

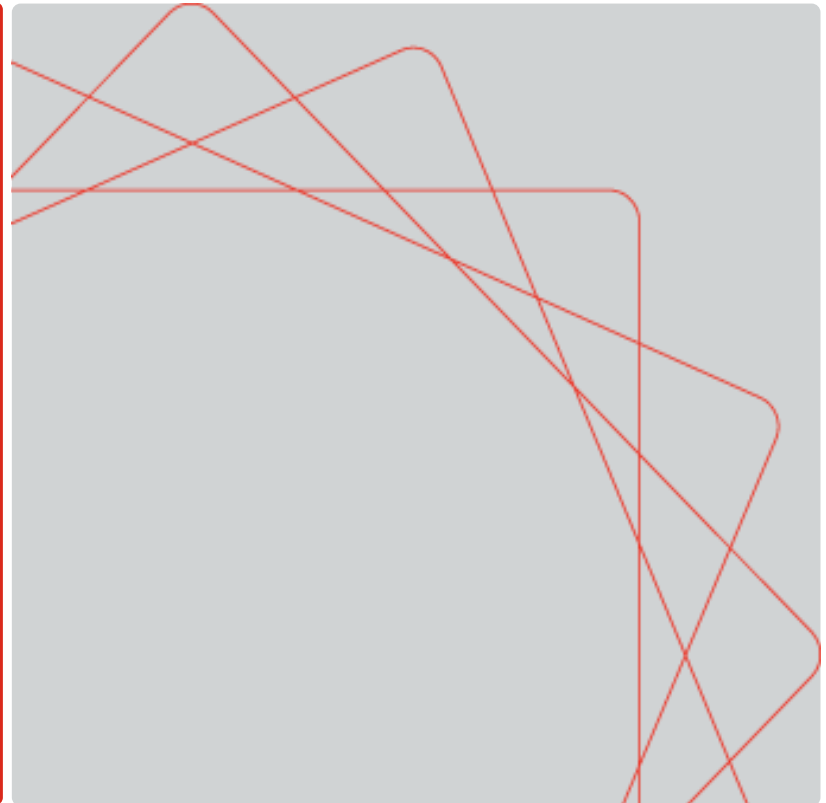


# MTW Performance Measures

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# Overview of MTW Research Study



- Commissioned by HAI Group and advised by a committee that includes CLPHA, NAHRO, PHADA, and Cambridge HA.
- Study has three parts:
  - Documenting MTW Innovations: Released December 2014 (can be found at [www.pahrc.org](http://www.pahrc.org))
  - Develop MTW Performance Measures: **Today's Discussion**
  - Test Feasibility of performance measures (in progress): **Today's Discussion**
- Abt team: Larry Buron, Melissa Vandawalker, Jill Khadduri, Tyler Morrill, Eliza Keen, and Jeffrey Lubell.
- HAI Lead: Keely Stater

# Categories for Performance Measures are Based on MTW Goals



- Cost Effectiveness
- Economic Self-Sufficiency
- Increase Housing Choice
  - Quantity and Quality of Affordable Housing
  - Residential Stability for Targeted Households
  - Expand Geographical Choice
- Other Key Metrics

# Guiding Principles for Developing MTW Performance Measures



- Focus on measuring outcomes (rather than inputs)
- Measure outcomes at an agency-wide level, rather than trying to document outcomes of specific innovations
- Use standard measures rather than locally defined measures
- Measures that apply to both MTW and Non-MTW PHAs and capture the non-traditional activities of MTW PHAs

# 118 Non-MTWH PHAs Selected as Comparison Agencies



- To put the measures in context, we need a counterfactual:
  - What would performance look like if agency was not an MTWH agency?
- Rigorously selected 3 to 5 Comparison PHAs for each MTWH PHA in same Census Division and with same program type (S8-only, both S8 and PH) that are also similar in:
  - Voucher program size
  - Number of PH units
  - Economic conditions (poverty and unemployment rate)
  - Rental market (FMR, median income for renters)

# Data Sources



- HUD provided data from:
  - Financial Disclosure Statement (FDS)
  - 50058 and 50058-MTW PIC data
  - REAC physical inspections
- MTW Annual Reports
- Public datasets: Pictures of Subsidized Housing, Voucher Management System (VMS), FMR, Income Limits, and American Community Survey
- Where otherwise not available, PHA-supplied data from email survey

# Data Quality Issues



- Data for individual PHAs were not always consistent across sources
- Across PHAs, data were reported data in different ways in the Annual MTW Reports and survey
- Outliers (actual or bad data)
- HUD often provided MTW and non-MTW data in different formats indicating possible differences in how data originally reported
- Low response rate to survey (28 of 38 MTW agencies, 44 of 118 comparison PHAs)
- Some MTW agencies did not have 2014 Annual Reports available
- Data quality issues are fixable if data reported by PHAs specifically for performance measurement system with well defined measures, data consistency checks, and PHA verification that the measures are accurate.

