CAMBRIDGE HOUSING AUTHORITY

MOVING TO WORK

CHA

ANNUAL REPORT 2022

January 1, 2022 - December 31 , 2022

About the Artist

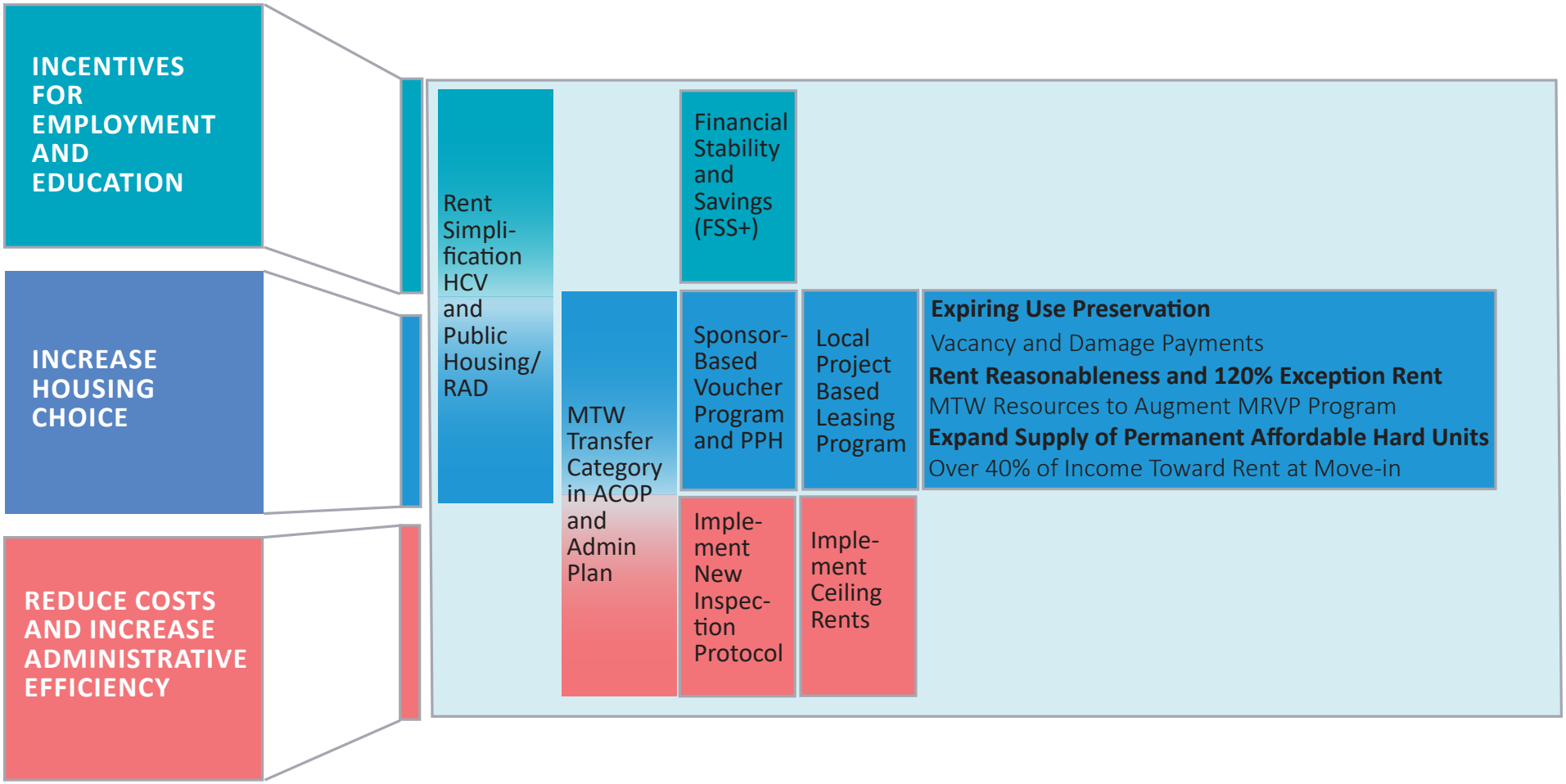
Tamanna Syed is an author of the "Falcon and the Dove" poetry book. She is a Bangladeshi American artist, poet, advocate, and public health professional. She has received an MPH candidacy from the BU School of Public Health and has studied at Harvard TH Chan.

While her interests are in health program management and communications, art and digital media are her passions. She has curated public health films highlighting quality healthcare promotions in historically marginalized communities.

Tamanna loves screenwriting, film, painting, listening to music, and spending time with loved ones. For queries and information, reach out to her at asktsyed@gmail.com.

UNITY Drawing

This image represents the positive spirit of family, community, and diversity which all translate into happiness. Women are the backbone of society—they bring life into the world and care for the young and old. Therefore, I chose to portray a woman as the center of our community, though the spirit of children, men, and the nonbinary are integral to us. My mother when single, raised us with much hope and triumph. Though we collectively face adversity (the clouds and the rain), there is always light and hope for us—which is represented by the sun and the rainbow. We all love eating ice cream in the summertime and feeling connected to friends and family. Unity is what brings us together, regardless of which direction we are facing in our community—be it the North, South, East or the West. Be it our passion for basketball, play, the outdoors, or an education, or be it our desire for belonging and a sense of home. There is a spark within all the members of the Cambridge community.



CHA has used its flexibility under MTW as a platform for progressive regulatory reform and fungibility of capital, voucher, and operating funds to accomplish development and programming goals. The agency continues to develop, implement, and evaluate new and innovative policies and programs.

This diagram is a visual representation of CHA's various initiatives under the MTW program and how these relate to the statutory objectives stated above.

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FREQUENTLY USED ACRONYMS

ACT	Alliance of Cambridge Tenants	**MTW**	Moving to Work
DHCD	Department of Housing and Community Development (Commonwealth of Massachusetts)	**NED**	Non Elderly Disabled (federal non-MTW voucher type)
DISPO	Demolition and Disposition of public housing under Section 18 of the Housing Act of 1937	**PPH-HH**	Pathways to Permanent Housing- Heading Home
EOP	End of Participation (in receiving subsidized housing from CHA)	**PPH-TH**	Pathways to Permanent Housing- Transition House
EOS	End of Subsidy	**PBV**	Project Based Voucher
ESCO	Energy Service Company	**RAD**	Rental Assistance Demonstration program
ESOL	English for Speakers of Other Languages	**RIS**	Reduction in Subsidy
FMR	Fair Market Rent	**RTS**	Rent-to-Save
FSS+	Financial Stability and Savings Plus	**SBV**	Sponsor-Based Voucher
HAP	Housing Assistance Payment	**TBV**	Tenant-Based Voucher
HCV	Housing Choice Voucher	**TPP**	The Possible Project
HILAPP	High Leverage Asset Preservation Program (Commonwealth of Massachusetts)	**VASH**	Veterans Affairs Supportive Housing (federal non-MTW voucher type)
HUD	US Dept of Housing and Urban Development		
LEP	Limited English Proficiency		
LIHTC	Low Income Housing Tax Credit		
MRVP	Massachusetts Rental Voucher Program (Commonwealth of Massachusetts)		

CHA HIGHLIGHTS

ANNUAL REPORT FISCAL YEAR 2021

JANUARY 1, 2022 TO DECEMBER 31, 2022

HOUSING CHOICE

- Continued use of Small Area FMRs
- Only 40 units remaining to convert from Public Housing through RAD/FPLI

SELF-SUFFICIENCY

New FSS+ Escrow Calculation and Homeownership Incentive

- New escrow calculation methodology officially rolled out in FY21
- Program enrollment re-opened in FY21 and ramped up in FY22

COST EFFECTIVENESS

Institution of online platform for the opening of the Family Public Housing Waitlist

- Over 21,000 distinct applicants
- Includes site-based waitlists.

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CHA DEPARTMENT ACCOMPLISHMENTS

OPERATIONS

PROPERTY MANAGEMENT/PUBLIC HOUSING

The Operations Department maintains the grounds, buildings, building systems and all other aspects of CHA's portfolio of hard units. This includes various Affiliate and non-profit properties. The majority of CHA's portfolio has converted to Low Income Housing Tax Credits (LIHTC) with project-based subsidies under HUD's Rental Assistance Demonstration (RAD) and Section 18 Disposition, laying the groundwork for a full conversion within the next three years

COMMITMENT TO HEALTHY RESIDENTS AND STAFF

Although CHA's COVID protocols have been updated to reflect this stage in the pandemic, healthy residents and staff remains a priority for the Operations department. Increased sanitation protocols remain in effect and will indefinitely remain as our standard for the foreseeable future. Lockboxes are collecting paperwork at each site, and residents have the option to conduct the majority of transactions with residents over e-mail, phone, or in person. The Department remains vigilant and effective at providing personal protective equipment and sanitation supplies for the sites and will continue to be as necessary in FY23. CHA has continued to partner with our local Department of Public Health to offer on site testing and vaccination clinics in many of our community rooms and community centers.

STAFF ENRICHMENT

Operations maintains that a major component to the success of the agency is the successful training of our employees. We are continuing to educate staff via the Institute of Real Estate Management (IREM) certifications and tax-credit education via Spectrum Enterprises and US Housing Consultants. Property Management staff and leasing officers attended a two-day in-person tax-credit training hosted by Amanda Lee Gross from U.S. Housing Consultants in late May 2022. Our relocation division attended a Temporary Relocation Guidance training with the Massachusetts Department of Housing & Community Development in September 2022. We also have continued to develop staff's soft skills (supervising staff, building a Property Management team, etc) through the Say Yes Institute. The department continues to look out for more training opportunities as they arise in FY23.

PROPERTY MANAGEMENT SOFTWARE CONVERSION

The Operations Department continues to offer its expertise and services to other communities in Massachusetts. In Cambridge, CHA provides Property

Management services to the YWCA of Cambridge, which is a 103 SRO. Since taking over the management in 2019, CHA has enhanced the quality of life, services provided, and living conditions for the 103 woman who reside at the Y, all while using funds more efficiently and lowering the vacancy rate significantly. CHA took over management of the Belmont, MA Housing Authority in 2020. Belmont, MA is a neighboring community with 253 units of Affordable Housing as well as a small voucher program. CHA has seamlessly transitioned oversite of BHA by increasing reporting capabilities, strengthening financial oversight, lowering vacancy loss, and improving resident engagement and community relations. CHA has also begun providing relocation services to the Medford, MA Housing Authority and Lexington, MA Housing Authority. These engagements have allowed CHA to assist these smaller agencies to move ahead with modernization efforts while facilitating these moves for their resident populations.

CONTINUED CONSTRUCTION RELOCATION

Having been delayed by the COVID-19 pandemic, relocation efforts will continue throughout FY23 and will rely on the use of vacant units across the portfolio to house those residents affected while renovations continue. This relocation process and targeting the use of vacant units citywide has proven to be successful in prior years. With additional Section 18 Disposition and RAD projects scheduled, we anticipate that Relocation efforts will continue beyond 2023. CHA continues to provide the best housing solutions for residents and has a strong working relationship with residents and management staff to ensure a smooth transition. Our relocation staff works closely with every family that faces relocation to find them a unit that meets their needs and preferences whenever possible. The agency is committed to performing these tasks at the highest level and has a dedicated team of (4) full-time employees for this process.

SAFETY AND SECURITY

As our commitment to quality housing continues and we've recognized that we must be more creative in establishing a comfortable level of safety for our residents. Having secured new federal funding in FY21, all sites are in the process of being equipped with high tech security camera systems to cover more area on the property and coupled with a digital recording system that provides a quicker method to locate specific footage. We plan to award a contract to MDS Security, Inc. to provide security services at Manning and Millers River Apartments. In addition, MDS will also provide a roving patrol vehicle to visit other CHA properties, increasing both Safety and Security throughout all CHA developments. Property Management teams and maintenance staff continue to physically inspect entry doors and grounds to ensure there is no easy path of entrance for non-residents. CHA will continue monthly briefings and sharing information regarding Safety and Security in the developments between the Property Management staff at CHA and the Cambridge Police Department (CPD) via online video conferencing. In addition, lighting surveys are done at every development throughout the city twice a year. These lighting surveys are done after dark to ensure that the properties are adequately illuminated. With effort to empower residents to feel safer in their neighborhoods, CHA holds

sporadic neighborhood meetings with CHA residents and the Cambridge Police Department (CPD). The goal of these meetings is to build a strong bond, trust, and respect between all parties involved. This gives CHA residents a platform to express safety concerns in their neighborhood and gives CPD a forum to outline their efforts and strategy to keep the neighborhood safe. CHA uses these multiple platforms to partner with the Cambridge Police Department and Cambridge Fire Department to bring services and information to our resident population. CHA maintains a great working relationship with both agencies and relies on the agencies to make our properties safer.

LEASED HOUSING

The Leased Housing Department is responsible for the administration of CHA's Housing Choice Voucher and related programs. This includes the Moving to Work Tenant-Based and Project Based Voucher programs, the Sponsor Based & Pathways to Permanent Housing programs, Mainstream and Designated Housing Voucher Programs, the Veterans Affairs Supportive Housing Program (VASH), the Emergency Housing Voucher (EHV) program, the Mod Rehab Single Room Occupancy (SRO) programs, as well as McKinney Vento Homelessness assistance programs. Additionally, the Leased Housing Department administers vouchers funded by the Commonwealth of Massachusetts through the Massachusetts Rental Voucher Program (MRVP), the Alternative Housing Voucher Program (AHVP), and the Department of Mental Health (DMH). Through this variety of programs CHA serves a diverse population of individuals and families. Additionally, in FY2022, the Leased Housing department expanded our staffing to be able to provide oversight, administration, and calculation of the Housing Assistance Payments (HAP) for the CHA and affiliate owned properties that have converted to Section 8 assistance through various programs including the Rental Assistance Demonstration (RAD) Program and the Section 18 Disposition Program.

In FY2022 the CHA Leased Housing Department received an allocation of 16 FairShare vouchers which are new HCVs; submitted a request for additional VASH vouchers with the Boston VAMC, our VASH partner and were awarded 11 new VASH HCVs and applied, in partnership with the Cambridge CoC for an allocation of the newly allocated Stability Vouchers (awards are still pending). Building off our success in issuing the 128 EHV vouchers that were awarded in FY2021, the CHA is confident that we are a viable candidate for future opportunities for additional vouchers and will continue to pursue those that we are eligible for.

As of the end of FY2022, the CHA has issued out 116 of the 128 EHV vouchers of which 87 which have leased or have a unit in process. There are currently 33 applicants who have been issued a voucher and are searching for a unit. In addition, there are 25 referrals that are in the eligibility process as we anticipate that some applicants who were referred will not lease a unit using their EHV. We are on target to reach out goal of having all 128 vouchers issued and leased up by Fall 2023.

One of the Enhanced Voucher projects awarded in 2021 was brought online in 2022 and two of the Mainstream PBV projects that were awarded previously, were moving closer to leasing at the end of FY2022 and we anticipate they will be fully leased and under contract in early FY2023.

The transition of having the CHA and affiliate-owned properties' subsidy payments reviewed, entered, and paid by the Leased Housing Department, went well during the year. We now have a greater checks and balances in the payment of HAP and continued financial health of the sites.

As the agency began to move out of the COVID-19 pandemic and back to more normal operations, the Leased Housing Department has continued to utilize online tools and forms to streamline the recertification process and experience for participants. Feedback was very positive and it makes the process easier for many participants and lends to better quality document management. We continue to make in-person meetings available to those who need or want to meet in person, but participants are no longer required to meet in our office.

CENTRAL OFFICE

The Central Office is located at 362 Green Street and headquarters for all departments except property management and maintenance staff in the Operations Department and a large portion of the Resident Services staff.

LEGAL

National Policy Direction

The Legal Department continued to work to address the inadequacy of volume cap for private activity bonds that generate Low Income Housing Tax Credits due to limitations imposed under the federal Internal Revenue Code Section 42. Working closely with Congresswoman Katherine Clark on the SAVE Federally Assisted Housing Act, CHA assisted in building support for the bill in the Senate and in other regions of the country. CHA will continue to work on new iterations of relief for the tax credit program in the coming months.

CHA General Counsel also participated in negotiations with HUD over HUD's proposed amendment of the Annual Contributions Contract between HUD and public housing authorities, representing the MTW Collaborative at the discussions at HUD Headquarters.

Local Legislative Reform

After 15 or more years of advocacy seeking relief from burdensome state procurement requirements for construction projects, the Massachusetts legislature adopted revisions that exempt major redevelopment projects from these rules, which is likely to save CHA millions of dollars by reducing construction costs by 25-35%.

Portfolio Conversion

The Legal Department works closely with Planning & Development on each of its development projects, addressing legal issues relate to HUD programs such as Faircloth to RAD conversions, applicability of federal procurement standards, Section 3 requirements, relocation, fair housing, public bidding, and transactional support. The Legal Department was proud to work on the closing of 116 Norfolk Street, which utilized all the conversion tools that HUD has to offer, and will create 62 units of deeply affordable permanent supportive housing for the homeless in Cambridge.

Reasonable Accommodation

CHA has a robust reasonable accommodation program. In the last year, CHA's Reasonable Accommodation Officer/Senior Program Manager processed over 408 individual cases. Of those, only 4 were appealed to an independent appeals officer, and all 4 decisions were upheld. CHA plans on conducting ongoing training for site staff on the RA process.

Tenancy Preservation

As the moratoria on evictions related to COVID 19 have ended, the Legal Department coordinated with Operations and Executive on an education and outreach process for a transition to more traditional procedures. The Legal Department (Legal Assistant Sandra Figueira) played a key role in reviewing internal systems to insure that new software accurately represented each resident's record of payments so as to avoid erroneous filing of legal process. CHA continues to maintain its approach to avoid initiating eviction action where possible and to encourage early interventions by operations and referral to outside resources and assistance for residents in need.

Governor's Council Against Sexual Assault and Domestic Violence - Housing Stability and Self-Sufficiency Working Group
CHA continued to contribute its experience in development of protocols and training for Sexual Assault and Domestic Violence that it anticipates will be shared with agencies state-wide. The working group focused on preparing to work with state agencies around best practices for working with survivors. The group intends to host a training for local housing authorities in the near future. The council is now on break until the new administration is in place.

City of Cambridge Domestic Violence Steering Committee
CHA continues to participate in the DV working group. This year, the group worked with Start by Talking LLC to conduct a city-wide needs assessment to determine responsiveness from Cambridge service providers as it relates to DV disclosures. CHA is continuing to work with Transition House to develop/ implement ways to improve responsiveness when a resident discloses DV.

Director of Service Coordination & Senior Program Manager Quarterly Meetings
Kenneth Hebert & Rashida Golden Jolly met quarterly this year to brainstorm and professionally collaborate around ways to increase clinical skills/capacity for the resident service coordinators. CHA has more social workers on staff as part of the Resident Services Coordinator team.

POLICY AND TECHNOLOGY LAB EAST

INTERNS
The PTLab is currently hosting an internship focused on studying Accessory Dwelling units (ADUs) as a tool to facilitate the growth of affordable housing. Additionally, the PTLab is providing data to a Masters in Public Policy candidate at the Kennedy School to explore the creation of a homesharing service or network. This is in addition to annual completion of the MTW Annual Plan and Report.

HUMAN RESOURCES

The Human Resources team successfully led the agency through the final phase of its Phased COVID-19 Reopening protocols while maintaining a safe workplace and living environment for staff and residents. Despite a challenging labor market, we have been able to retain top talent and have expanded our workforce in response to increased demand for services. We continue to offer engagement strategies for staff such as Bucketlist™ which allows staff and management to recognize peers for reflecting our values of teamwork, communication, results, empathy and collaboration. We have also supported the agency in bringing its negotiation of two successor contracts through the collective bargaining process to a successful close bringing popular benefits such as paid parental leave to our workforce for the first time in history. CHA continues to promote an inclusive culture that values respect and open communication, and that reflects the diversity of the communities in and around Cambridge that we serve. Our efforts have led to the adoption of a formalized Diversity, Equity, and Inclusion committee (DEIC) focused on addressing systemic racism and its impacts to our workforce, our residents, and our community.

