCV and Public Housing Special Programs

Is there a list of special purpose programs that can be entered into the MTW-50058?

• A list of special purpose programs that can be entered into the MTW-50058 is provided below for Public Housing and Housing Choice Vouchers.

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<thead>
<tr>
<th>Housing Choice Voucher Special Programs include:</th>
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<tr>
<td>DHAPIK, DHAP-IKE</td>
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<td>DHAPK DHAP 85M</td>
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<tr>
<th>Public Housing Special Programs include:</th>
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