# Economic Self-Sufficiency (non-elderly, non-disabled households)



- 1. Percent of households with earnings increase since admission/earliest date available**
- 2. Percent of households with earnings decrease since admission/earliest date available**
- 3. PHA average annual change in earnings**
4. [Share of households heads unemployed at admission, but now employed]
5. [Share of household heads employed at admission, but now unemployed]
6. [Share of households with positive exits]



## Earnings Growth for Non-Elderly, Non-Disabled Households (inflation adjusted)



	MTW PHAs (n=38)	Comparison PHAs (n=118)	Difference
<b>Average PHA % of HHs with...</b>			
<b>Increased earnings</b>	47.4%	43.2%	4.2 p.p.*
<b>Decreased earnings</b>	33.9%	32.0%	1.9 p.p.*
<b>Zero earnings in both periods</b>	18.7%	24.7%	-6.0 p.p.*
<b>PHA average annual change in earnings</b>	\$532	\$421	\$111*

# Quantity and Quality of Affordable Housing



- 1. Voucher unit utilization rate**
- 2. Public housing occupancy rate**
- 3. Number of unit years and voucher years of non-traditional assistance**
4. Physical inspection (REAC) score of public housing developments
5. Number of units preserved as affordable housing (non-PHA owned)
6. [Number of unit years added to the life of the agency's public housing stock]

# Voucher Utilization Rate and Public Housing Occupancy Rate



	MTW PHAs	Comparison PHAs	Difference
<b>Utilization of Available Voucher Slots</b>			
Average PHA utilization rate	89.3%	90.9%	-1.6 pp*
# of MTW PHAs that have higher rate than comparison PHAs	17 of 38 MTW PHAs		
<b>Occupancy Rate of Public Housing</b>			
Average PHA occupancy rate	92.7%	92.5%	0.2 pp
# of MTW PHAs that have higher rate than comparison PHAs	18 of 33 MTW PHAs		
<p><b>Note: MTW PHAs added between 12,000 and 14,500 voucher slots or public units since the start of MTW.</b></p>			

# Non-Traditional Assistance



- Of the 26 MTW PHAs that provided information on non-traditional assistance
  - Approximately 5,300 unit years of property-based housing assistance
  - Approximately 2,600 unit years of tenant-based assistance

# Promoting Residential Stability for Targeted Populations



1. Total number of targeted households served through service partnerships
2. **Total number of FTE service coordinators and service coordinators per household for**
  - **Elderly and disabled households in public housing**
  - **Non-elderly, non-disabled households in public housing**
  - **HCV households**
3. [Number of units created or modified to meet accessibility needs or aging in place]
4. [Share of targeted population successfully retained in assisted housing]

# Service Coordinators



	MTW PHAs (n=23)	Comparison PHAs (n=36)	Difference
<b>Overall</b>			
<b>PHA average # of FTE service coordinators</b>	10.8 (3.7)	1.9	8.9* (1.8*)
<b># of PHAs with a Service Coordinator</b>	14 of 23 PHAs (61%)	14 of 36 PHAs (39%)	--
<b>For Elderly or Disabled Households in PH</b>			
<b># of PHAs with Service Coordinator</b>	9 of 23 PHAs (39%)	14 of 36 PHAs (39%)	--
<b>For non-elderly, non-disabled Households in PH</b>			
<b># of PHAs with a Service Coordinator</b>	11 of 23 PHAs (48%)	12 of 36 PHAs (33%)	--
<b>For HCV Households</b>			
<b># of PHAs with a Service Coordinator</b>	11 of 23 PHAs (48%)	5 of 36 PHAs (14%)	--