RESIDENT SERVICES

FUNDRAISING FOR RESIDENT SERVICES EMPOWERMENT ENDOWMENT

Since 2018, the CHA's Resident Services Department has conducted a multi-faceted fundraising campaign to secure additional funding for our successful youth development programs, and to lay the groundwork for innovations in the coming years. Since the inception of the campaign, Resident Services has secured between $1 and $1.5 million annually from external sources, including private donors, increased outlays from continuing partners, and a variety of new regional foundations.

In late 2021, the Resident Services department was the recipient of a $500,000 gift from a private donor to start an endowment with the intent of providing long-term support for our in-house programming. In early 2022, we finalized the structure and guidelines for the endowment and selected the Cambridge Community Foundation to manage the administration of the fund.

Over the recently-completed fiscal year, we raised an additional $1 million to bring the fund to $1.5 million at the start of FY 2023. Our success led the seed funders to commit another $350,000 to the fund for 2023, which will help us to maintain momentum in attracting new funders.

Our long-term goal is to grow the endowment to between $3 and $5 million to ensure a sizeable annual interest yield that can support targeted programmatic needs and new initiatives.

PARTNERSHIP WITH JUST-A-START'S BIOMEDICAL AND INFORMATIONAL TECHNOLOGY CAREERS PROGRAMS

In the summer of 2022, the Resident Services department initiated a partnership with Just-A-Start, with the goal of increasing CHA resident participation in their Biomedical and Information Technology Careers programs. Both programs are full-time, 10-month programs that couple academic training with internships to position participants (a max of 18 in each) for entry-level positions and opportunities for growth in the Biomed and IT fields.

Historically, CHA resident participation in these programs has been scant. To entice resident participation, we created five $7,000 annual stipends to help defray some of the loss of earnings during program completion. We also implemented a robust outreach plan that included a series of informational postcard mailings, and a mixture of online and in-person information sessions conducted by the JAS team.

JAS recently finalized their 2023 cohorts for both programs, which will start after the first of the year. Promisingly, seven CHA residents were selected through the extensive application, testing, and interview process. The first five accepted will receive CHA stipends, and the remaining two will each receive an equivalent JAS stipend drawn through the organization's ARPA dollars. JAS has also placed three additional CHA residents on a waiting list for both programs; they will be tapped if any folks from the overall cohort must drop out early in the program. An opportunity to participate in the 2024 cohort will be available for those that are waitlisted for this year.

These results represent a truly a great start for our partnership. A formal MOU was finalized at the end of FY22 which details the obligations of our partnership. As JAS works to expand both programs over the next couple of years, we will work to develop the pipeline of CHA residents who can take advantage of these important training opportunities in growing fields

INTERGENERATIONAL COMPUTER TRAINING AND INTERNET ACCESS PROGRAM

In partnership with Tech Goes Home, the CHA's Resident Services department launched a specialized inter-generational computer training and internet access program for senior residents at Manning Apartments last spring. Funded by Google's Cambridge campus, the pilot offered two seven-week trainings to cohorts of ten at the development.

Each training was conducted by the Work Force Career Development Specialist and two upper-level Work Force students, who served as interns within the program's employment training component. The team was trained on the Tech Goes Home platform, and worked work with TGH staff to package a series of modules designed specifically for senior residents with limited computer and internet experience. The trainings focused primarily on building awareness around basic functional uses of the internet, along with the importance of cybersecurity measures, with an eye towards protecting senior residents from predatory practices.

In FY23, we will be offering additional training cohorts at the Millers River and Burns Senior developments, and will seek to implement a revised model that incorporates the Service Coordinator from both developments as co-instructors (see description below).

PARTNERSHIP WITH RAGON INSTITUTE

In FY22, Resident Services launched a formal partnership with the Ragon Institute, an immunology research consortium comprised of scientists and medical personnel from M.I.T, Harvard, and Massachusetts General Hospital. The Institute is currently building a new research campus at 600 Main St., near Kendall Square and adjacent to the CHA's Newtowne Court/Washington Elms development.

Over the course of the fiscal year, a variety of Ragon employees volunteered to participate in Work Force program events, such as the "Mock Interviews for Juniors" and "Exposure to Careers" events. Last spring, we also had a Work Force student participate in Ragon's new PRISM program, which offers eight half-day, paid training sessions on consecutive Saturdays in March and April. Each session offers stimulating discussion and hands-on training on cutting edge topics in medical science.

As we build the partnership, we working towards the establishment of a series of paid job experiences for Work Force participants and graduates that will include short-term administrative and STEM-based internships for upper level high school participants, summer internships for college-level program graduates interested in the sciences, and extended research-based internships for program graduates who have completed their post-secondary degrees and are planning careers in the bio-tech and/or medical research fields.

SERVICE COORDINATOR TEAM FOR FAMILY AND ELDERLY DEVELOPMENTS

In April of 2021, the CHA opted to bring a team of eight social workers and clinicians and a Director of Service Coordinators in-house as full-time employees of the CHA's Resident Services department. The Service Coordinating team joined the other 10 full-time and six part-time departmental staff who deliver the nationally recognized Work Force and This Way Onward programs for the agency.

Our focus over FY22 was to integrate the new Service Coordinator team into the department, setting the stage for potential collaborations on intergenerational initiatives that will actively involve teens and young adults from our youth programs. One such collaboration, will unfold this spring in the inter-generational Computer Training and Internet Access Program, detailed earlier in the plan. Working with the Work Force Career Development Specialist, the program will enlist two Service Coordinators as co-instructors in separate cohorts being offered at our Burns and Millers River Senior

developments.

PLANNING AND DEVELOPMENT

In 2022, the Cambridge Housing Authority expended over $77.4 million on construction activities while concluding construction on four large-scale projects impacting 669 apartments at the following properties: Truman Apartments, Millers River Apartments, Burns Apartments, and Roosevelt Towers. Work also was ongoing on one (1) multi-year project: Putnam School where renovations started in 2022, and are now approximately 40% completed. Work at Putnam School is expected to be complete in Spring 2023.

In addition to the construction activity, CHA closed on one financial transaction totaling over $47 million in 2023. With this closing, CHA's total financial investment in its portfolio since 2010 between construction and soft cost exceeds $1 billion dollars, allowing it to preserve 2,059 units and create 90 new units. The chart below details the properties impacted by these investments.

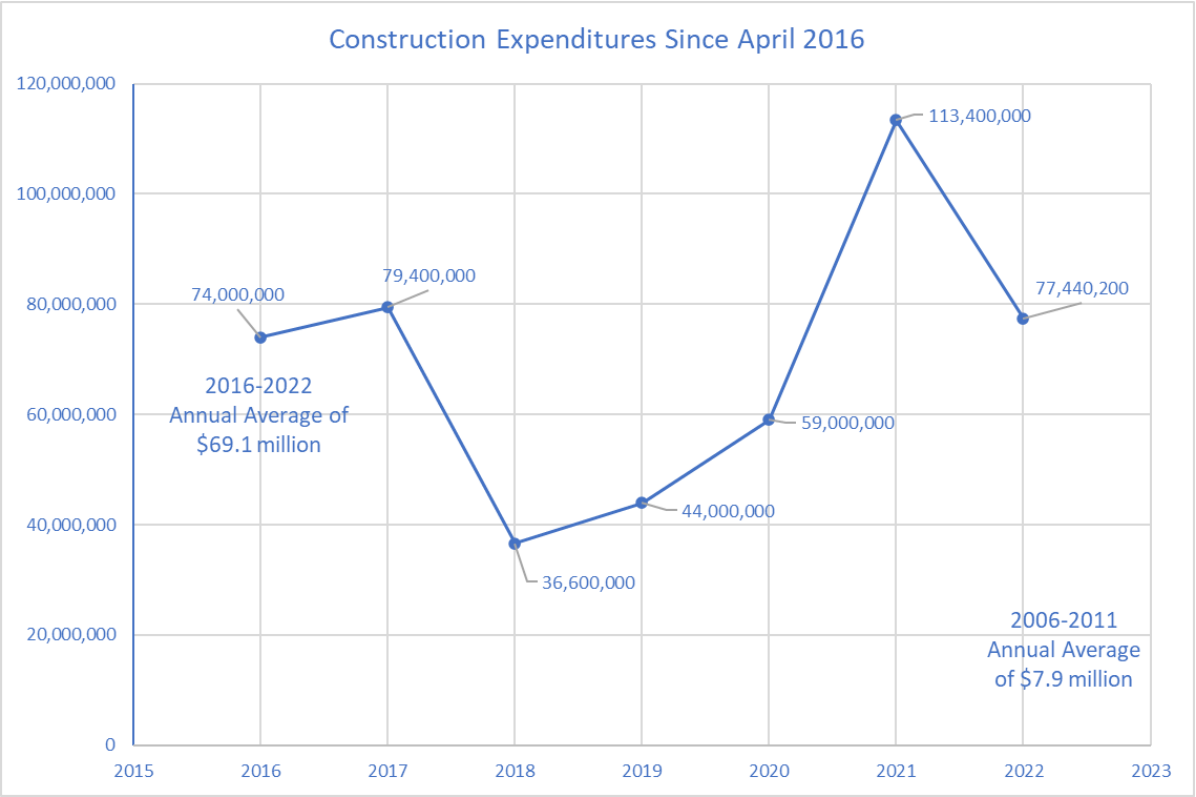
Development	# of Units	Closing Date	Total Financing
Lincoln Way*	70	Sep-10	$35,945,787
Jackson Gardens	45	Sep-10	$22,468,948
Johnson Apartments	177	Sep-10	$69,106,697
Cheryl Ann's Place*	40	Oct-13	$16,571,093
Putnam Gardens	122	Dec-14	$56,389,830
Newtown Court	268	Mar-15	$115,996,359
Washington Elms	175	Mar-15	$76,703,718
Woodrow Wilson Ct	68	Mar-15	$16,447,108
Jefferson Park State	104	Dec-15	$66,022,389
Manning Apartments*	205	Feb-16	$85,514,333
Russell Apartments*	52	Dec-17	$27,788,808
Millers River*	300	Dec-18	$175,618,901
Garfield Street	8	Mar-19	$3,541,833
St. Paul's*	24	Mar-19	$9,358,504
Roosevelt Tower	112	Dec-19	$59,858,381
78-80 Porter Road	26	Jan-20	$18,275,872
Burns Apartments	198	Feb-20	$96,202,489
Truman Apartments	59	Dec-20	$35,976,499
Putnam School*	34	Dec-21	$21,308,479
116 Norfolk Street*	62	Dec-22	$47,214,395
Total	2,149		$1,055,639,961

*Locations of new units

Large-scale construction is on-going at 2 properties totaling over $45 million, and has totaled over $642 million since 2010.

Cambridge Housing Authority's construction efforts, along with the rest of the world, continue to be impacted by the COVID-19 pandemic. As a result of this world-wide pandemic, there have been labor shortage, supply chain disruptions, and time delays. CHA with its construction partners have worked hard to mitigate these impacts and despite the challenge have continued to progress construction activities through these challenging times. Despite these challenges, CHA's overall construction expenditures during 2022 totaled $77.4 million. As the chart illustrates, CHA has expended $483.8 million on construction activities since April 2016, or on average $69.1 million annually in the past seven years. Also shown on the chart is what was the more

typical average of $7.9 million that the CHA was spending on modernization and redevelopment activities prior to ARRA, RAD and Section 18 repositioning activities.



CHA is continuing its efforts to convert remaining units from the public housing program using both the RAD/Section 18 blended process. In December 2022, CHA converted the 37 units at 116 Norfolk Street from the public housing program to the project based voucher program through a RAD/Section 18 transaction leaving CHA with just 52 remaining public housing units. CHA also implemented its plans to use some of its ability to add new federal public housing unit under its Faircloth units. Twenty-five new units are proposed for 116 Norfolk Street and were part of that project's financial closing in December. CHA is proposing to construct 278 new federal public housing units as part of its Jefferson Park revitalization which will be closing on its financing in Spring 2022.

A summary of major construction activities underway in 2022 is provided below.

Construction Projects

Millers River – Total Construction Contract of $115.1 million; $23,206,204 million spent in 2022

CHA closed on the $175.6 million in financing for the Millers River project in December 2018. Upon closing, a formal notice to proceed was issued to the project's Construction Manager, Consigli Construction Company, to begin the $115.1 million renovation project. The project was completed in July 2022, after the project was delayed approximately 4 months due to the COVID pandemic.

The final phases of construction were completed in 2022, resulting in the renovation of the final 41 units of the total 300 units at the site. Work in the units included the complete gut rehabilitation of all building and unit systems and all new interior finishes including new bathroom fixtures and finishes and new kitchen cabinets, countertops and appliances. New energy efficient heating, ventilation and cooling systems have also been installed greatly increasing the comfort and air quality for residents. Completed units include ten barrier free, ADA units, four sensory-adapted units and six adaptable units.

In addition to the unit work, Millers River new Community Center was completed and placed into service in 2021 providing new common area and management space for the residential community. The new space also allows for the CHA to add three additional housing units at Millers River through the repurposing of space previously dedicated for management use.

In 2021, $23,206,204 dollars of the $115.81 million in construction was completed.

Burns Apartments – Total Construction Contract of $71.2 million; $27,619,462 spent in 2022

CHA closed on the $91.6 million in financing for the Burns project in late February 2020. Upon closing, a formal notice to proceed into construction was delivered to the project's Construction Manager, Consigli Construction Company, to begin the $71.2 million renovation project.

Constructed in 1973, Burns Apartment is a 198-unit elderly and disabled development. The renovation work which occurred at Burns Apartments included upgrades of the building systems such as a new exterior cladding system, a new building ventilation system, and replacement of the hydronic baseboard heat system with new four-pipe fan coil system for heat and air conditioning. The project also included replacement of all plumbing and electrical systems, installation of a new co-generation system, installation of a new fire protection system, and modernization of the elevators.

There was also significant work completed in apartment interiors including the remediation of hazardous materials and demolition of interiors, the enclosure of existing balconies to increase interior living space, full renovation of kitchens and bathrooms, replacement of unit load centers and apartment wiring. Moreover, the common areas and management staff offices were renovated and extensive site work and landscaping around the exterior of the building were completed.

In 2022, work was completed on the third and final phase of the three phases of construction resulting in the renovation of the final 76 units at the 198 unit property. Construction at Burns Apartments was completed in August 2022.

In 2022, $27,619,462 dollars of the $71.2 million in construction was completed.

Roosevelt Towers Family – Total Construction Contract of $38.75 million; $13,454,916 spent in 2022

This project began construction January 2020, shortly after financial closing in December 2019, with construction work being split in the four phases. Work was completed in July 2022.

The exterior scope of work at Roosevelt Towers Family included refurbishing the masonry, replacing windows, installing new roofing, repairing cracked and broken sidewalks, repaving the central roadway, and refurbishing common courtyards. The building system scope of work included upgrading the electrical and fire protection systems, creating a new boiler room for the 112 units, replacing all the plumbing and water piping, and installing a new ventilation system in each unit. The unit interior scope of work at Roosevelt Towers Family included upgrading kitchens with new cabinets, countertops, sinks and

faucets, and appliances, upgrading bathrooms with new bathtubs, toilets, and sinks, and refurbishing other interior finishes including painting, flooring, and shades.

In 2022, work in the final two phases was completed allowing the project to reach completion in July 2022 resulting in $13,454,916 in 2022 construction expenditures of the total $38.75 million spent on the project.

78-80 Porter Road – Total Construction Contract of $13.03 million; $916,456 spent in 2022

Originally constructed in 1915, major renovations were initiated at 78-80 Porter Road starting in 2020 and completed in September 2021. The exterior scope of work at the 26-unit property included repairing cracked and broken sidewalks, creating entry ramp for ADA accessibility, completing upgrades to the building's exterior masonry envelope, replacing many lintels and repointing brick, and installing a new roofing system. In addition, all exterior doors and windows were replaced. Significant building systems work also were completed with new plumbing, heating, electrical and fire protection systems being installed in the building which brought the building up to current building code standards with proper fire-separation, a sprinkler system, and a new fire alarm panel. The unit interior scope of work included upgrading kitchens with cabinets, countertops, sinks and faucets, and appliances, upgrading bathroom with new finishes and fixtures, and refurbishing other interior finishes including painting, flooring and shades.

As previously noted, work was completed in September 2021. The project was closed-out in 2022 and the $916,456 represents the final payments made to the contractor as part of the close-out.

Truman Apartments – Total Construction Contract of $25.6 million; $6,478,622 spent in 2022

This project began construction in February 2021, shortly after financial closing in December 2020 and once sufficient vacancies were available. The building was entirely vacant by March 2020 allowing for an accelerated construction period of approximately one year. Construction enabling work began on January 4, 2021, and construction was completed by end of March 2022.

The improvements completed at Truman Apartments included the expansion of the community room and laundry room, installation of a new ventilation system and central air conditioning, replacement of the roof and windows, re-cladding of the building, and addition of pathogen-safety features including increased efficiency air filters and UV treatment. In the 59 residential units and interior common areas, fixtures and floors were updated. Finally, additional spaces for the Truman community were created including a TV room, social worker's office, conference room, and computer lounge. In 2022, $6,478,622 of the $25.6 million in construction was completed.

Putnam School – Total Construction Contract of $12.55 million; $3,800,396 spent in 2022

In 2021, CHA secured private activity bonds from MassDevelopment to finance the modernization of the 33-unit Putnam School, a historic former school building that houses seniors and people with disabilities. CHA hired BH+A Architects to complete construction documents and publicly bid the project through M.G. L. Chapter 149. At the close of 2020, CHA completed a $21 million financial closing with Enterprise Community Partners as an investor and Silicon Valley Bank (previously known as Boston Private Bank and Trust) as the lender. Construction started immediately after the closing and will last until early Spring 2023.

The $12.55 million rehabilitation of Putnam School includes new heating, cooling and ventilation systems, new bathroom and kitchens, reconfiguration of the fourth-floor congregate units into independent units, and significant masonry improvements. Plans also include moving community space and the management office to the building's garden level freeing up space on the upper levels to allow for the addition of one additional unit to this current thirty-three-unit building.

In 2022, construction expenditures totaled $3,800,396.

116 Norfolk Street – Total Construction Contract of $32.5 million; $285,041 spent in 2022.

CHA secured private activity bonds from MassDevelopment to allow for it to close on $42 million financing of the renovations and new construction planned for 116 Norfolk. 116 Norfolk is a 37-unit SRO building with a concierge unit originally constructed in 1907. Design plans of the modernization of 116 Norfolk include adding new deeply affordable dwelling units, improving site accessibility, and upgrading interior common areas, and refurbishing unit interior areas. The existing building footprint covers only about 25% of the existing site, and so part of the design includes new construction in the form of an addition to the existing building to add additional affordable housing units. CHA is using available federal public housing subsidy through its Faircloth Authority to add these new units to its portfolio using available federal public housing authority which would convert to Faircloth to RAD as provided by the U.S. Department of Housing and Urban Development.

The project closed on its financing in December 2022 with construction starting in January 2023. The construction is expected to take 20 months with completion anticipated for the Fall 2024. In 2022, $285,041 was spent on pre-construction activities.

Major Construction Activity in 2022

The chart below summarizes the expenditure in 2022 by project.

Site	Units After Construc-tion	2022 Expen-diture	Status
Burns Apartments	198	$27,619,462	Construction started in Feb 2020 and was completed in August 2022
Millers River Apartments	300	$23,206,204	Construction started in January 2019 and was completed in July 2022.
78-80 Porter Road	26	$916,456	Completed in September 2021 with the project close-out occurring in 2022
Roosevelt Towers Low Rise	112	$13,454,916	Construction started in January 2020 and was completed in July 2022
Truman Apartments	59	$6,478,622	Construction started in January 2021 and was completed in March 2022
Putnam School	34	$3,800,396	Construction started in December 2022; to be completed in Spring 2023

116 Norfolk Street	62	$285,041	Construction starting in January 2023; to be completed in October 2024.
Total	791	$75,761,097	

Smaller Projects

The Planning and Development Department also oversees in smaller modernization and renovation projects in the portfolio. In 2022, funds were expended or bids received on the following projects:

Smaller Projects

Project Name	Contract Amount as Amended	Expenditures in 2022
Selective Modernization of 689 Housing on Aberdeen, Hammond and Woodbridge – COMPLETED/CLOSEOUT IN 2022	$1,273,400	$80,064
Jefferson Park State Exterior Repairs – Replacement of Damaged Railing Trim – COMPLETED	$388,400	$388,400
8-10 Lancaster Street Selective Modernization – Roof AND Masonry (Partial Payments) – CLOSEOUT IN 2022	$780,009	$54,148
L.B. Johnson Apartments – Ventilation Improvements – COMPLETED/CLOSEOUT IN 2022	$60,000	$60,000
Manning Apartments – Exterior Installation - Garage Gate Installation – COMPLETED/CLOSEOUT IN 2022	$48,750	$48,750
John F. Kennedy Apartments – Ventilation Improvements – COMPLETED/CLOSEOUT 2022	$49,000	$49,000
Willow Street Exterior Modernization – Siding Repairs and Full Repainting – WORK COMPLETED WITH PAYMENT IN 2022	$306,293	$306,293
Hingham St Exterior Modernization – Roof and window replace-ment, exterior improvements – TO BE COMPLETED IN 2023	$498,588	$61,750
45 Linnaean Street – Window System Replacement Project – WORK AWARDED IN 2022; TO BE COMPLETED IN 2023	$98,500	$0
15 Inman Street- Roof Replacement – WORK AWARDED in 2022; TO BE COMPLETED IN 2023	$195,890	$0
Jefferson Park State Bi-Directional Antenna Installation- WORK AWARDED IN 2022; TO BE COMPLETED IN 2023	$415,000	$0

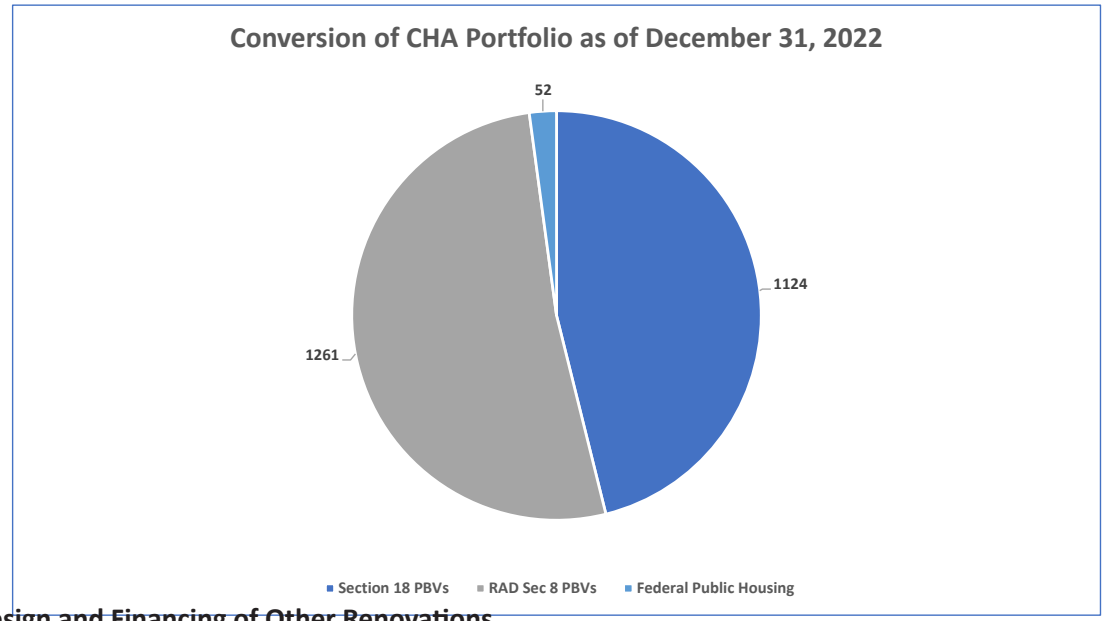
Washington Elms – Renovation of Fire Damage Unit – WORK AWARDED IN 2022; TO BE COMPLETED IN 2023	$367,000	$0
Lincoln Way – Deck Repairs - WORK AWARDED IN 2022; TO BE COMPLETED IN 2023	$21,000	$0
Putnam School – Fencing Upgrade – WORK IS IN DESIGN. Estimated Cost is $200,000	TBD	$0
Total	$4,501,830	$1,048,405

Conversion of Federal Public Housing to Project-Based Vouchers

In 2022, Cambridge Housing Authority completed a RAD/Section 18 blended transaction for 116 Norfolk, a 37-unit SRO building originally constructed in 1907.

116 Norfolk Street was one of four developments that remain federal public housing with CHA's portfolio. The other three properties being: 45 Linnaean Street, Clifton Apartments and the two small building adjacent to the Roosevelt Towers Mid-Rise. CHA plans to incorporate the two small buildings adjacent to the Roosevelt Tower Mid-Rise with the plans to renovate the Mid-Rise Building.

The chart below shows the status of CHA's portfolio. Of the original portfolio of 2,437, only 52 units remain as federal public housing.



Design and Financing of Other Renovations

In addition to the construction activity and federal repositioning applications, the Planning and Development department has been planning for upcoming renovations at numerous additional properties.

Design and Financing Projects

A brief update on these design and financing projects is provided below.

Jefferson Park Federal

In 2020, CHA requested and received an extension from HUD that extends the deadline to start construction at Jefferson Park Federal to August 2023. In addition, in 2020 the Cambridge Housing Authority received confirmation from MassHouing that the Jefferson Park project is in its queue for private activity bonds allowing CHA to move forward with securing the balance of the financing and completing the design work. Meetings with residents were restarted in December 2020 and continued throughout 2022 as the design and the permitting process progressed. CHA negotiated a relocation plan with residents, and started to relocation residents in anticipation of an early 2023 construction start. In January 2022 CHA selected an equity investor who will be providing close to $100 million in equity to the project.

Plans for the Jefferson Park site include replacing the obsolete existing buildings and infrastructure with all new construction. New construction will enable the CHA to provide more and higher-quality affordable apartments to current and future residents, and to create 103 additional units. In addition, it will allow CHA to restore to occupancy 57 units that were taken offline in 2018 and 2019 due to poor conditions. All apartments at Jefferson Park, whether replacement or new, will be deeply affordable, and supported by a project-based voucher. CHA is targeting closing on the financing in Spring 2023 with construction of the new buildings starting immediately thereafter.

Corcoran Park

In 2020, CHA also requested and received an extension from HUD extending the deadline to start construction at Corcoran Park to August 2023, and will be seeking a further extension given the scarcity of private activity bonds. The CHA is anticipating starting construction at Corcoran Park in in Fall 2024. It is anticipated that the modernization of Corcoran Park will be funded through a mixed finance package being developed by CHA with potential funding from tax-exempt bond financing, Low Income Housing Tax Credits, funds from CHA, and private debt amongst other resources. The site currently consists of 27 buildings; 24 of the buildings are composed of two-story townhouses, one building of eight one-bedroom flats, and two non-residential with the property management office and community room and maintenance storage. An existing conditions study and feasibility options have been completed. CHA is working with the project design team to finalize a feasibility design allowing it to move forward into the design phase, with plans to complete financial closing in Fall 2024 allowing construction to begin construction shortly thereafter. We are anticipating that it may be necessary to do Corcoran Park in phases.

Roosevelt Towers Mid-Rise/155 Willow Street

Roosevelt Towers Mid-Rise is an eight-story building that was modernized and converted to a Section 8 subsidized property in 1982. An Existing Conditions Study has been completed and revealed that the needs at the Mid-Rise are far more dire than previously anticipated. The needed scope of work for the Mid-Rise is extensive and will include sewer and storm water drainage improvements; replacement of underground water lines, masonry repairs; roof replacement, window replacement, accessibility upgrades, kitchen/bath modernization; HVAC improvements; and electrical, plumbing and fire protection upgrades. Additionally, given the extensive renovation needs of the Mid-Rise, there is an opportunity to add additional units to the building as part of any renovation project. The CHA will be looking to move forward with the Mid-Rise renovations as the construction on the low-rise units are completed.

In addition to the mid-Rise building, there is the possibility to build approximately twenty-five new (25) units at 155 Willow Street (Willow Street), the parking lot across the street from Roosevelt Towers. CHA will explore this opportunity once work on the Mid-Rise building is underway/complete.

65 Chilton Street

CHA has been evaluating the potential purchase of 65 Chilton Street which in the past has served as a small scale hospice facility for use as a community facility for developmentally disabled individuals. In addition to identifying potential service providers, CHA has been working to obtain state approval for the facility to serve as special needs housing. Despite having a full size elevator and emergency generator, the state agency is requiring handicapped accessible ramp access from the first floor. CHA is working with one of its house doctors to evaluate the potential for such a ramp given the constraints of the site. We expect to finalize that feasibility study in the first quarter of 2023, and hope it will allow us to move forward with the planned purchase and conversion.

Private Activity Bonds

In 2022, CHA closed on one additional private activity bond transactions: 116 Norfolk Street as discussed in the section above. For 2023, CHA is forecasting one additional project: Redevelopment of Jefferson Park Federal. CHA anticipates two additional private activity bond transactions in 2024. CHA's progress on these last two projects has been stymied by the high demand for Private Activity Bonds in Massachusetts

The chart below details the anticipated Private Activity Bond allocations over the next two years.

Private-Activity Bonds allocated or expected in 2022 and 2023

Property	Units	Year	Private Activity Bonds
Jefferson Park Federal	278.	2022	$116.00 million
Corcoran Park Phase 1	100 est.	2023	$45.00 million
Weaver Apartments	24 est.	2023	$10.00 million

Other Notable 2022 Accomplishments

In addition to the notable construction and planning achievements and accomplishments, the Planning and Development Department had other notable activities from acquiring the investor member's interest for one of CHA's first LIHTC deals to the expanding consultancy services being provided by the Department. Some of these other notable accomplishments include:

Purchase/Assignment of Investor Member Interest for Lyndon B. Johnson Apartments

CHA ended 2022 with the full ownership of Lyndon B. Johnson Apartments being transferred back to a 100% owned affiliated of the Cambridge Housing Authority as anticipated by its 2010 financing plan.

In 2010, using a $10 million grant award Lydon B. Johnson (LBJ) Apartments through the 2009 American Recovery and Reinvestment Act (ARRA), the CHA assembled the financing to complete a $32 million renovation of the property, a 177 unit, 12 story high-rise building serving elders and persons with disabilities. The financing, which included $26 million in equity provided through the federal LIHTC program, allowed for extensive renovations of LBJ Apartments including the upgrading of building systems including electrical, plumbing, heating, cooling and ventilation, installing of new windows, exterior cladding and insulation, and new roofing, modernizing apartment bathrooms and kitchens as well as community spaces. A key element of LBJ renovations was the substantial energy improvements and reductions achieved at the property. CHA was able to reduce energy costs at LBJ Apartments by over 55% while adding central air condition to the building.

In mid-2022, CHA reached out the project's investor to determine if they would be interested in transferring their ownership interest to a CHA affiliate since

they had received all their anticipated economic benefits earlier than anticipated due to the changes to the tax code adopted in December 2017. The firm was agreeable allowing the transfer of the ownership interest to occur in late December at a normal cost (under $10,000). If CHA had not been proactive, the cost to acquire the interest could have been higher in future years as CHA would have been liable for a tax penalty due to the tax code changes.

Purchase of Solar Power Panel Arrays

Also in 2022, CHA agreed to purchase the existing roof top solar installations at Washington Elms, Jefferson Park, Lincoln Way and LBJ Apartments for $403,000. These arrays were installed by Blue Hub Capital through power purchase agreements. Under the terms of the power purchase agreements, Blue Hub Capital provided the capital costs of installing the solar arrays allowing CHA to benefit from the solar power production and emission reductions at the four sites. The purchasing of the panels is projected to save CHA $558,000. Further, the income derived from the sale of the solar power to the properties while at significantly reduced rate will help CHA fund future solar panel installation or other energy conservation measures. CHA created CHA Solar LLC as the entity that holds ownership of the panels. The actual purchase of the panels was completed in January 2023.

Outside Consultancy Services

CHA's outside consultancy services continue to grow in scale and accomplishment in 2022. During 2022, CHA worked with nine housing authorities. Some of the major accomplishments have been:

Medford: Secured a $15 million grant for the Medford Housing Authority from the Commonwealth of Masschusetts' Department of Housing and Community Development to redevelop a 144-unit state public housing development. Assisted in hiring an A/E firm for that project which includes the replacement of the 144-units and the addition of 98 additional units. On a second project, CHA assisted in the hiring of a Construction Manager for a $100 million rehabilitation of a 200-unit, high-rise development, and in finalizing the scope of the rehabilitation work. CHA is serving as a Co-Developer and Owner's Project Manager on the project which is scheduled to close on its financing and begin construction in February 2023. CHA also secured the equity and debt financing for the second project.

Brockton: Assisted in hiring a Construction Manager for a 398-unit redevelopment of an existing federal public housing development. CHA previously assisted Brockton in securing a Section 18 disposition of the development due to its extensive physical conditions needs. The redevelopment's scope of work includes construction new units to replace obsolete, poor quality units. CHA is assisting Brockton Housing Authority in the design and financing of the project. We are currently targeting early 2024 for construction to begin.

Needham: Assisted in hiring an A/E firm to complete a master plan for the redevelopment of a 152-unit state public housing development. CHA is also finalizing its recommendations on the repositioning of Needham's federal public housing program which will allow the housing authority to move forward with some much needed, deferred capital work. These additional resources will assist each of these housing authorities either with the renovation of their developments, or in the case of the smaller transaction with additional revenue to allow the housing authority to further its mission. We also assisted in the preparation of several successful applications for local Community Preservation Act funding.

Belmont: Worked on two feasibility studies for the Belmont Housing Authority. One involved the redevelopment of an 80-unit state elderly public housing development, and the other involved the redevelopment of a 100-unit state family public housing development. The draft feasibility report was submitted for the elderly development in January 2023. We are looking at a spring deliverable for the family development's feasibility study. We also assisted in the preparation of a successful application for local Community Preservation Act funding.

Lewiston ME: Assisted in the feasibility and preliminary design of a RAD conversion including submission of a funding application to MaineHousing. CHA also worked on existing conditions reviews at two other Lewiston ME Housing Authority properties as well as assessing the development potential of numerous sites and the acquisition of a 128 unit Section 8 Moderate Rehabilitation assisted property.

Watertown: Assisted in design and funding applications related to the construction of a new five -bedroom Special Needs Housing home in East Watertown. While the applications were not successful in 2022, new applications are being prepared in 2023. We have also provided some technical oversight of a feasibility study related to the redevelopment of a state public housing family site also in East Watertown.

Sudbury: Assisting in the assessment of the potential purchase of a parcel of land that is constrained by wetlands as well as endangered wildlife species. Additionally, we are looking at a second site to see if there may be a development opportunity as well as determining if some housing authority owned single family dwellings could be efficiently and cost effectively replaced by new duplexes.

Haverhill: Assisting in the assessment of the potential development of new housing on a 1-acre parcel owned by Haverhill Housing Authority. Additionally, we have identified and assessing another potential development opportunity on housing authority land as well as other development opportunities identified by the housing authority. We provided some technical assistance and support on their recent acquisition of a four-unit dwelling.

Housing and Health

In 2022, the CHA received an award from the City of Cambridge for $750,000 in grants from the State & Local Coronavirus Fiscal Recovery Funding, commonly referred to as ARPA (American Rescue Plan) funds, to support a robust meals program at the CHA's largest elderly communities: LBJ (177 households), Manning (205 households), Burns (198 households), Millers River (300 households). The goal is for the CHA to hire chefs for each location who will work to supply fresh, quality, and healthy meals to up to 880 residents daily. Additionally, this program creates the foundation to provide meals for the properties surrounding these three developments, such as family properties like Woodrow Wilson Court (69 households), Putnam Gardens (122 households), and Roosevelt Towers (199 households), ensuring food security for hundreds of low-income families as well. The food program will also assist in countering the isolation that many elders experience which has been exacerbated through the pandemic. CHA has had an existing program at John F. Kennedy Apartments which enhances the social atmosphere and mental wellness with healthy food. Furthermore, the meals program will create the opportunity to offer cooking classes for residents in order to provide in-house programming and opportunities for connection between residents to help combat isolation exacerbated by the pandemic. The pandemic imposed a financial burden on older adults. Job loss and savings depletion resulted in significant economic impacts that led to both immediate and delayed harms towards the targeted group. Early pandemic data suggested that 13.5% of older adults were food insecure, a staggering 60% increase from pre-pandemic levels. Heightened health concerns coupled with financial strain made it difficult for this group to access essential resources. Food insecurity among this group is particularly concerning, as many older adults require special diets to maintain their health. Senior food programs like Meals on Wheels took on new clients during the pandemic, and 82% of their local programming reported that these clients were there to stay moving forward. With these negative economic strains showing no signs of slowing down, it is crucial that we implement long-term meal solutions as we transition into the post-pandemic world. In 2023, the CHA will focus the ARPA award on Millers River in order to pilot the program before potentially expanding it to the other three sites.

In addition, as mentioned above, the CHA closed on financing on 116 Norfolk Street in 2022. 116 Norfolk is the CHA's first permanent supportive housing development to support individuals transitioning out of homelessness. At 116 Norfolk, Cambridge Housing Authority is partnering with Eliot Community Human Services, who will be providing a minimum of 4 full-time case managers. CHA is including an office and conference room for service providers on the site. Each case manager will work on-site at 116 Norfolk 40 hours per week. Eliot will also provide Recovery Coaches and in-house psychiatric support as needed, as well as referral to other providers of physical and mental healthcare. Though case managers will not be onsite 24/7, they will have a staggered schedule to ensure more than 40 hours a week of case manager presence on site. For overnight coverage, the CHA will provide overnight security 7 nights per week. Eliot Community Human Services will be training the security staff with a 6-part trauma-informed response training they developed. Eliot also provides a 24/7 behavioral health hotline. Eliot Community Human Services is a well-respected social services organization founded in 1957. They are considered experts in the Greater Boston area for the quality of their service provision and work pioneering the Community Support Program for People Experiencing Homelessness, a MassHealth reimbursable product that provides services dollars for people exiting homelessness. Eliot is considered a

leader at navigating MassHealth, Medicaid, and other insurance reimbursement programs and accessing local, state and federal funds available to provide robust social services. CHA selected them after issuing a Request for Services in early 2021, contacting references including Cambridge's Department of Human Services Programs and conducting a thorough interview process. Eliot is experienced in working with clients exiting homelessness, providing them with wraparound services including case management and Recovery Coaching where needed. 116 Norfolk is expected to lease up in late 2024.

ENERGY AND SUSTAINABILITY

2022 was an exciting year for CHA's energy and sustainability program. Construction was completed at six properties; Burns Apartments, Millers River Apartments, Roosevelt Towers family units, and Truman Apartments. These 698 units will all be certified under the Enterprise Green Communities Program assuring that CHA residents are living in homes that are healthier and more comfortable to live in than their prior units.

The work at the high/mid rise buildings, Burns, Millers River and Truman apartments included high efficiency air conditioning systems for both the common areas and unit apartments, providing a higher level of comfort during the Cambridge area's steadily increasing summer temperatures. All of these units including those at Roosevelt Towers now include direct fresh air ventilation via high efficiency energy or heat recovery units, providing improved indoor air quality for residents.

Energy metrics and reporting are somewhat in flux with so many units in modernization, having various percentages of units vacant during construction efforts also consumes power and water at the buildings. However, what data we have in hand is quite promising. In terms of Energy Star scores, Burns Apartments has increased from an existing score of 42 to 84, despite only a partial year of solar and one month of cogeneration performance. The building was completely re-clad, with augmented insulation and air sealing, measures which are clearly effective at increased comfort and a higher level of building performance. Similarly, Millers River has increased from an Energy Score of 17 to a 64 despite the Tri-gen plant becoming operational only late in 2022.