# Expanding Geographical Choice



1. **Percent of voucher holders that live in neighborhoods with a poverty rate:**
  - **Below the median for the PHA's jurisdiction (city/county/state)**
  - **Below the 25<sup>th</sup> percentile for the PHA's jurisdiction**
  - Below the median for the metro area (or state for statewide PHA)
  - Below the 25<sup>th</sup> percentile for the metro area
2. Share of vouchers that are port-ins
3. Share of vouchers that are port-outs
4. Share of vouchers that are project-based

# Poverty Rates Where Voucher Holders Live Compared to PHA's Jurisdiction



Performance Measure	MTW PHAs (n=38)	Comparison PHAs (n=118)	Difference
Below the median	26.3%	26.5%	-0.2 p.p.
In the lowest 25 <sup>th</sup> percentile	7.6%	7.5%	0.1 p.p.



# Other Key Metrics



- 1. Percent of households with income <30% of AMI, between 30 and 50% of AMI and > 50% of AMI**
  - New admits to voucher program
  - New admits to public housing
  - All voucher holders
  - All public housing households
- 2. Average of rent as percent of gross income**
- 3. Percent with reasonable rent burden (\$100 or less or less than 40% of gross income)**
- 4. Length of time on voucher**
- 5. Length of stay in public housing**

# Income of New Admittances



Performance Measure	MTW PHAs (n=38)	Comparison PHAs (n=118)	Difference
<b>Newly Admitted Voucher Households with Income Relative to AMI of</b>			
at or below 30%	77.7%	80.8%	-3.1%*
>30% and <=50%	19.0%	17.9%	1.2%
>50% and <=80%	3.1%	1.3%	1.8%*
<b>Newly Admitted Public Housing Households with Income Relative to AMI of</b>			
at or below 30%	81.2%	84.7%	-3.5%*
>30% and <=50%	14.3%	12.5%	1.8%*
>50% and <=80%	4.4%	2.7%	1.7%*

# Length of Stay



Performance Measure	MTW PHAs	Comparison PHAs	Difference
<b>Voucher Program</b>	(n=38)	(n=116)	
<b>Average Years</b>	7.4 years	8.3 years	-0.9 years*
<b>Median Years</b>	7.7 years	8.1 years	-0.4 years
<b>Public Housing</b>	(n=35)	(n=105)	
<b>Average Years</b>	6.5 years	6.6 years	-0.1 years
<b>Median Years</b>	6.1 years	6.5 years	-0.4 years

# Cost Effectiveness Measures



1. Voucher admin costs per voucher-year
2. PH operating cost per occupied unit-year
3. HAP subsidy per voucher-year

# Cost Measures – Still in Development



- For Non-MTWT Agencies, can use FDS data:
  - HAP for the HCV program divided by number of unit months leased for HCV program
  - Total Operating expenses for the HCV program divided by number of unit months leased for HCV program.
  - Total operating expenses for the Low Rent Public housing program divided by number of unit months leased for Low Rent Public Housing program.
- Issues for MTWT that led us to survey data
  - Non-traditional assistance could be under HCV or PH program expenses.
  - Does HAP in FDS represent HCV HAP only?
- Large range of MTWT cost estimates from survey
  - Would like to confirm / get info from sites that have not yet provided it.

# Summary (preliminary)



- The picture of how MTW agencies do on these performance measures is inconclusive as we still have other measures to finalize and other data quality checks to do.
- Of the results shown:
  - Sometimes MTW appears to do better, particularly on measures related to the MTW goals (higher earnings growth);
  - Sometimes non-MTW agencies appear to do better (HCV utilization) and some times no different (PH occupancy rate, poverty rate of neighborhood).
  - Both, on average, meet standard PHA requirements for serving ELI.
  - MTW agencies have used their flexibility to provide thousands of additional people with non-traditional (non-HCV, non-PH) housing assistance.
- There is a lot of variation across MTW PHAs and comparison PHAs, so need to flesh out when findings being driven by small number of PHAs and when it's a consistent story.

# Recommendations for MTW Performance Reporting System



- Revise and possibly reduce the performance measures based on the experience and feedback on these measures.
- Create more detailed definitions of measures.
- Collect prospectively.
- Imbed data consistency checks in data collection tool and have external check (flag outliers, compare to other data reported, compare to previous year).
- **Design performance measurement system so that PHAs can see building blocks of each measure and verify the accuracy of their data.**
- Consider requesting applicable measures for non-MTW agencies as well.