For some of CHA's buildings, energy use has increased slightly both from higher numbers of residents staying home and additional measures that CHA has taken to improve ventilation rates. CHA increased air flow in the building ventilation systems, installed UV lights in ERV and fan coil units, and provided stationary air cleaners at elevator lobbies and other public areas. Full energy data for 2022 will be available for reporting in mid-March when the utility company releases aggregate reporting for individual units to create whole building reporting for CHA's family sites. To date CHA has achieved a 35% reduction in green house gas emissions since the baseline year of 2010 and has saved over $3 million annually in avoided utility cost.

This year's modernization efforts also added to CHA's on-site electricity generation, with three cogeneration units totaling 275 kW coming online at the end of 2022. This additional onsite capacity lessens demand on the utility grid and provides additional emissions reduction for CHA's portfolio. As mentioned in the Planning and Development section of this report, late in 2022, CHA also created a new entity, CHA Solar LLC. CHA solar has purchased roof top arrays that were previously owned by Blue Hub Capital, an arrangement which benefits CHA economically and will continue to increase emissions reductions across our portfolio.

As CHA continues to move toward electrification of the portfolio, energy reporting is transitioning from the conservation focus of the past to a focus on decarbonization. CHA's next round of construction at Putnam School, 116 Norfolk Street, and Jefferson Park are increasingly reliant on electricity as the major energy source. The 278 unit Jefferson Park redevelopment will be CHA's first Passive House certified project, leading the way for future developments.

VOLUNTARY COMPLIANCE AGREEMENT

CHA has fulfilled the terms of its Voluntary Compliance Agreement with HUD's Office of Fair Housing and Equal Opportunity. Construction of the final five (5) required units to meet the requirement to create 42 additional wheelchair accessible units were completed in September 2021 as part of the Revitalization of Millers River.

VCA COMPLIANCE – SUMMARY

PLANNED UNITS	COMPLETED UNITS	PLANNED DATE	COMPLETED DATE	STATUS
2	2		03 / 2008	Units completed at Lyndon B. Johnson Apartments
5	5		12 / 2008	Units completed at Frank J. Manning Apartments
5	5		05 / 2010	Units completed at Frank J. Manning Apartments
1	1		03 / 2010	Unit completed at Willow Street Homes
3	3		11 / 2011	Units completed at Jackson Gardens
1	1		02 / 2012	Unit completed at Lyndon B. Johnson Apartments
4	4		03 / 2012	Units completed at Lyndon B. Johnson Apartments
4	4		08 / 2013	Units completed at Lincoln Way
2	2		12 / 2015	Units completed at 5 Temple Place[1]
8	8		07 / 2018	Units completed at Jefferson Park
2	2		07 / 2018	Units completed at Manning Apartments
5	5		09 /2021	Units planned for Millers River Apartments
42	**42**			**TOTAL**

1. Temple Place is new units to CHA's inventory. A total of four (4) accessible units were created- 2 of the 4 count towards the 5% required of new construction. The additional two (2) count towards the VCA.

FY22 RESIDENT PROGRAMS + SERVICES

PROGRAM	HHS SERVED	FY HIGHLIGHTS AND UPDATES	OPTIMAL CAPACITY (YEAR)
EARLY CHILDHOOD			
Baby U	32 Families	32 participants	40 Families
Baby U Alumni Association	200 and growing Families	20 trainings/event completed annually.	200 Families and growing
Pathways to Family Success	16 Families	Literacy program for families with ESL children K-3 with wraparound services for parents.	15-18 Families
YOUTH			
DREAM Mentoring	10 Youth	10 youth paired with Harvard mentors for academic year.	15 Youth school yr 30 Youth summer
Work Force	325 Youth	325 students served annually, including post-secondary coaching for persistence for 125 alumni annually (matriculated graduates over previous four classes); 75% of 2016 class expected to complete post-secondary degrees in five years	325 Youth
Work Force College Savings Program	120 banked	Average savings of ~$30,000 per class.	200 Youth
Work Force Middle School Program	40 Youth	After-school enrichment program offered at Cambridge St. Upper School for 20 6th graders and 20 7th graders.	40 youth
Tutoring Plus, Inc	32 Youth	32 tutoring matches	50 Youth
This Way ONward	75 Youth	16 weeks for training workshops. 40 internships.	75 Youth - 40 summer internships

PROGRAM	HHS SERVED	FY HIGHLIGHTS AND UPDATES	OPTIMAL CAPACITY (YEAR)
Big Brother Big Sister Program	125 Youth	Goal of 125 matches was met	125 Youth
Youthbuild	4 Youth	Earn GED while building affordable housing	4-6 Youth
ADULT			
Bridge-to-College Program	4 Adults	Majority of graduates enroll at Bunker Hill Community College.	10 Adults
Community Computer Centers	200 Youth 180 Adults		200 Youth 180 Adults
Cambridge Employment Program	95 Adults	30 job placements in an academic year.	95 Adults
Jefferson Park Gateways Learning Program	141 Adults	6 classes/academic year and 3 classes/summer	140 Adults
Just-A-Start Biomedical Careers	4 Adults	Academic year program that prepare participants for entry level positions.	8 Adults
Financial Stability and Savings (FSS+)/Rent-to-Save	192 HCV 321 RTS	See SS.2013.01- FSS activity in Approved MTW Activities section for more information.	200+ Adults
Pathways to Permanent Housing - Heading Home	24 Adults	See HC.2008.03B - Sponsor-Based Voucher Program in Approved MTW Activities section for more information.	45 Adults
Pathways to Permanent Housing - Transition House	3 Families	See HC.2008.03A - Sponsor-Based Voucher Program in Approved MTW Activities section for more information.	4 Families
AGING IN PLACE			
Elder Service Coordinators Services (formerly contracted through CASCAP, Inc.)	640 Elderly Adults	Ongoing group activities involving Farmer's Market, healthy eating, emotional support, informational sessions, coffee hours, birthday parties, lunch outings and shopping trips. Available to any elderly non-PACE adult living in CHA unit.	1,035 Elderly Adults
PACE Elder Service Plan	36 Elderly Adults	Program includes 20 units at LBJ and 16 at Millers River.	36 Elderly Adults
TOTAL[3]	**553 Youth 1,270 Adults 676 Elderly**		

HOUSING INVENTORY

	HUD Baseline	Vouchers Authorized or PH Units in Place on 12/31/2022[1]	Total Households on 12/31/2022	HH Demo graphics	MTW Local Non Tradi-tional	MTW Family and Bedroom size	Notes
Public Housing Elderly/Disabled		40	37	37			Linnean (20), Weaver (20)
Public Housing Family		12	8	8			Roosevelt Towers (12)
RAD Elderly/Disabled		448	436	436	0	419	Manning Apartments (198), LBJ Apartments (177), JFK Apartments (44 RAD) , 116 Norfolk St (29)
RAD Family		834	827	827		827	Washington Elms (175), Newtowne Court (268), Putnam Gardens (122), Woodrow Wilson Court (68), Lincoln Way (53 RAD) Jackson Gardens (45) River Howard and Willow St (46 RAD), Cambridge Port Commons (10), Fairmont St (10), Garfield St (6), Saint Paul (15 RAD), 121 Jackson Street (10), Valentine Street (6)
Former Public Housing Elderly/ Disabled		660	546	546		615	Millers River (297), Burns (198) Russell (51), Truman (59) , 116 Norfolk (8), Saint Paul (5), Elderly Condos (5)
Former Public Housing Family		572	393	393		443	Corcoran Park (153), Jackson Place Apartments Interim Holding LLC (173), Roosevelt Towers (112) and Jefferson Park Apartments (104) Garfield (2), Family Condos + Scattered Sites (28)
MTW HARD UNITS	**854**	**2,529**	**2,224**	**2,224**			**89 % Occupancy.** Occupancy affected by RAD conversion and Section 18 Disposition.
MTW Tenant Based			4,180	4,339	0	4,339	All MTW Vouchers
MTW Project Based + Expiring Use							Count is exclusive of enhanced non-project based voucher. Count includes expiring use projects

1 Note: Unit counts match units in program. For example, Lincoln Way has 17 project-based vouchers that are included under Section 8 and not included here. That explains discrepancies in both household count and count of actual physical units.

	HUD Baseline	Vouchers Authorized or PH Units in Place on 12/31/2022[1]	Total Households on 12/31/2022	HH Demo graphics	MTW Local Non Tradi-tional	MTW Family and Bedroom size	Notes
Sponsor-based/ Local Non-Traditional		134	225	N/A		N/A	This count represents individual households served by the program. A voucher can, and often does, serve more than one household.
MTW VOUCHERS	**5,304**	**4,314**	**4,564**			**106%**	**Utilization Rate.**
Federal Non-MTW		821	718	718	N/A	N/A	Voucher allocation includes Mainstream, VASH, DHVP/NED, Mod Rehab , Emergency Housing Vouchers, and Shelter + Care.
ALL FEDERAL VOUCHERS		5,135	5,282	N/A	N/A	N/A	Does not include relocation or RAD/FPLI
ALL FEDERAL ASSISTED		**7,664**	**7,506**				**98% utilization. Includes hard units (PH, RAD, FPLI) + vouchers.**
State New Construction		110	74	74	N/A	N/A	Includes Roosevelt Towers (Mid-Rise) and Putnam School.
State and Local Vouchers		142	131	131	N/A	N/A	Voucher funding includes MRVP , AHVP, Shelter Care .
STATE AND LOCAL ASSISTED		**252**	**205**			**81%**	**Utilization**
TOTAL ASSISTED		**7,916**	**7,711**			**97%**	**Utilization**

HOUSEHOLD DEMOGRAPHICS

MTW HARD UNITS AND VOUCHERS

HOUSEHOLDS SERVED - DECEMBER 31, 2022

	HARD UNITS								MTW HCV HOUSEHOLDS		
	PUBLIC HOUSING FAMILY	PUBLIC HOUSING ELDERLY	RAD FAMILY	RAD ELDERLY	FORMER PUBLIC FAMILY	FORMER PUBLIC ELDERLY	TOTAL	PERCENT	HOUSE HOLDS	PERCENT	TOTAL
UNIT SIZE											
0 BR	0	22	0	79	0	7	108	5%	204	5%	312
1 BR	0	15	160	345	48	536	1,104	52%	1,839	42%	2,943
2 BR	8	0	360	12	178	3	553	25%	1,519	35%	2,079
3 BR	0	0	241	0	127	0	368	17%	651	15%	1,027
4+ BR	0	0	66	0	17	0	83	4%	126	3%	209
TOTAL HOUSEHOLDS	8	37	827	436	370	546	2,224	100%	4,339	100%	6,563
RACE											
American Indian	0	0	3	1	1	2	7	0%	17	0%	24
Asian	0	0	54	33	24	26	137	6%	552	13%	689
White	5	24	239	226	113	315	922	41%	1,863	43%	2,785
Black/African American	3	13	526	167	227	198	1,134	51%	1,895	44%	3,029
Native Hawaiian/Other Pacific	0	0	5	6	1	5	17	1%	12	0%	29
TOTAL HOUSEHOLDS	8	37	827	436	370	546	2,224	100%	4,339	100%	6,563
ETHNICITY											
Hispanic	2	1	133	32	55	59	282	13%	820	19%	1,102
Non-Hispanic	6	36	694	404	315	487	1,942	87%	3,519	81%	5,461
TOTAL HOUSEHOLDS	8	37	827	436	370	546	2,224	100%	4,339	100%	6,563
INCOME[2]											
At 30 AMI or below	4	30	577	396	233	484	1,724	78%	3,372	78%	5,096
Over 30 AMI – 50 AMI	4	7	170	36	91	53	361	16%	689	16%	1,050
Over 50 AMI – 60 AMI	0	0	24	3	17	7	51	2%	147	3%	198
Over 60 AMI – 80 AMI	0	0	32	1	9	1	43	2%	108	2%	151
Over 80 AMI	0	0	24	0	20	1	45	2%	23	1%	68
TOTAL HOUSEHOLDS	8	37	828	436	370	546	2,224	100%	4,339	100%	6,563
CAMBRIDGE RESIDENT											
Cambridge	8	37	827	436	370	546	2,224	100%	2,377	55%	4,601
Outside Cambridge	0	0	0	0	0	0	0	0%	1,962	45%	1,962
TOTAL HOUSEHOLDS	8	37	827	436	370	546	2,224	100%	4,339	100%	6,563

1. 0 BR vouchers include studios and single room occupancy (SROs).
2. HUD area median income (AMI)- Income Limits Data may be accessed at http://www.huduser.org/portal/home.html.

FEDERAL NON-MTW, NEW CONSTRUCTION AND STATE
HOUSEHOLDS SERVED - DECEMBER 31, 2022

	NEW CONSTRUCTION		FEDERAL NON-MTW		STATE		
	HOUSEHOLDS	PERCENT	HOUSEHOLDS	PERCENT	HOUSEHOLDS	PERCENT	TOTAL
UNIT SIZE							
0 BR	3	4%	138	19%	60	46%	201
1 BR	59	80%	428	60%	35	27%	522
2 BR	12	16%	115	16%	19	15%	146
3 BR	0	0%	25	3%	16	12%	41
4+ BR	0	0%	12	2%	1	1%	13
TOTAL HOUSEHOLDS	74	100%	718	100%	131	100%	923
RACE							
American Indian	0	0%	12	2%	1	1%	13
Asian	3	4%	9	1%	4	3%	16
White	37	50%	406	57%	64	49%	507
Black/African American	34	46%	290	40%	62	47%	386
Native Hawaiian/Other Pacific	0	0%	0	0%	0	0%	0
TOTAL HOUSEHOLDS	74	100%	718	100%	131	100%	923
ETHNICITY							
Hispanic	8	11%	85	12%	18	16%	111
Non-Hispanic	66	89%	633	88%	105	84%	802
TOTAL HOUSEHOLDS	74	100%	718	100%	131	100%	923
INCOME[2]							
At 30 AMI or below	57	77%	605	84%	109	83%	771
Over 30 AMI – 50 AMI	11	15%	90	13%	16	12%	117
Over 50 AMI – 60 AMI	3	5%	16	2%	0	2%	19
Over 60 AMI – 80 AMI	1	1%	6	1%	4	3%	11
Over 80 AMI	2	3%	1	0%	2	2%	5
TOTAL HOUSEHOLDS	74	100%	718	100%	131	100%	923
CAMBRIDGE RESIDENT							
Cambridge	74	100%	327	46%	119	91%	520
Outside Cambridge	0	0%	391	55%	12	9%	403
TOTAL HOUSEHOLDS	74	100%	718	100%	131	100%	923

1. New Construction totals have been collapsed as one category that include both family and elderly units. There are only 2 family units and the remainder are elderly units.
2. 0 BR vouchers include studios and single room occupancy (SROs).
3. HUD area median income (AMI)- Income Limits Data may be accessed at http://www.huduser.org/portal/home.html.

CHA HOUSING UNITS: YOUNGER DISABLED RESIDENT COMPOSITION –

	Units Available	Units Occupied	Younger Disabled Households	Percent of Units Available	Percent of Occupied Units
D.F Burns Apartments	199	108	4	2.0%	3.7%
Elderly Condos	5	4	1	20.0%	20.0%
J.F. Kennedy	44	44	4	9.1%	9.3%
Linnaean Street	24	20	4	16.7%	22.2%
L.B. Johnson Apartments	178	173	14	7.9%	8.3%
F.J. Manning Apartments	205	201	27	13.2%	13.4%
Millers River Apartments	301	215	28	9.0%	12.6%
R.C. Weaver Apartments	20	20	7	35.0%	35.0%
Roosevelt Midrise	77	77	17	22.1%	22.4%
Saint Paul Residence	21	21	9	42.9%	42.9%
L.J. Russell Apartments	52	51	5	9.6%	10.0%
GRAND TOTAL	**1,259**	**940**	**120**	**9.5%**	**12.8%**

WAITLIST INFORMATION

The following is a breakdown of CHA's waitlists. Under the Program column, CHA Units include public housing, RAD, and former public housing sites. Please note that an applicant may be eligible for multiple programs based on age and income. At fiscal year end, there were 22,188 distinct applicants that generated 178,103 applications or an average of over 8 applications per applicant.

CHA WAITLIST INFORMATION - DECEMBER 31, 2022

DISTINCT APPLICANTS	PROGRAM	DISTINCT APPLICANTS BY PROGRAM	UNIT TYPE	DISTINCT APPLICANTS BY UNIT TYPE	TOTAL APPLICATIONS
	CHA Units Elderly/Disabled	1,987	Elderly/Disabled	4,494	
	CHA Units Family	9,681	Family	24,849	
	HCV Elderly/Disabled	2,507	Single Room Occupancy (SRO)	1,630	
20,918	HCV Family	15,168			**178,103**
	Single Room Occupancy (SRO)	1,630			
	Total	30,973	Total	30,973	

CHA WAITLISTS BY - DISTINCT APPLICANTS IN EACH PROGRAM GROUP – BY RACE AND ETHNICITY – DECEMBER 31, 2022

	AMERICAN INDIAN/ ALASKA NATIVE		ASIAN		BLACK/ AFRICAN AMERICAN		NATIVE HAWAIIAN/ OTHER PACIFIC ISLANDER		WHITE		NOT IDENTIFIED[1]		HISPANIC		NON-HISPANIC		NOT IDENTIFIED[1]		TOTAL
CHA UNITS ELDERLY/DISABLED	34	2%	182	9%	683	34%	24	1%	1,043	52%	21	1%	278	14%	1,703	86%	6	0%	1,987
CHA UNITS FAMILY	139	1%	535	6%	5,098	53%	161	2%	3,392	35%	356	4%	2,623	27%	6,789	70%	267	3%	9,681
HCV ELDERLY/DISABLED	58	2%	145	6%	941	38%	32	1%	1,310	52%	21	1%	429	17%	2,074	8%	4	0%	2,507
HCV FAMILY	262	2%	589	4%	8,817	58%	308	2%	5,034	33%	157	1%	3,397	26%	11,228	74%	4	0%	15,168
SINGLE ROOM OCCUPANCY (SRO)	38	2%	53	3%	846	52%	42	3%	632	39%	19	1%	315	19%	1,311	80%	4	0%	1,630
TOTAL	**531**	**2%**	**1,504**	**5%**	**16,385**	**53%**	**567**	**2%**	**11,411**	**37%**	**574**	**2%**	**7,582**	**24%**	**23,105**	**75%**	**287**	**1%**	**30,973**

1. Count of waitlist applicants that did not indicate race or ethnicity on their applications.

CHA WAITLISTS BY - DISTINCT APPLICANTS IN EACH PROGRAM GROUP – BY INCOME – DECEMBER 31, 2022

	$0[1]		AT 30 AMI OR LESS		OVER 30 AMI - AT 50 AMI		OVER 50 AMI - AT 60 AMI		OVER 60 AMI - AT 80 AMI		OVER 80 AMI		TOTAL
CHA UNITS ELDERLY/DISABLED[2]	199	10%	1,544	78%	196	10%	19	1%	18	1%	11	1%	1,987
CHA UNITS FAMILY[2]	1,210	12%	6,694	69%	1,438	15%	177	2%	105	1%	57	1%	9,681
HCV ELDERLY/DISABLED	236	9%	2,091	83%	156	6%	12	0%	8	0%	5	0%	2,507
HCV FAMILY	1,368	8%	11,427	75%	2,126	14%	130	1%	74	0%	43	0%	15,168
SINGLE ROOM OCCUPANCY (SRO)	335	21%	1,002	61%	243	15%	26	2%	14	1%	10	1%	1,630
TOTAL	**3,347**	**11%**	**22,758**	**73%**	**4,159**	**13%**	**364**	**1%**	**219**	**1%**	**126**	**0%**	**30,973**

1. Count of waitlist applicants that indicated they had no income on their applications. Applicants have not yet been prescreened to determine actual income.
2. Report separates out by program (RAD, FPLI, LIPH) which now creates duplicate households. This count will not match the other tables.

The following provides a 10-year overview of CHA waitlist numbers. Program groups have been adjusted to reflect new program groupings resulting from the opening of the HCV waitlist in 2017. Numbers populated for FY13-FY16 are for federal public housing only. Total numbers for FY13 to FY16 do not add up because prior program categories such as state public housing and "other" have been removed.

CHA WAITLISTS BY - DISTINCT APPLICANTS IN EACH PROGRAM GROUP – BY UNIT SIZE – DECEMBER 31, 2022

	FY13	FY14	FY15	FY16[1]	FY17	FY18	FY19	FY20	FY21	FY22
CHA FAMILY										
1 BR	420	399	390	316	284	1,396	2,014	2,423	2,903	3,098
2 BR	2,525	2,676	3,693	2,569	2,298	2,612	3,079	3,431	3,714	3,586
3 BR	1,372	1,379	1,785	1,214	1,199	1,625	1,886	1,969	2,109	2,138
4+ BR	272	278	249	213	208	591	699	740	809	859
SUBTOTAL	4,589	4,732	6,084	4,312	3,989	6,224	7,678	8,563	9,535	9,681
CHA ELDERLY/DISABLED										
Studio or 1 BR	2,541	2,980	2,787	2,151	1,410	2,178	2,572	2,870	3,234	1,864
2 BR	94	114	154	106	81	173	220	259	299	123
SUBTOTAL	2,635	3,094	2,921	2,045	1,491	2,351	2,792	3,129	3,535	1,987
HCV ELDERLY/										
Studio or 1 BR					1,837	2,414	2,569	2,654	2,781	2,507
2 BR	N/A									
SUBTOTAL					1,837	2,414	2,569	2,654	2,781	2,507
HCV FAMILY										
Studio or 1 BR					5,982	7,546	8,081	8,564	8,925	9,479
2 BR					2,559	3,426	3,651	3,688	3,550	3,629
3 BR					979	1,390	1,558	1,564	1,548	1,532
4 BR					236	326	424	448	476	528
SUBTOTAL					9,756	12,724	13,714	14,264	14,499	15,168
SINGLE ROOM										
SRO					1,817	2,488		955	1,218	1,630

SOURCES + USES OF FUNDING

	Federal Public Housing	MTW Housing Choice Vouchers	Preservation Programs	NED/VASH	EHV	Capital Fund	Total MTW Funds
Sources							
Operating Receipts	$ 591,878	$ 278,560					**$ 870,438**
Subsidy Earned	$ 4,791,405	$ 137,492,922	$ 4,045,375	$ 3,901,653	$ 1,430,404	$ 3,423,159	**$ 155,084,918**
Administrative Fees		$ 11,830,301	$ 220,090	$ 329,095	$ 121,105		**$ 12,500,591**
Total Sources	**$ 5,383,283**	**$ 149,601,783**	**$ 4,265,465**	**$ 4,230,748**	**$ 1,551,509**	**$ 3,423,159**	**$ 168,455,948**
Uses							
Administrative Salaries and Benefits	$ 188,510	$ 2,137,940	$ 89,652	$ 100,305	$ 121,772	$ 559,302	**$ 3,197,480**
Maintenance Labor and Benefits	$ 141,653						**$ 141,653**
Resident Services	$ 16,193	$ 356,856					**$ 373,049**
Materials & Supplies, Contract Costs	$ 252,566						**$ 252,566**
General Expenses	$ 171,255	$ 3,471,754	$ 92,615	$ 195,268	$ 69,804		**$ 4,000,697**
Housing Assistance Payments		$ 106,781,526	$ 4,045,375	$ 3,901,653	$ 1,430,404		**$ 116,158,958**
Utilities	$ 228,697						**$ 228,697**
Capital Expenditures	$ -					$ 2,863,857	**$ 2,863,857**
Transfers for Program Loans		$ 16,301,319					**$ 16,301,319**
Total Uses	**$ 998,874**	**$ 129,049,395**	**$ 4,227,643**	**$ 4,197,226**	**$ 1,621,980**	**$ 3,423,159**	**$ 143,518,276**
Net Surplus (Deficit)	**$ 4,384,410**	**$ 20,552,388**	**$ 37,822**	**$ 33,523**	**$ (70,470)**	**$ -**	**$ 24,937,671**
HUD ARF funding	$ 692,946			$ -	$ -		**$ 692,946**
Other transfers	$ (43,095)	$ (2,750,000)			$ 70,470		**$ (2,722,625)**
Obligated funds on future comittments	$ (4,324,000)	$ (15,000,000)					**$ (19,324,000)**
Net Surplus (Deficit)	**$ 710,260**	**$ 2,802,388**	**$ 37,822**	**$ 33,523**	**$ (0)**	**$ -**	**$ 3,583,992**

OTHER FEDERAL FUNDS - FY22

Other Federal Programs consists of federal non-MTW voucher programs.

	Mainstream	Mod Rehab and Shelter Care	Total Other Federal Funds Budget
Sources			
Subsidy Earned	$ 5,435,283	$ 905,073	$ 6,340,356
Administrative Fees	$ 436,162	$ 148,309	$ 584,471
Total Sources	**$ 5,871,445**	**$ 1,053,382**	**$ 6,924,827**
Uses			
Administrative	$ 459,794	$ 121,145	$ 580,939
Housing Assistance Payments	$ 5,435,283	$ 905,073	$ 6,340,356
Total Uses	**$ 5,895,077**	**$ 1,026,218**	**$ 6,921,295**
Net Surplus (Deficit)	**$ (23,632)**	**$ 27,164**	**$ 3,532**

STATE FUNDS - FY22

The State funds represent both HCV funds (MRVP) and public housing sites which are split between the Massachusetts Rental Voucher Program (MRVP) and hard units funded under the State's programs.

	State Leasing Program	State Public Housing	Total State Funds
Sources			
Operating Receipts	$ -	$ 627,276	$ 627,276
Subsidy Earned	$ 1,283,590	$ 1,902,045	$ 3,185,635
Administrative Fees	$ 65,000	$ -	$ 65,000
Total Sources	**$ 1,348,590**	**$ 2,529,320**	**$ 3,877,910**
Uses			
Administrative	$ 164,061	$ 265,688	$ 429,749
Tenant Services	$ -	$ 151,012	$ 151,012
Maintenance Labor	$ -	$ 157,989	$ 157,989
Materials/Supplies, Contract Costs	$ -	$ 216,721	$ 216,721
General Expenses		$ 164,536	$ 164,536
Housing Assistance Payments	$ 1,283,590	$ -	$ 1,283,590
Utilities	$ -	$ 255,242	$ 255,242
Total Uses	**$ 1,447,651**	**$ 1,211,188**	**$ 2,658,838**
Net Surplus (Deficit)	**$ (99,061)**	**$ 1,318,133**	**$ 1,219,072**
MTW Block Grant transfers	$ 99,061	$ -	$ 99,061
Net Surplus (Deficit)	**$ -**	**$ 1,318,133**	**$ 1,318,133**

NON-FEDERAL FUNDS - FY22

	CY 2022
Beginning Fund Balance-1/1/2022	**$ 19,862,501**
Sources	
Leased housing anciallary fee income	$ 5,969
Non-dwelling rent	$ 24,000
Consulting Agreements - P&D	$ 725,861
Management Agreements	$ 696,831
Total Sources	**$ 1,452,661**
Uses	
Administrative Salary costs	$ 294,671
Consulting Agreements - P&D	$ 423,811
Management Agreements	$ 696,831
other expenses	$ 100,279
Transfers to Block Grant	$ 4,000,000
CHA Program Loans to LLCs	$ 7,767,386
Total Uses	**$ 13,282,978**
Net Surplus (Deficit)	**$ (11,830,317)**
FUND BALANCE- 12/31/2022	**$ 8,032,184**

CENTRAL OFFICE COST CENTER - FY22

Various fixed and fee-for-service fees support the Central Office Cost Center ("COCC"). Apart from management fees earned through the federal programs, the COCC earns fees from the mixed financed projects it manages. These management fees are in accordance with the operating agreements, usually ranging between 4.5%-6.0% of collections, some of which are deferred, and are established based on market rates.

	CY 2022
Sources	
Total Management Fees	$ 5,576,021
Admin fee transfers	$ 1,250,000
Fee-for-Service fees	$ 959,422
Total Sources	**$ 7,785,443**
Uses	
Administrative Salaries	$ 3,403,882
Central Maintenance	$ 1,767,581
Benefits	$ 1,338,862
Administrative Contracts	$ 220,581
Office Rent	$ 213,654
Other Admin. OH	$ 960,962
Total Uses	**$ 7,905,522**
Net Surplus (Deficit)	**$ (120,079)**

MTW BLOCK GRANT - FY22

The MTW Block Grant allows the CHA to combine all funding sources (Operating Fund, Housing Choice Voucher Operating Fund, and Capital Fund) into one account for redistribution depending on program needs. The Block Grant also supports the agency to expend pre-development funds in the planning stages of construction and other special pre-approved MTW initiatives.

	CY 2022
Estimated Beginning Fund Balance-1/1/2022	**$ 17,906,753**
Sources	
HCV Transfers for MTW initiatives	$ 1,500,000
HCV Transfers for program loans	$ 16,301,319
Total Sources	**$ 17,801,319**
Uses	
Transfers to MRVP / State Housing	$ 99,061
P & D Admin Support	$ 3,315,445
Working Capital	$ 2,283,124
Program Loans to LLCs	$ 25,444,265
System Software Fund	$ 2,219,487
Workforce/Tenant Service funding	$ 900,000
PT Lab and MTW initiatives	$ 351,706
Total Uses	**$ 34,613,087**
Net Surplus (Deficit)	**$ (16,811,768)**
Estimated Fund Balance- 12/31/2022	**$ 1,094,985**

OTHER FUNDS - FY22

	Resident Services	Resident Services Empowerment Inc	Total Resident Services	Cambridge Housing Affordable Lending Corp
Sources				
Operating Receipts	$ 800,353	$ 292,500	$ 1,092,853	$
Interest income	$	$	$ -	$ 753,754
Funding from Block grant	$ 900,000	$	$ 900,000	$
Other Operating Receipts	$ 1,646,458	$ -	$ 1,646,458	$
Total Sources	**$ 3,346,811**	**$ 292,500**	**$ 3,639,311**	**$ 753,754**
Uses				
Admin Salaries & benefits	$ 2,211,659	$ 126,409	$ 2,338,068	$ -
Management Fees	$	$	$ -	$ 38,248
Interest expense	$	$	$ -	$ 126,000
Other Admin expenses	$ 585,732	$ 25,434	$ 611,166	$ 12,180
Total Uses	**$ 2,797,391**	**$ 151,843**	**$ 2,949,234**	**$ 176,428**
Net Surplus (Deficit)	**$ 549,420**	**$ 140,657**	**$ 690,077**	**$ 577,326**
Funding to Foundation	$ 9,200	$ 167,150	$ 176,350	**$** -
Net Surplus (Deficit)	**$ 540,220**	**$ (26,493)**	**$ 513,727**	**$ 577,326**

HUD REQUIREMENTS
HOUSING STOCK

(II) GENERAL OPERATING INFORMATION
ANNUAL MTW REPORT

A. HOUSING STOCK INFORMATION

i. Actual New Project Based Vouchers
Tenant-based vouchers that the MTW PHA project-based for the first time during the Plan Year. These include only those in which at least an Agreement to enter into a Housing Assistance Payment (AHAP) was in place by the end of the Plan Year. Indicate whether the unit is included in the Rental Assistance Demonstration (RAD).

PROPERTY NAME	NUMBER OF VOUCHERS NEWLY PROJECT-BASED		STATUS AT END OF PLAN YEAR**	RAD?	DESCRIPTION OF PROJECT
	Planned*	Actual			
116 Norfolk St	37	37	Committed	Y	RAD/Section 18 Blend
Fresh Pond Apartments	166	166	Leased	N	Preservation Property

Planned: 203 Actual: 203 Total Vouchers Newly Project-Based

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

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

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

CHA now expects 116 Norfolk Street to convert in FY22. Fresh Pond is an expiring use property that is now expected to be converted in FY22.

ii. Actual Existing Project Based Vouchers

Tenant-based vouchers that the MTW PHA is currently project-basing in the Plan Year. These include only those in which at least an AHAP was in place by the beginning of the Plan Year. Indicate whether the unit is included in RAD.

PROPERTY NAME	NUMBER OF PROJECT-BASED VOUCHERS		STATUS AT END OF PLAN YEAR**	RAD?	DESCRIPTION OF PROJECT
	Planned*	Actual			
165 Western Ave	8	8	Leased/Issued	N	Project-based Units
196-98 Auburn St	9	9	Leased/Issued	N	Project-based Units
217 Western Avenue	6	6	Leased/Issued	N	Project-based Units
2595 Mass Ave	3	3	Leased/Issued	N	Project-based Units
35 Harvey St	5	5	Leased/Issued	N	Project-based Units
396-398 Putnam	2	2	Leased/Issued	N	Project-based Units
402 Rindge Ave Apts	135	135	Leased/Issued	N	Project-based Units
411 Cambridge St	6	6	Leased/Issued	N	Project-based Units
455-463 Cambridge St	5	5	Leased/Issued	N	Project-based Units
47-49 Lee St	10	10	Leased/Issued	N	Project-based Units
Norfolk Street	5	5	Leased/Issued	Y	Project-based Units
803-815 Cambridge St	11	11	Leased/Issued	N	Project-based Units
808 Memorial Drive Housing	77	77	Leased/Issued#	N	Expiring Use Preservation Property
8-10 Lancaster Street	58	58	Leased/Issued	N	Project-based Units
196 – 198 Auburn Court	9	9	Leased/Issued	N	Project-based Units
Auburn Court Phase 1	46	46	Leased/Issued	N	Project-based Units
Auburn Court Phase 2	31	31	Leased/Issued	N	Project-based Units
Bishop Allen Apart-ments	33	29	Leased/Issued	N	Project-based Units
Briston Arms	48	48	Leased/Issued	N	Expiring Use Preservation Property
Brookside Terrace	153	153	Leased/Issued	N	Expiring Use Preservation Property
Burns Apartments Interim Holding LLC	195	195	Leased/Issued	N	Project-based Units
Scattered Condos	33	33	Leased/Issued	N	Project-based Units

CAH Inc - Ashton Place	8	8	Leased/Issued	N	Project-based Units
CAHC - 195 Prospect St	17	17	Leased/Issued	N	Project-based Units
Cambridge Court Apts	106	106	Leased/Issued	N	Project-based Units
Cambridgeport Commons	0	10	Leased/Issued	Y	Project-based Units
CCHD - 77 Elm St	3	3	Leased/Issued	N	Project-based Units
CCHD - 901 Mass Ave	1	1	Leased/Issued	N	Project-based Units
CCHD - Athens	2	2	Leased/Issued	N	Project-based Units
CCHD - Athens & Wendell	2	2	Leased/Issued	N	Project-based Units
CCHD - Bedrick	7	7	Leased/Issued	N	Project-based Units
CCHD - Oxford	6	6	Leased/Issued	N	Project-based Units
CCHD - Swartz Properties	9	9	Leased/Issued	N	Project-based Units
Center Street	0	1	Leased/Issued	Y	Project-based Units
Chapman Arms LLC	26	26	Leased/Issued	N	Project-based Units
Chauncy House	53	53	Leased/Issued	N	Project-based Units
Churchill Court LP	8	8	Leased/Issued	N	Project-based Units
Cleaves Court	29	29	Leased/Issued	N	Expiring Use Preservation Property
Coes Pond	248	250	Leased/Issued	N	Expiring Use Preservation Property
Columbia CAST LLC	9	9	Leased/Issued	N	Project-based Units
Columbus and Whittemore	0	5	Leased/Issued	Y	Project-based Units
Corcoran Park Interim Holding LLC	152	152	Leased/Issued	N	Project-based Units
Elderly Condos	0	5	Leased/Issued	Y	Project-based Units
Elm Place	11	11	Leased/Issued	N	Project-based Units
Essex St Management Inc	13	13	Leased/Issued	N	Project-based Units
Fairmont Street LLC	0	10	Leased/Issued	Y	Project-based Units
Family Condos	0	10	Leased/Issued	Y	Project-based Units
Garfield St LLC	0	8	Leased/Issued	Y	Project-based Units
Harwell Homes	4	4	Leased/Issued	N	Project-based Units
Hingham	0	4	Leased/Issued	Y	Project-based Units
Inman Square Apts	115	115	Leased/Issued	N	Project-based Units
Inman Street	0	4	Leased/Issued	Y	Project-based Units
Jackson Street LLC	0	10	Leased/Issued	Y	Project-based Units
Jackson Gardens	44	44	Leased/Issued	Y	Project-based Units
Jackson Place Apts	175	175	Leased/Issued	N	Project-based Units
JAS - Elm St	1	1	Leased/Issued	N	Project-based Units
JAS - Hovey	9	9	Leased/Issued	N	Project-based Units
JAS - Nobrega	9	9	Leased/Issued	N	Project-based Units
JAS - Scouting Way	9	9	Leased/Issued	N	Project-based Units
Jefferson Park Apartments LLC	103	103	Leased/Issued	N	Project-based Units
JFK Apartments	26	26	Leased/Issued	N	Project-based Units

John F Kennedy	44	44	Leased/Issued	Y	Project-based Units
Just-A-Start Corp - Otis	8	8	Leased/Issued	N	Project-based Units
Landfall	15	15	Leased/Issued	N	Expiring Use Preservation Property
Lincoln Way	63	53	Leased/Issued	Y	Project-based Units
Louis Barret Residences	135	135	Leased/Issued	N	Expiring Use Preservation Property
Lyndon B. Johnson Apts	174	174	Leased/Issued	Y	Project-based Units
Madison Park III	120	120	Leased/Issued	N	Expiring Use Preservation Property
Manning	203	203	Leased/Issued	Y	Project-based Units
Market Street	8	8	Leased/Issued	N	Project-based Units
McKay House	10	10	Leased/Issued	N	Project-based Units
Millers River	296	296	Leased/Issued	N	Project-based Units
Neville Assisted Living	38	38	Leased/Issued	N	Project-based Units
New Mass Pike Towers LP	148	157	Leased/Issued	N	Expiring Use Preservation Property
Newtowne Court	269	269	Leased/Issued	Y	Project-based Units
Port Landing	7	7	Leased/Issued	N	Project-based Units
Putnam Gardens LLC	123	123	Leased/Issued	Y	Project-based Units
Putnam Green LLC	36	36	Leased/Issued	N	Project-based Units
Putnam Place	8	8	Leased/Issued	N	Project-based Units
Putnam Square Apts	96	96	Leased/Issued	N	Project-based Units
Quincy towers	160	161	Leased/Issued	N	Expiring Use Preservation Property
Richdale and Ware	0	2	Leased/Issued	Y	Project-based Units
Rindge House	13	13	Leased/Issued	N	Project-based Units
River Howard LLC	34	34	Leased/Issued	Y	Project-based Units
Russell Apartments LLC	54	54	Leased/Issued	N	Project-based Units
Saint Paul	20	20	Leased/Issued	Y	Project-based Units
Smith House Preserva-tion	132	132	Leased/Issued	N	Project-based Units

Squirrel Brand LP	8	8	Leased/Issued	N	Project-based Units
St. Patrick's Place	3	3	Leased/Issued	N	Project-based Units
St. Stephen's	130	130	Leased/Issued	N	Project-based Units
Temple Place	40	40	Leased/Issued	N	Project-based Units
Trolley Rental LLC	34	34	Leased/Issued	N	Project-based Units
Valentine St	0	6	Leased/Issued	Y	Project-based Units
Washington Elms	176	176	Leased/Issued	Y	Project-based Units
Willow Street Homes LLC	14	14	Leased/Issued	Y	Project-based Units
Woodrow Wilson Court	69	69	Leased/Issued	Y	Project-based Units
1221 Cambridge Street	0	116	Leased/Issued	N	Expiring Use Preservation Property
Harwell Homes	0	14	Leased/Issued	N	Expiring Use Preservation Property
St Stephens	0	130	Leased/Issued	N	Expiring Use Preservation Property
808 Memorial Drive Housing II	136	136	Leased/Issued	N	Expiring Use Preservation Property
UDIC	26	26	Leased/Issued	N	Project-based Units
Frost Terrace	8	8	Leased/Issued	N	Project-based Units

Planned: 4,967 Actual: 5,284 Total Existing Project-Based Vouchers

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

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

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

As mentioned in the FY20 report, prior plans/reports under counted some of the expiring use properties. Additionally, timing of conversion of RAD/ FPLI properties can impact planned versus actual numbers.

iii. Actual Other Changes to MTW Housing Stock in the Plan Year
Examples of the types of other changes can include (but are not limited to): units held off-line due to relocation or substantial rehabilitation, local, non-traditional units to be acquired/developed, etc.

ACTUAL OTHER CHANGES TO MTW HOUSING STOCK IN THE PLAN YEAR

Vacant units were held off line for relocation of residents in buildings requiring substantial construction.

iv. General Description of All Actual Capital Expenditures During the Plan Year
Narrative general description of all actual capital expenditures of MTW funds during the Plan Year.

GENERAL DESCRIPTION OF ALL ACTUAL CAPITAL EXPENDITURES DURING THE PLAN YEAR
In 2022, the Cambridge Housing Authority expended over $77.4 million on construction activities while concluding construction on four large-scale projects impacting 669 apartments at the following properties: Truman Apartments, Millers River Apartments, Burns Apartments, and Roosevelt Towers.

B. LEASING INFORMATION

i. 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	85	720	1,020	60
MTW Housing Choice Vouchers (HCV) Utilized	76,008	81,648	6,334	6,804
Local, Non-Traditional: Tenant-Based	2,676	2,616	223	218
Local, Non-Traditional: Property-Based	0	0	0	0
Local, Non-Traditional: Homeownership	0	0	0	0
Totals	79,704	84,960	6,642	7,080

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

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

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

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

The totals are very close to expected benchmarks. CHA now counts individual households in the sponsor-based program. For example, two unrelated individuals may share a two-bedroom apartment in the program. CHA believes these two individuals should be counted as two separate households.

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	Use MTW Resources to Augment State MRVP Leasing Program HC.2001.01	60	48	5	4
Tenant-Based	Sponsor-based Voucher Program HC.2008.03	2,412	2,220	201	185
Service-Based	Pathways to Permanent Housing HC.2008.03A	204	348	17	29
Totals	_	2,676	2,616	223	218

* 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.

HOUSEHOLDS RECEIVING LOCAL, NON-TRADITIONAL SERVICES ONLY	AVERAGE NUMBER OF HOUSEHOLDS PER MONTH	TOTAL NUMBER OF HOUSEHOLDS IN THE PLAN YEAR
PPH-TA HC.2008.03A	6	6

ii. Discussion of Any Actual Issues/Solutions Related to Leasing

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

HOUSING PROGRAM	DESCRIPTION OF ACTUAL LEASING ISSUES AND SOLUTIONS
MTW Public Housing	Vacant units held offline to accomodate ongoing relocation during RAD Conversion and Section 18 Disposition.
MTW Housing Choice Voucher	N/A
Local, Non-Traditional	N/A

C. WAITING LIST INFORMATION

i. 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
Family Housing (MTW and Non-MTW)	Site-based	9,681	Open	No
Elderly/Disabled Housing (MTW and Non-MTW)	Site-based	1,987	Open	No
HCV Program (MTW and Non-MTW Vouchers)	Community-wide and site-based	17,675	Open	No
HCV Program SRO Only (MTW and Non-MTW Vouchers)	Community-wide	1,630	Open	No

Please describe any duplication of applicants across waiting lists:

Applicants are free to apply for any waitlist for which they are eligible. Across all programs CHA identified 20,918 unique applicants that submitted a total of 175,841 applications across all programs.

ii. 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.

N/A	N/A

D. INFORMATION ON STATUTORY OBJECTIVES AND REQUIREMENTS

i. 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	1
49%-30% Area Median Income	4
Below 30% Area Median Income	411

* This number is based on data provided by SBV partners. It represents AMI of current participants and not necessarily new participants. This is due to the high level of turnover in some programs. CHA emphasizes collecting/maintaining AMI records at admission with SBV sponsors to the best of their ability. This is is the best representation of the population served in the LNT category with the exclusion of services only.

ii. 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 AD-JUSTMENTS	BASELINE MIX NUMBER	BASELINE MIX PERCENTAGE
1 Person	N/A	N/A	N/A	2270	50%
2 Person	N/A	N/A	N/A	999	22%
3 Person	N/A	N/A	N/A	609	13%
4 Person	N/A	N/A	N/A	372	8%
5 Person	N/A	N/A	N/A	194	4%
6+ Person	N/A	N/A	N/A	94	2%
TOTAL	N/A	N/A	N/A	4,358	100%

* CHA has provided household size in the first year that it was required as part of its FY14 Annual MTW Report requirement. The FY14 household size info will serve as our baseline number going forward.

MIX OF FAMILY SIZES SERVED (in Plan Year)				
FAMILY SIZE	BASELINE MIX PERCENTAGE**	NUMBER OF HOUSE-HOLDS SERVED IN PLAN YEAR^	PERCENTAGE OF HOUSEHOLDS SERVED IN PLAN YEAR^^	PERCENTAGE CHANGE FROM BASELINE YEAR TO CURRENT PLAN YEAR
1 Person	50%	3,473	52%	2%
2 Person	22%	1,542	23%	1%
3 Person	13%	814	12%	1%
4 Person	8%	506	8%	0%
5 Person	4%	201	3%	1%
6+ Person	2%	114	2%	0%
TOTAL	100%	6,650	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.

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

iii. 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
Financial Stability and Savings SS.2013.01*	40	Participants experiencing positive EOP
Financial Stability and Savings SS.2013.01**	56	Participants that experienced a reduction in subsidy.
Sponsor-Based Voucher Program HC.2008.03*	13	Positive exit from Sponsor-based voucher program.
Implement Recertifications Every two years for Households/hcv- HC.2008.08 *	47	Positive EOP from CHA Housing
Rent Simplification Program (RSP)/Public Housing - CE.2006.01*	22	Positive Exit from CHA Housing
	178	(Households Duplicated Across MTW Activities)

178 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.

** This metric is a CHA metric and does not represent a number where metric SS#8 was used. CHA believes the reduction in subsidy these participants experienced represent an important self-sufficiency step. If this group is removed, then the total would come to 99 across all instances of SS#8.

PROPOSED MTW ACTIVITIES

All proposed activities that are granted approval by HUD are reported in Section IV as “Approved Activities.”

APPROVED MTW ACTIVITIES

IMPLEMENTED ACTIVITIES

MTW STATUTORY OBJECTIVE II: INCREASE SELF-SUFFICIENCY

SS.2013.01 - FINANCIAL STABILITY AND SAVINGS PLUS (FSS+)

IMPLEMENTATION YEAR	PREVIOUSLY APPROVED AUTHORIZATION
Approved in FY13 MTW Plan and implemented in FY13	2009 MTW Agreement, Attachment C.B.1.b.iii, C.B.2 and C.E.

DESCRIPTION

CHA partnered with Compass Working Capital to design and implement two programs based on HUD's Family Self-Sufficiency (FSS) model. The first is a five-year program called Financial Stability and Savings Plus (FSS+) that was launched in FY13 and available only to HCV particpants. The second, a 3-year pilot called Rent-to-Save (RTS), was launched in March 2016 and available only to residents at two family public housing sites (Jefferson Park Federal and Corcoran Park). Compass provides financial education for both program with a focus on five core areas:

1. Financial Goal Setting
2. Budgeting
3. Credit and debt
4. Savings
5. Identifying resources

Participants that enroll in financial education work with a financial coach to achieve short- and long-term goals. Participants track, prioritize, and budget their cash flow to lower debt, increase credit score, and build assets. Participants identify any negative item(s) on their credit reports and develop debt repayment plans, if applicable, to rebuild credit. Coaches also connect participants with resources and organizations that help participants achieve their goals. A key component of the program is the establishment of an Escrow Savings Account for each participant. Participants that experience an increase in wage income save a portion of their rent increase in an escrow account. CHA maintains the account under the participant's name for up to five years. Occasional withdrawals (interims) from one's account may be taken to meet a participant's goal. Upon graduation, participants use the balance of their escrow savings to further their financial goals.

IMPACT

See metrics.

CHANGES TO ACTIVITY, BENCHMARKS, BASELINE, METRICS

CHA wants to note that we proposed a new bands-based escrow calculation in the FY20 MTW Plan. CHA was able to implement the new bands-based escrow model proposed in the FY20 Plan. Current participants were able to select between the new and old model of calculation. All new participants enrolled in FY21 are using the new bands-based escrow. This may impact escrow amounts from FY21 forward. CHA plans to explore ways to expand

enrollment to Section 8 subsidized participants at RAD and Section 18 properties.

SS.2013.01 - FINANCIAL STABILITY AND SAVINGS PLUS (FSS+)

SS #1: Increase in Household Income				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Average earned income of households affected by this policy in dollars (increase).	**Average earned income of the first 80 program participants:** $24,534 **Average earned income of RTS participants**: $20,124 JP Total: $18,676 CP: $21,924 Average earned income of RTS participants that have earned income: $32,320 JP Total: $32,489 CP: $32,343	**Average Earned Income for FSS+ participants**: $41,226 Average earned income for FSS+ Participants that have been in the program at least one year and experienced an increase in earnings: $39,957	All FSS+ participants: 183 Average Earned Income for all FSS+ participants: $46,359 FSS+ participants that have been in the program for at least one year and experience an increase in earnings: 56 **Average Earned Income for FSS+ participants that have been in the program for at least one year and experienced an increase in earnings**: $51,208	Yes.
SS #2: Increase in Household Savings				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Average amount of savings/escrow of households affected by this policy in dollars (increase).	$0	**For participants that have been in the program for at least one year and established an escrow account:** $3,771	**FSS+ participants that have been in the program for at least one year and established an account** $5,030	Yes.
SS #5: Households Assisted by Services that Increase Self Sufficiency				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**

Number of households receiving services aimed to increase self sufficiency (increase).	0 households	FSS+ participants: 78	**FSS+ participants:** 183	Yes. CHA has been able to resume full enrollment post-covid and after making software adjustments for tiered escrow calculation.
SS #6: Reducing Per Unit Subsidy Costs for Participating Households				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Average amount of Section 8 and/or 9 subsidy per household affected by this policy in dollars (decrease).	**Avg Housing Assistance Payment (HAP) at FSS+ enrollment for participants that have been in the program for at least one year:** $1008	Participants that have been in the program for at least one year: 75 **Avg Housing Assistance Payment (HAP) at FSS+ enrollment for participants that have been in the program for at least one year:** $1,302	FSS+ Participants that have been in the program for at least one year: 77 **Avg HAP of FSS+ participants that have been in the program for at least one year:** $1,413	Yes.
SS # 7: Increase in Agency Rental Revenue				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
PHA rental revenue in dollars (increase) (Monthly Basis)	**Based on participant months in the program during the FY**: $41,583	$81,347	**<u>Monthly</u> TTP aggregated for FSS+ participants that have been in the program for at least one year:** $86,777	Yes.
SS #8: Households Transitioned to Self Sufficiency				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Number of households transitioned to self-sufficiency (increase)	0	**Number of households that have experienced an end in subsidy during the FY:** 44	Number of FSS+ participants that **experienced end in subsidy**: 40	No, but close. This is likely due to the temporarily decreased enrollment.
CHA: Increase in Credit Score				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Percent who increase credit score for participants who have been in the program for at least one year.	0	60%	FSS+ Participants: 65%	Yes.

Average increase in credit score points for participants who have been in the program for at least one year and experienced an increase (in points).	0	40 points	FSS+ Participants: 41	Yes.
CHA: Decrease or Maintain Zero Collection Debt				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Percent who decrease or maintain zero collection debt.	Percent of participants who had been in the program for the entire year during the first full year of implementation (60 participants) and had zero collection debt at intake: 45	Percent of participants who had been in the program for an entire year and had a decrease or zero collection debt: 70%	**Percent of FSS+ participants in the program for at least an entire year and had a decrease or zero collection debt: 82%**	Yes.
CHA: Increase in Household Income				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Median earned income of households affected by this policy in dollars (increase). For those who have been in the program for one year and experienced an increase in earnings.	$20,800	FSS+ Participants that have been in the program for at least one year: $37,934 FSS+ Participants that have been in the program for at least one year and experienced an increase in earnings: $35,656	All FSS+ participants: 77 All FSS+ participants: $45,143 FSS+ Participants that have been in the program for at least one year and experienced an increase in earnings: 56 **FSS+ Participants that have been in the program for at least one year and experienced an increase in earnings:** $47,308	Yes.
Percent who experienced an increase in annual earned income out of all participants who have been in the program for at least one year.	0	FSS+ Participants that have been in the program for at least one year: 95%	**FSS+ Participants:** 73%	No.
CHA: Households Transitioned to Self-Sufficiency				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Number of households transitioned to self-sufficiency (increase). Reduction in Subsidy (RIS)	0	**Number of households that have been in the program for at least one year and experienced a reduction in subsidy during the FY**: 74	**FSS+ Participants that have been in the program for at least one year <u>and</u> experienced a reduction in subsidy**: 56	No.

MTW STATUTORY OBJECTIVE I: INCREASE HOUSING CHOICE FOR LOW-INCOME FAMILIES

HC.2011.01 - EXPIRING USE PRESERVATION PROGRAM

IMPLEMENTATION YEAR

Approved in FY11 and implemented in FY12.

PREVIOUSLY APPROVED AUTHORIZATION

2009 Agreement, Attachment C.B.1.b.i, ii and vii
2009 Agreement, Attachment C.D.2.a and D.3.a and b

DESCRIPTION

CHA converts Enhanced Vouchers to Project-Based Vouchers for affordable properties (owned by private or nonprofit entities) undergoing maturing mortgages, mortgage prepayment, or attached with project-based assistance (PBA) contracts set to expire. This activity ensures affordability of hard units in Cambridge and across the state of MA for at least an additional fifteen years. Many of these expiring use units were made affordable through HUD subsidies with limited terms of between 5 and 30 years. Upon expiration of the subsidies, property owners may charge market rate rents for the same units. HUD provides Enhanced Vouchers (EV) to eligible residents who are unable to pay the market-rate rent. If the resident moves to a different property the enhanced voucher converts to a regular tenant-based voucher and the resident's former unit becomes unsubsidized and available at market-rate. This MTW activity converts Enhanced Vouchers to Project-Based Vouchers so that residents can continue to live in their unit and, at the same time, affordability is preserved and attached to the unit rather than the resident. In some instances a minimum number of tenants must elect to convert their enhanced voucher to a project-based voucher in order for the project to successfully close. In January 2014, Smith House in Roxbury, MA was CHA's first expiring-use property outside of Cambridge. This activity counts the number of total units preserved. For the number of expiring use units preserved through a HAP contract, see metrics in HC.2001.02 - Implement Local Project-Based Assistance Leasing Program Activity.

IMPACT

After the addition of 166 units at Fresh Pond Aparemtents, 2,144 total units have been preserved as a result of this activity.

PROJECT	CITY	HOUSING TYPE	FY ISSUE OF HAP	UNITS UNDER HAP CONTRACT*	UNITS PRESERVED*
1221 Cambridge Street	Cambridge	Family	FY12	116	116
411 Franklin Street	Cambridge	Elderly/Disabled	FY12	98	98
Bishop Allen	Cambridge	Family	FY12	32	32
Harwell Homes	Cambridge	Family	FY14	14	14
Smith House	Roxbury	Elderly/Disabled	FY14	132	132
402 Rindge	Cambridge	Family	FY15	110	110
St. Stephens	Lynn	Elderly/Disabled	FY15	130	130
Louis Barrett	Lynn	Elderly/Disabled	FY15	145	145
Brookside Terrace	Southbridge	Family	FY15	168	168
Cleaves Court	Boston	Family	FY16	36	36
Chauncy House	Boston	Family	FY16	53	53
MassPike	Boston	Family	FY16	157	157
808 Memorial Drive	Cambridge	Family	FY16	76	76

PROJECT	CITY	HOUSING TYPE	FY ISSUE OF HAP	UNITS UNDER HAP CONTRACT*	UNITS PRESERVED*
Briston Arms	Cambridge	Family	FY16	50	50
Coes Pond	Worcester	Elderly/Disabled	FY16	250	250
Madison Park	Boston	Family	FY16	120	120
Landfall Apartments	Boston	Family	FY17	15	15
Quincy Tower	Boston	Elderly/Disabled	FY17	162	162
808 Memorial Drive II	Cambridge	Family	FY20	136	136
Fresh Pond Apartments	Cambridge	Family	FY22	166	166
TOTAL				**2,144**	**2,144**

*Units under HAP include EVs that on turnover will add unit to PBV HAP.

CHANGES TO ACTIVITY, BENCHMARKS, BASELINE, METRICS

No new significant or insignificant changes to activity or metrics.

HC.2011.01 - EXPIRING USE PRESERVATION PROGRAM

HC #2: Units of Housing Preserved				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase).	0	Total Units: 1,978 Units already preserved: 1,978 **Units Planned:** 166	Units already preserved: 1,978 **Units Preserved in FY:** 166	Yes.

HC.2008.03, HC.2008.03A, HC.2008.03.B - SPONSOR-BASED VOUCHER PROGRAM

IMPLEMENTATION YEAR

Hard To House: Approved and implemented in FY08.
PPH-TH: Approved and implemented in FY14. Expanded in FY17.
PPH-HH: Approved in FY10. Implemented in FY11. Modified in FY13 and FY14.

PREVIOUSLY APPROVED AUTHORIZATION

2009 MTW Agreement, Attachment C.D.2

DESCRIPTION

The Sponsor-Based Program is composed of three programs:

1. Hard to House
2. Pathways to Permanent Housing - Transition House (PPH-TH)
3. Pathways to Permanent Housing - Heading Home (PPH-HH).

All programs include either the provision of housing only or a combination of housing and supportive services. The majority of housing is established through non-profit partners receiving sponsor-based vouchers. Pathways to Permanent Housing - Transition House is the only program in which housing in a CHA hard unit is provided. Below are Description/Updates of the programs.

1. HARD TO HOUSE PROGRAM (HC.2008.03)

CHA partners with local service providers that work directly with the hard-to-house population including households and individuals with psychiatric, developmental and behavioral disabilities. CHA provides housing assistance only while the local service provider provides intensive support services and case management to the hard-to-house households served. CHA allocates a specific number of vouchers for this program and service providers may end up serving more than one household or individual per voucher for the year. In May 2022, CHA began a sponsor-based partnership with Boston Medical Center (BMC). BMC works with female and non-binary participants who are experiencing homelessness and have significant medical and/or behavioral complexity to stabilize in transitional housing, re-connect to preventative healthcare services, and prepare for the move to permanent housing. CHA has allocated additional vouchers at the YWCA for this partnership. The following table identifies partnerships and vouchers allocated:

	SERVICE PROVIDER	START	TARGET POPULATION	SBV
1	CASCAP, Inc.	2009	Housing stabilization for CASCAP tenants at risk of homelessness due to mental health, substance abuse or seeking vocational goals.	0[1]
2	Heading Home, Inc.	2009	Homeless families/individuals.	22
3	YWCA	2009	Participants at YWCA	40
4	Just A Start Corp.	2009	YouthBuild participants requiring emergency or transitional housing.	1

5	Transition House	2009	Victims of domestic violence.	14
6	Specialized Housing, Inc.	2009	Adults with developmental disabilities.	1
7	Vinfen	2009	Adults with psychiatric disabilities served through Cambridge Supported Housing Program.	1
8	The Home for Little Wanderers	2013	Individuals in child welfare system; aging out of foster care system; Roxbury Village (8) and Temple Street (15).	23
9	Y2Y	2016	Homeless/street involved youth, ages 14-24.	22
10	Somerville Homeless Coalition	2016	Homeless families/individuals.	2
11	Casa Myrna Vazquez	2017	Survivors of the sex trade.	8
			TOTAL	**134**

1. This partnership agreement ended.

2. PATHWAYS TO PERMANENT HOUSING – TRANSITION HOUSE (HC.2008.03A)

This initiative started out as a three-year pilot that includes the provision of hard units in CHA housing and services for Transition House families that have shown they are ready to move into permanent housing. CHA makes two units of housing available to Transition House, who in turn assumes all tenant responsibilities for those two units. Transition House selects and, with assistance from CHA, pre-screens two families to live in the units for one-year. The families must have been on the CHA waiting list for at least one year and be a Transition House client for at least 90 days. During the year, the families are expected to occupy the units in accordance with CHA's occupancy policies. There is an Entity Lease between Transition House and CHA (modeled after the CHA Public Housing Lease), and a Participant Agreement between Transition House and the family. The families pay a program fee based on 30% of the family income and the fee is collected by Transition House and provided to CHA. At the end of the one year period, families in full compliance may gain full CHA resident status and lease the unit directly from CHA.

In addition, four subsidies have been allocated to fund a liaison to provide supportive services concerning domestic violence-related issues to families in the program, other CHA residents, CHA staff, voucher holders, applicants, and voucher landlords for a three-year period. At the end of the three years, the four subsidies were to be converted to mobile vouchers to Transition House families, with the expectation that Transition House will have secured outside funding to support the liaison position.

In 2017, CHA extended its partnership with Transition House and expanded the program to include on an annual basis, up to 4 units of either housing or a modified sponsor-based voucher that would allow the family to live in a rental unit in the private market. Also, CHA's investment of the 3-year pilot has enabled Transition House to expand the program to a 4-person Community Support Partnership (CSP) to increase awareness, provide outreach and training

on domestic violence and related topics. The CSP team is made up of a Director, Community Liaison, Community Advocate, and Child and Family Liaison. The following table demonstrates how CHA's pilot funding and subsequent increase has been leveraged to secure funding from the City of Cambridge, MA Office of Victims Assistance, and Tufts Health Plan Foundation and expand supportive services to CHA residents and the City of Cambridge.

3. PATHWAYS TO PERMANENT HOUSING - HEADING HOME (FORMERLY FAMILY OPPORTUNITY SUBSIDY (FOS) PROGRAM) (HC.2008.03.B)

Based on increasing needs for transitional housing in MA and an evaluation of CHA and Heading Home's experience with FOS, in FY14 CHA modified the program to address the needs of this hard-to-house population. The program was re-designed as a two year program that supports families in building their credit, financial management, and other skills so that they may be eligible for permanent housing with CHA after program completion. Under the redesign, Heading Home serves as "CHA tenants" by assuming all tenant responsibilities attached to the CHA vouchers. Heading Home selects clients based on their readiness to move into permanent or transitional housing. They then provide the units to these clients for a set amount of time and make it possible for households in difficult circumstances to live in safe and secure transitional housing with the potential to move into permanent housing.

The nonprofit partner (Heading Home) will provide and administer an escrow account for participants after the sponsor-based period so that they can build assets through an incentivized savings Plus One Payout program. CHA does not administer or track this program as it operates independent of CHA.

IMPACT

The following are highlights that some partners shared regarding recipients of the sponsor-based program during the FY. Not all partners provided highlights, as we wanted to provide a space for our partners to share openly and without obligation. In the interest of protecting the privacy of sponsor-based voucher holders, CHA does not have any more information regarding the highlights below. In addition we do not track income detail, employment/ student status or outcomes beyond their participation in the program.

Partner	Highlights
Just-A-Start	These CHA funded apartments have had a major positive impact on the YouthBuild students by providing a safe place for them to stay and to work on things that were holding them back from success. Hovey has helped one of our students become stable, attend YouthBuild consistently, work at her Dunkin's job regularly and receive appropriate services in the community. She was able to complete all of her HiSET tests and earn her diploma in November of 2022; she is currently looking into colleges as she wants to further her education in the medical field. We were able to help a student who started back in November and was experiencing homelessness. Since being housed at Hovey these few months he has been able to obtain a job.
Somerville Homeless Coalition	In 2022, one of our long term clients successfully secured an Emergency Housing Voucher (functions as a section 8) and moved into a market rate apartment. They are now successfully stabilized in independent permanent housing and no longer receiving supportive case management services. We are confident that they have built the skills throughout their time in the CHA Sponsor Based program to be successful with their new independence.

Partner	Highlights
Somerville Homeless Coalition	In 2022, one of our long term clients successfully secured an Emergency Housing Voucher (functions as a section 8) and moved into a market rate apartment. They are now successfully stabilized in independent permanent housing and no longer receiving supportive case management services. We are confident that they have built the skills throughout their time in the CHA Sponsor Based program to be successful with their new independence.
YWCA (BMC Partnership)	Participant Quotes Quote from participant #1: "It's a great program. [The staff] were with me from step one. When we went to screen at Millers River, I was confused and didn't understand anything but they were there to help me fill out the paper work. I couldn't do that myself. I am very blessed to be here. They are on top of things, they communicate very well, always provide me with updates. I feel like this program cares." Quote from participant #2 "I feel secure at the YWCA. I don't get locked outside anymore. I have my own space where I can relax and take care of myself. You are patient with me, you respond quick when I need help. You always help me with everything that I need.' Participant Stories Participant #3 is a woman in her 60s who was referred by her PCP to the program. At the time she was homeless, staying in various shelters. She had been working as a live-in PCA, but was not on the lease so when her client had to transition to a Skilled Nursing Facility she became homeless. When she first moved to the YWCA she was very guarded and distrustful of staff and the other women there. She had recently lost her son, and his two children had to go into foster care because she was homeless at the time and could not care for them. She quickly moved into the YWCA after enrollment in the program. During her time at the YWCA, she gradually developed friendships with the other women there, and started opening up to staff. Participant #3 transitioned to a permanent apartment in a Cambridge Housing Authority subsidized housing development late in 2022, and she continues to do very well. Now that she is in housing, she is able to take a more active role in her grandchildren's lives. She has made some new friends in her building, and maintains relationships with YWCA staff and some of the women she knew when she lived there. At a recent gathering at the YWCA that included current residents as well as alumni from the BMC program, she was warmly received, and everyone referred to her as the "OG" because she was the first person to move into the BMC program.
Heading Home	In the reporting period, the vast majority of clients retained their housing by either staying enrolled in the program or moving out to permanent housing destinations. Additionally, Duley House welcomed two new clients, thus ending their homelessness. We are also happy to report that all clients were actively engaged in case management services and ongoing in-person clinical services, focusing on housing search and increasing social networks. In particular, four clients were referred to our internal Economic Mobility Services (EMS) department to obtain certifications in areas of interest and continue their educational goals. Lastly, all clients maintained their food security through their ongoing SNAP benefits and all clients maintained their health insurance. From an individual perspective, one client was able to connect back with both their medical and psychiatric provider and remained actively engaged by attending all appointments as scheduled both in telehealth and in person, showed compliance with their medication treatment/therapy and received rideshare services to appointments. The same client showed self-advocacy by working with their doctor to request a new wheelchair to assist with their mobility challenges and received a new phone to increase communication with their providers.

CHANGES TO ACTIVITY, BENCHMARKS, BASELINE, METRICS

No new signifcant or insignificant changes to activity or metrics.

HC.2008.03, HC.2008.03A, HC.2008.03.B - SPONSOR-BASED VOUCHER PROGRAM[1]

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).	0 households	Hard to House: 201 households (110 vouchers) Transition House: 5 Heading Home: 17 **Total Households:** 223	Hard to House: 386 households (134) vouchers Transition House: 6 Heading Home: 25 Total Households: 417	No.
HC #7: Households Assisted by Services that Increase Housing Choice				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Number of households receiving services aimed to increase housing choice (increase).	0 households	Hard to House: (201 households) 110 vouchers Transition House: 4 Heading Home: 17 **Total Households:** 223	Hard to House: 386 households (134) vouchers Transition House: 6 Heading Home: 25 Total Households: 41	No.
SS #5: Households Assisted by Services that Increase Self Sufficiency				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Number of households receiving services aimed to increase self sufficiency (increase).	0 households	Hard to House: (201 households) 110 vouchers Transition House: 4 Heading Home: 17 **Total Households:** 223	Hard to House: 386 households (134) vouchers Transition House: 6 Heading Home: 25 Total Households: 41	No.
SS #8: Households Transitioned to Self Sufficiency				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Number of households transitioned to self sufficiency (increase)	0 households	0 households	9 households	Yes.

HC.2008.03, HC.2008.03A, HC.2008.03.B - SPONSOR-BASED VOUCHER PROGRAM[1]

CE #4: Increase in Resources Leveraged[2]				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Amount of funds leveraged in dollars (increase)	$0	$3.7 million	$3.6 million	No, but close.
CHA HC: Number of Households Served Per Voucher				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Number of households served per voucher (Hard to House Program)	1 household	2.5 households	2.9	Yes.

1. Household count may exceed the voucher count depending on the program structure and client turnover.
2. Resources leveraged does not account for an abbreviated program period during the FY.

HC.2001.01 - USE MTW RESOURCES TO AUGMENT STATE MRVP LEASING PROGRAM

IMPLEMENTATION YEAR

Approved in FY01 MTW Plan and implemented in FY01.

PREVIOUSLY APPROVED AUTHORIZATION

2009 MTW Agreement, Attachment D.A.1

DESCRIPTION

This program allows CHA to preserve its Massachusetts Rental Voucher Program (MRVP) state rental assistance subsidies. As a stand-alone program, MRVP provides exceptionally low payment standards. CHA supplements these vouchers with MTW Block Grant funds so that the vouchers can be used in the Cambridge market. CHA originally allocated $21,600 for this program. The table below reflects the MRVP HAP and MTW funds spent in the last 5 years.

Fiscal Year	Households Served	MRVP HAP	MTW Funds	Monthly MRVP Average/HH	Monthly MTW Average/HH
FY18	7	$42,636	$64,150	$508	$764
FY19	7	$48,486	$83,139	$577	$990
FY20	7	$48,486	$83,139	$577	$990
FY21	7	$48,485	$83,139	$577	$990
FY22	4	$12,080	$28,469	$252	$593

IMPACT

The average monthly MTW funds reflect the disconnect between the MRVP payment standards and the Cambridge rental market. Average MTW funds have increased for households to remain in their units and meet landlord rent increases.

CHANGES TO ACTIVITY, BENCHMARKS, BASELINE, METRICS

No new significant or insignificant changes to activity or metrics.

HC.2001.01 - USE MTW RESOURCES TO AUGMENT STATE MRVP LEASING PROGRAM

HC #4: Displacement Prevention				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Number of households at or below 80% AMI that would lose assistance or need to move (decrease).	10 households	7 households	4 households.	No. These households were grandfathered in to contineu use of their MRVP vouchers. It was anticipated the number of households would drop over time.
CE #4: Increase in Resources Leveraged				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Amount of funds leveraged in dollars (increase)	0	Amount of MTW funds spend: $83,139 Total households served: 7 **MRVP subsidy amount:** $48,486	Amount of MTW funds spent: $28,469 Total households served: 4 **MRVP subsidy amount:** $12,080	No. See above.

HC.2000.04 - EXPAND SUPPLY OF PERMANENTLY AFFORDABLE HARD UNITS OF HOUSING

IMPLEMENTATION YEAR

Approved and implemented in FY00.

PREVIOUSLY APPROVED AUTHORIZATION

2009 MTW Agreement, Attachment C.B.1.ii, C.C.12, C.C.13

DESCRIPTION

This initiative focuses on increasing and retaining the supply of hard units in CHA's housing portfolio through an increase in project-based vouchers. This activity furthers housing choice in Cambridge for low-income households who would otherwise be excluded from living in the City due to the high cost of housing. New development is sporadic and difficult to benchmark on an annual basis. For this reason, this activity is dependent on market conditions and available development opportunities in any given year. CHA is interested in increasing units and development opportunities on existing sites slated for Section 18 Disposition. This activity includes the preservation of all CHA hard units (affiliate units, RAD, HILAPP and Section 18 Disposition) and construction of new hard units (e.g. Temple Place).

IMPACT

The goal of this activity is to preserve or build hard units and achieve deep affordability through long-term Project-Based Section 8 HAP contracts.

CHANGES TO ACTIVITY, BENCHMARKS, BASELINE, METRICS

None.

HC.2000.04 - EXPAND SUPPLY OF PERMANENTLY AFFORDABLE HARD UNITS OF HOUSING

HC #1: Additional Units of Housing Made Available				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase).	0	Units completed to date: 2,387 Anticipated in FY: 37 **Total Units**: 2,424	Units completed to date: 2,387 New units online: 37 **Total Units:** 2,424	Yes.

HC.2008.02 - CREATE MTW TRANSFER CATEGORY IN ADMIN PLAN (HCV) AND ACOP (PUBLIC HOUSING)

IMPLEMENTATION YEAR

Approved in FY08 MTW Plan and implemented in FY08.
Modified in FY13.

PREVIOUSLY APPROVED AUTHORIZATION

2009 MTW Agreement, Attachement C.D.1.b

DESCRIPTION

This activity increases housing options for households in crisis. CHA households may transfer between the Public Housing/RAD/Former Public Housing and Housing Choice Voucher programs and vice-versa on a case-by-case basis. In late FY13, CHA clarified that inter-program transfers related to reasonable accommodation requests do not fall into this activity because they are permitted regardless of MTW status. The number of MTW transfers is capped at 24 transfers in a fiscal year.

The following chart displays the number of transfers that have occurred, on a calendar year basis. The table goes back to 2014 when reasonable accommodation transfers were no longer included in the transfer count:

FISCAL YEAR	HCV to PH	PH to HCV
2022	0	0
2021	0	1
2020	0	0
2019	0	0
2018	0	2
2017	2	0
2016	0	0
2015	1	5

IMPACT

This activity was designed for households to use when needed. Benchmark and outcome values do not reflect the intent or success of the program.

CHANGES TO ACTIVITY, BENCHMARKS, BASELINE, METRICS

No new significant or insignificant changes to activity or metrics.

HC.2008.02 - CREATE MTW TRANSFER CATEGORY IN ADMIN PLAN (HCV) AND ACOP (PUBLIC HOUSING)

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).	0 households	0 households	0 households	Yes.

HOUSING CHOICE VOUCHER (HCV) PROGRAM ADMINISTRATIVE PLAN[1]

CHA's MTW initiatives for the Housing Choice Voucher program are categorized below according to the MTW statutory objective

1 As authorized under CHA's Amended and Restated MTW Agreement, Attachment C, Statement of Authorizations, CHA is authorized to develop operational policies and procedures for all Section 8 assistance that CHA is providing under Section 8(o) of the 1937 Act. CHA has revised and updated it Administrative Plan to implement changes in the Housing Choice Voucher program as a result of the MTW program.

INCREASING HOUSING CHOICE:

HC.2008.02	Create MTW Transfer Category in Admin Plan and ACOP	HC.2000.03	Allow over 40% of Income Toward Rent at Move-in
HC.2002.01	Rent Reasonableness Policy & 120% Exception Rents	HC.2000.02	Implement Vacancy and Damage Payments
HC.2001.02	Implement Local Project-Based Assistance Leasing Program		

REDUCE COST AND ACHIEVE GREATER COST EFFECTIVENESS IN FEDERAL EXPENDITURES

CE.2006.01	Rent Simplification Program

The RENT SIMPLIFICATION PROGRAM applies to both the Housing Choice Voucher and Public Housing Programs and are listed under each program separately because the metrics are different. The MTW TRANSFER CATEGORY is listed under Housing Choice Voucher only because the metrics are the same. Metrics may reflect a group of MTW policies or a single MTW policy, where applicable.

HC.2002.01 - RENT REASONABLENESS POLICY & 120% EXCEPTION RENTS/HCV

IMPLEMENTATION YEAR	PREVIOUSLY APPROVED AUTHORIZATION
Approved in the FY09 MTW Plan and implemented in FY09. Modified in FY10 and FY14.	2009 MTW Agreement, Attachment C.2.a.b.c

DESCRIPTION

This is a rent reasonableness policy to address the high cost of housing in the City of Cambridge. To retain landlords in the private housing market, CHA pays rent increases over the amount determined by HUD based on local rental market estimates. CHA already sets payment standards above 120% of HUD's Fair Market Rent (FMR) for larger bedroom units. This policy extends the payment standard to any size unit. Currently, most landlords are receiving the maximum amount permissible under CHA's payment standard. This initiative is also used to assist disabled households. On a case-by-case basis, disabled households that find a unit in the private rental market may receive an even greater exception rent.

In FY14 this policy was modified to be determined at initial move-in, before any increase in rent and before the contract anniversary date or at any other time at the discretion of CHA. Rent reasonableness will not be automatically redetermined based on a decrease in the published FMR. In establishing that rents are reasonable, CHA standards are based on an updated market analysis provided by an independent consultant every two years. Based on data in each market area, CHA will identify a low rent and high rent within that area. Rents must be within the range of the low and high rent to be considered reasonable. CHA reserves the right, at any time, to declare a rent unreasonable or establish an alternate reasonable rent determination methodology.

In CHA's effort to provide solid data, we are invested in creating reports that pull raw data directly from CHA's database. A new data point we have included is the percentage of new lease ups that occurred in Cambridge. We believe this number is decreasing as the Cambridge rents continue to increase. We feel it would be beneficial plan to include this percentage in future reports, using a consistent methodology. We have deliberately decided not to back in the numbers from past years because a report had not been developed and data methods were inconsistent year to year, with changes

in staffing.

IMPACT
This activity increases the ability for any new voucher holder to live in Cambridge.

CHANGES TO ACTIVITY, BENCHMARKS, BASELINE, METRICS
This activity counts only voucher holders (new admissions) that physically moved into a unit in Cambridge, MA at initial lease up. No new signifcant or insignificant changes to activity or metrics.

HC.2002.01 - RENT REASONABLENESS POLICY & 120% EXCEPTION RENTS/HCV

HC #4: Displacement Prevention				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
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.	0 households	Anticipated households that will lease units in Cambridge at over 120% FMR at initial move-in: 0	**Households that leased units in Cambridge at over 120% FMR at initial move in:** 0	No. Due to SAFMR, it is increasingly unlikely for a household to come in at a 120% exception rent.

HC.2001.02 - IMPLEMENT LOCAL PROJECT-BASED ASSISTANCE LEASING PROGRAM/HCV

IMPLEMENTATION YEAR
This program was approved and implemented in FY01. Modified in FY14.

PREVIOUSLY APPROVED AUTHORIZATION
2009 MTW Agreement, Attachment C.D.7

DESCRIPTION
This program allows CHA to expand its Project-Based portfolio beyond the 20% HUD threshold and allows property owners to project-base a building beyond the 25% HUD threshold. Property owners may coordinate with CHA to project-base up to 100% of a property. CHA originally envisioned this activity to support the Public Housing Preservation Fund (HC.2010.01 - closed out in FY14) and involve project-basing 250 to 375 vouchers to support CHA's at-risk public housing stock. The following are discrete flexibilities utilized under this activity.

Sections of 24 CFR 983 Waived Through MTW Authority

24 CFR	Citation	Description
Part 983, Subpart A	.6	Maximum Amount of PBV Assistance
Part 983, Subpart B	.51	Selection of PBV Owner Proposals
Part 983, Subpart B	.56	Cap on Number of PBV Units in Each Building
Part 983, Subpart D	.152	Purpose and Content of the Agreement to Enter into HAP Contract

Sections of 24 CFR 983 Waived Through MTW Authority

24 CFR	Citation	Description
Part 983, Subpart E	.202	Purpose of HAP Contract
Part 983, Subpart E	.206	HAP Contract Amendments (To Add or Subtract Contract Units)
Part 983, Subpart F	.258	Security Deposit: Amounts Owed by Tenant
Part 983, Subpart F	.261	When Occupancy May Exceed 25 Percent Cap on the Number of PBV Units in Each Building
Part 983, Subpart G	.301	Determining the Rent to Owner

In FY14 the following changes were implemented.

- Preference categories for occupancy of accessible units at project-based properties.
- Absolute preference for current residents of project-based properties.
- Fee for over-housed participants that choose to remain in their unit.
- Extended time-frame for requesting mobile vouchers, from one year to two years.

CHA will use and retain this activity in the RAD conversion even though it deviates from the RAD Project-Based Voucher rules. In FY17 CHA established owner-managed, site-based waiting lists (SBWL) to improve administration and communications with property owners of project-based buildings. Details are included in Chapter 16 of the Administrative Plan Part 1 and in Chapter 4 of the ACOP and Admin Parts 2 and 3.

IMPACT

In FY22 166 new units were project-based and preserved through expiring use.

CHANGES TO ACTIVITY, BENCHMARKS, BASELINE, METRICS

No new significant or insignificant changes to activity or metrics.

HC.2001.02 - IMPLEMENT LOCAL PROJECT-BASED ASSISTANCE LEASING PROGRAM/HCV

HC #1: Additional Units of Housing Made Available				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
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.	0 units	Units project-based through expanding supply of hard units in FY: 37 Units project-based through Expiring Use in FY: 166 Units project-based through private nonprofit developers in FY: 0 Anticipated new units: 203	Units project-based through expanding supply of hard units in FY: 37 Units project-based through Expiring Use in FY: 166 Units project-based through private nonprofit developers in FY: 0 **Total New units in FY:** 203	Yes.

HC.2001.02 - IMPLEMENT LOCAL PROJECT-BASED ASSISTANCE LEASING PROGRAM/HCV

HC #2: Units of Housing Preserved				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
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.	0 units	Units project-based through expanding supply of hard units in FY: 37 Units project-based through Expiring Use in FY: 166 Units project-based through private nonprofit developers in FY: 0 Anticipated new units: 203	Units project-based through expanding supply of hard units in FY: 37 Units project-based through Expiring Use in FY: 166 Units project-based through private nonprofit developers in FY: 0 **Total New units in FY:** 203	Yes.
CHA Metric: Percentage of PBAs Relative to Total MTW Vouchers				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
PBAs as percent of total MTW vouchers	26%	66%	68%	Yes.

HC.2000.03 - ALLOWING HOUSEHOLDS TO PAY OVER 40% OF INCOME TOWARD RENT AT MOVE-IN/HCV

IMPLEMENTATION YEAR

Approved in the FY00 MTW Plan and implemented in FY00.

PREVIOUSLY APPROVED AUTHORIZATION

MTW 2009 Agreement, Attachment C.D.2.a

DESCRIPTION

This program provides households more choices when renting. Although HUD permits households to pay over 40% of annual income towards rent in the second year of tenancy and beyond, it is not permitted in the first year of a voucher holder's initial lease up. This CHA activity allows new voucher participants (new admission) to rent units that fit their individual needs, provided that they can demonstrate the ability to commit to a higher income contribution towards their rent.

IMPACT

In past years, reported outcome numbers may have included zero income and minimum rent households that paid 40 percent of income towards rent, which did not represent the intent of this activity. Going forward, we will include in a separate table below a count of zero income households and households that pay minimum rent or less at new admission.

FY21 Zero Income - Paying Minimum Rent or Less at New Admission

	Household Count	Elderly/ Disabled Count	Average Household Size	Average Tenant Rent to Owner	Income Range
Zero Income at New Admission in Cambridge	1	1	1	$0	$0
Zero Income at New Admission outside Cambridge	0	0	0	0	$0
$50 Minimum Rent or less at New Admission in Cambridge	0	0	0	0	0
$50 Minimum Rent or less at New Admission outside Cambridge	1	0	3	$0	$6,840
Total	**2**	**0**			

CHANGES TO ACTIVITY, BENCHMARKS, BASELINE, METRICS To more accurately capture the intent of this activity, households that have $0 income at lease up were excluded. Households with annual income of $1,500 or less were also excluded because this activity is not intended to count minimum rent households (ie. 40% of a household with a $1,500 annual income equals $50 (minimum rent)).

HC.2000.03 - ALLOWING HOUSEHOLDS TO PAY OVER 40% OF INCOME TOWARD RENT AT MOVE-IN/HCV

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).	0 households	0 households	0 households at initial lease-up	No.

HC.2000.02 - IMPLEMENT VACANCY AND DAMAGE PAYMENTS/HCV

IMPLEMENTATION YEAR

Approved and implemented in FY00.

PREVIOUSLY APPROVED AUTHORIZATION

MTW Agreement, Attachment C.D.1.d

DESCRIPTION

This activity is a landlord incentive to continue providing housing units to voucher holders, thereby maintaining or increasing housing choice for low-income households. Landlords in the Tenant-Based voucher program may seek vacancy and damage payments on the condition that the unit is re-leased to a voucher family. Payments are also offered to landlords under a Project-Based Contract in cases where the contract already includes a clause for financial compensation for vacant units and damage reimbursements. This activity also encourages landlords to accept lower security deposits as CHA guarantees compensation for all damages in excess of the security deposit. To date, no record of a damage payment has been made to landlords.

The following changes took effect in FY14 under Administrative Plan Part 1:

1. Compensation in Cases of Vacancy Without Notice: In the event that a household vacates without notice, landlords may receive up to 80% of one month's contract rent if they do not require last month's rent at initial lease up.

2. Guaranteed Damage Compensation: Landlords who accept a reduced security deposit are guaranteed compensation for all damages in excess of the security deposit in the event that a household fails to pay.

3. Incentive to Rent to CHA Voucher Holders: Landlords (including those who require last month's rent at initial lease) with units occupied by a CHA voucher holder may be compensated up to 80% of contract rent to cover vacancy of those units, provided the new tenant is a CHA voucher holder.

IMPACT

The following provides (1) a breakdown of vacancy and damage payments by voucher program type and (2) a breakdown of landlords that have received at least one (1) HAP payment from CHA, by voucher program type. Please note, only one damage payment was made in FY 2018 with vacancy payments making up most of the cost of this activity.

CHANGES TO ACTIVITY, BENCHMARKS, BASELINE, METRICS

Beginning in FY20, CHA will provide a one-time leasing incentive payment per unit – in the amount of the contract rent – to landlords who have fewer than five units currently rented to CHA families; or to landlords who have not leased a unit to a CHA HCV family in the last three years (including landlords who have never leased a unit to a CHA family). This incentive is available only for units in Cambridge. This incentive will be unavailable for new inclusionary zoning units and those owned by non-profits that are already rent-restricted. Additionally, the payment is capped at CHA's payment standard.

2021 Vacancy/Damage Payments

Total Distinct Owners: 16

Total Distinct Units: 74

Total Vacancy/Damage Payments: $89,442

	In Cambridge				Outside Cambridge			
	Owner Count	Total Payments	Number of payments	Average payment	Owner Count	Total Payments	Number of payments	Average payment
Tenant-based vouchers	4	$13,076	11	$1,189	1	$1,250	1	$1,250
Project-based vouchers	13	$57,375	38	$1,510	5	$54,227	44	$1,232
Total	17	$70,451	54		6	$55,477	45	

2022 Owners

Total Distinct Owners: 1,271

	In Cambridge	Outside Cambridge
Tenant-Based	279	913
Project-Based	40	13
Inclusionary	49	1
State	41	13

1. Count includes any person or entity that received at least one HAP payment in the calendar year.

CHANGES TO ACTIVITY, BENCHMARKS, BASELINE, METRICS

None.

HC #2: Units of Housing Preserved				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase).	0	94	74	Yes. The number reflects total units in FY 2020.

MTW STATUTORY OBJECTIVE III: REDUCE COSTS AND ACHIEVE GREATER COST EFFECTIVENESS IN FEDERAL EXPENDITURES

CE.2006.01 - RENT SIMPLIFICATION PROGRAM (RSP)/HCV

PREVIOUSLY APPROVED AUTHORIZATION	2009 MTW Agreement, Attachment C.D.1c and Attachment C.Z.a
IMPLEMENTATION YEAR	

Approved and implemented in FY06.
Elderly/Disabled biennial recertification and the interim limit was approved in the FY08 MTW Plan and implemented in FY11.
Minimum rent approved and implemented in FY06. Modified in FY09 to reflect the three month minimum rent transition.
Asset income policy approved and implemented in FY06. Modified in FY13 to reflect the imputed asset income calculation.
Mixed family rent approved in FY09 MTW Plan and implemented in FY14.

DESCRIPTION

Rent Simplification was designed to simplify rent calculation and the recertification process, streamline administrative processes, and reduce paperwork burdens on clients and staff. CHA qualifies any adult at 58 years of age or older to be eligible for Elderly housing. The following includes policies under this activity.

Regular and Interim Recertification	Elderly and disabled households undergo biennial recertifications. Elderly and disabled households may request as many interim recertifications as needed. Non-elderly, non-disabled households undergo recertification on an annual basis. Voluntary interim recertification may be requested once between annual recertifications. In FY14, CHA implemented a $60 fee to participants that do not attend a scheduled reexamination appointment without giving 48 hours prior notice. This measure was adopted to increase participant accountability and timely completion of recertifications. In calendar year 2017, biennial recertifications under HC.2008.08 - IMPLEMENT RECERTIFICATIONS EVERY TWO YEARS FOR HOUSEHOLDS IN HCV was submitted in the FY18 MTW Annual Plan. The initiative was originally intended for project-based voucher holders but extended to all voucher holders. The extension of the biennial recertifications to all voucher holders was not implemented in FY17 and therefore does not yet affect metrics for this activity.
Minimum Rent	Minimum rent was increased from $25 to $50. Exception rent policies under HC.2002.01 - RENT REASONABLENESS POLICY AND 120% EXCEPTION RENTS were established to provide flexibility for disabled households. Zero income households have a minimum rent of $0 for the first three (3) months and also eligible to receive a utility reimbursement. Starting on the fourth month, zero income households that continue to have no reported income shall pay a minimum rent of $50.00 to the landlord and no longer receive a utility reimbursement.
Definition of Annual Income	1. Asset Income Calculation: Income from assets valued at $50,000 or less are excluded from the income calculation. Where household assets are valued at more than $50,000, CHA calculates and counts only the imputed income from assets using the market value of the asset and multiplying it by the CHA established passbook savings rate. CHA's passbook savings rate is determined consistent with HUD guidelines. 2. Annual income does not include the 1st 12 months of net income from operation of a business or profession, including any withdrawal of cash or assets from the operation of the business.

Below is a table of aggregate earned income of HCV participants in the last 10 fiscal years. CHA began reporting aggregate earned income in FY13.

AGGREGATE EARNED INCOME OF HCV HOUSEHOLDS		
Year	Aggregate Earned Income	Difference (+/-)
FY13	$22,259,348	
FY14	$22,624,322	+$364,974
FY15	$22,786,661	+$162,339
FY16	$38,650,549*	+$15,863,888
FY17	$47,205,015	+$8,554,446
FY18	$48,392,929	+$1,187,914
FY19	$46,971,135	-$1,421,794
FY20	$44,397,793	-$2,573,342
FY21	$44,209,930	-$187,863
FY22	$62,363,025	$18,153,095

*Aggregate earned income reflects a substantial increase in vouchers issued during FY16, primarily the result of Expiring Use Preservation activities.

Households with Real Property and Significant Assets

Policies were implemented to ensure that households that own real property and/or have significant assets do not qualify for admission or continued occupancy with CHA. In turn housing resources are provided to households that have no housing alternative resources and do not have significant assets. Elderly and disabled households are exempt from this policy.

Households that meet the following criteria are not eligible for admission or continued occupancy:

1. Non-elderly/disabled households whose net assets exceed $100,000.

2. Households who have a present ownership in, and a legal right to reside in, real property that is suitable for occupancy as a residence. This policy will not apply in the following circumstances:

- A household member or members are unable to reside in the property because of domestic violence.
- The household is making a good faith effort to sell the property.
- The property is owned in a country where there is verifiable evidence that the household would face retribution or repression were they to return to the country where the property is owned.

Changes in Family Composition

Households adding an adult member other than the spouse or partner of a household member, foster adult, live-in aide, or a guardian or caretaker for a minor child, will have their housing assistance payment reduced by 10% for each additional family member. The reduction will continue as long as the adult(s) is part of the household. The subsidy reduction is effective on the first of the month following the addition to the household.

Restriction on Moves

CHA may deny permission to move if the household was issued a voucher for a move and it expired without moving in the past twelve-month period.

Mixed Family Rent

Mixed families are families that include ineligible immigrants as well as citizens or eligible immigrant. CHA requires mixed families to pay 10 % more rent than they would pay if they were not a mixed family.

FY22 COUNT OF MINIMUM AND MIXED RENT HCV HOUSEHOLDS

HCV Participants	Mixed Rent	$0 Rent	Between $1 and $50 Rent	At $50 Minimum
In Cambridge	11	213	137	78
Outside Cambridge	11	142	93	34
Total	**22**	**355**	**230**	**112**

Authorized Unit Size Due to Changes to the Household

This policy allows changes in the authorized unit size the month following the approval of an additional household member. For decreases in household size, the authorized unit size will change at the first regular recertification after the decrease in household size occurs. This policy provides families with more timely increases in subsidy standards when family size increases.

Participants that have obtained written owner approval to add a household member may request that CHA add the household member as an authorized household member and re-determine the subsidy size based on the occupancy guidelines above. If the subsidy size for the family changes during the term of the HAP Contract, the “new” subsidy size is effective as follows:

- If the subsidy size is increased, the change is effective on the first of the month following the date that the new household member is approved by CHA.
- If the participant provided proper written notice of a decrease in household size, the change is effective at the first regular recertification following the change.
- If it is determined that the participant failed to provide the proper written notice of a decrease in family size, change is retroactive to the first of the month following the date that the household member left the household.

IMPACT

It is difficult to determine the impact of this activity through metrics due to our current inability to separate out rent increase interims from requested interims.

CHANGES TO ACTIVITY, BENCHMARKS, BASELINE, METRICS

No new changes.

CE.2006.01 - RENT SIMPLIFICATION PROGRAM (RSP)/HCV

CE #1: Agency Cost Savings/HCV				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Total cost of task in dollars (decrease).	Recertifications performed in FY06: 2,120 Interims Performed in FY06: 1,033 Recertification Time: 1.25 hours Interim Time: .75 hours Hourly cost of recertification specialist: $33.70 **Total cost:** $115,415	Recertifications to be completed: 1,681 Interims to be completed: 2,867 Recertification Time: 1 hours Interim Time: .5 hours Staff Cost/hr: $42.25 Total Cost: $131,588	Recertifications performed: 2,347 Interims Performed in FY22: 2,217 Recertification Time: 1.25 hours Interim Time: .75 hours Hourly cost of recertification specialist: $42.25 **Total cost:** $194,202	No. Note: the interim count includes rent increase interims. CHA's current software does not have a mechanism to differentiate interim types. This has resulted in an artificially high number of interims that are not related to the interim limit policy.
CE #2: Staff Time Savings/HCV				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**

Total time to complete the task in staff hours (decrease).	Recerts performed in FY06: 2,120 Interims Performed in FY06: 1,033 Annual Recertification Time: 1.25 hours Interim Time: .75 hours **Total time:** 3,425 hours	3,000 hours	Recerts performed: 1,309 Interims Performed: 3,239 Annual Recertification Time: 1.25 hours Interim Time: .75 hours **Total Time:** 4,597 hours	Yes.
CE #3: Decrease in Error Rate of Task Execution/HCV				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Average error rate in completing a task as a percentage (decrease)	Rent determination errors from a quality control audit in December 2013: 30%	30%	20%	Yes.
CE #5: Increase in Agency Rental Revenue/HCV				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Rental Revenue in dollars (increase)	Annual aggregate amount of rent that HCV holders were expected to pay to landlords/private property owners in FY13 based on March 31, 2013 data: $9,189,084	$20,901,515	$28,909,984	Yes.

HC.2008.08 - IMPLEMENT RECERTIFICATIONS EVERY TWO OR THREE YEARS FOR HOUSEHOLDS/HCV

DESCRIPTION

Similar to the biennial recertification policy in Public Housing, a biennial recertification schedule will apply to all HCV households. This initiative will allow residents to retain any additional income that they experience between recertifications and provide them with an opportunity to build savings and, at the same time, eases the burden of administering annual recertifications. For non-elderly, non-disabled households, up to two voluntary requests for interim rent reductions may be made between regular recertifications. The limit on interim recertifications will not apply to elderly or disabled households. In FY20 CHA implemented a triennial recertification cycle for elderly/disabled Project Based (PB) Program households where the sole source of all household income is from fixed income sources, i.e. SS, SSI or pension.

ACTIVITY STATUS

This initiative is active and implemented as described.

ANTICIPATED CHANGES

None.

IMPLEMENTATION YEAR

This inititiative was approved in FY08. It was modified in FY20 to include triennial recertifications for elderly, disabled project based households on a fixed income.

PREVIOUSLY APPROVED AUTHORIZATION

2009 MTW Agreement, Attachment C.D.C

CHANGES TO ACTIVITY, BENCHMARKS, BASELINE, METRICS

None

SS #3: Households Increase in Positive Incomes in Employment Status				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved**
Other: Full and/or Part-Time Employment	**Current Total:** 4094 **Total Employed:** 1783 **Percent:** 43%	**Current Total:** 4,182 **Total Employed:** 2,249 **Percent:** 54%	**Current Total: 4,330** **Total Employed:** 2,021 **Percent:** 47%	No.
SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)				
Unit of Measurement	**Baseline**	**Benchmark**		

Number of households receiving TANF assistance (decrease).	**Households receiving TANF:** 377	434	320	Yes.
SS #8: Households Transitioned to Self Sufficiency				
Unit of Measurement	**Baseline**	**Benchmark**		
Number of households transitioned to self sufficiency (increase).	Households that left housing as a result of renting or purchasing a home in the private market in current: 16	**37**	47	Yes. Number represents voucher given up. Assumed positive move to market.

CE.2006.01 - RENT SIMPLIFICATION PROGRAM (RSP)/HCV

CHA Metric: Average Household Income/HCV				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Average earned income of households affected by this policy in dollars	$22,072	$28,736	$34,134	Yes. This number represents the average earned income of households that have earned income.
CHA Metric: Increase in Household Median Income/HCV				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Median earned income of households affected by this policy in dollars .	$20,138	$25,281	$29,727	Yes. This number represents the median earned income of households that have earned income.

CE.2021.01 - EMERGENCY WAIVERS

IMPLEMENTATION YEAR	PREVIOUSLY APPROVED AUTHORIZATION
Approved and implemented in FY21.	MTW Agreement, Attachment C.D.1.c, C.C.4, C.E, C.D.2.a, C.D.3.b, C.D.5, C.D.c, C.D.2.b, C.C.11, C.C.9

DESCRIPTION

This activity mirrors some of the CARE Act waivers provided to prevent hardship during Covid-19. The activity will allow CHA to respond swiftly and flexibly in the event of a local or national emergency. CHA proposed to establish the following emergency waivers in response to economic and health related emergencies and natural disasters as declared by the Mayor or his/her designee including the authority to determine when to place and lift the waivers. CHA may revise, add and/or remove waivers as needed to address emergency related conditions.

Delayed Reexaminations: CHA will waive the requirement to conduct a reexamination of family income and composition at least annually. Currently CHA completes reexaminations on a biennial basis for Public Housing (PH) and Housing Choice Voucher (HCV) program households and on a triennial basis for PH households on ceiling rents and PH and HCV elderly/disabled households on fixed incomes. Where reexaminations have been delayed, CHA will complete the reexamination no later than the anniversary month of the following year. The next reexamination will be scheduled on the same anniversary month using the applicable reexam frequency for the family. For example, if a biennial reexam was due on July 2020, CHA would complete the reexam by July 2021. The next scheduled biennial reexam would take place in July 2023. This waiver applies to the PH and HCV programs.

Increase in Payment Standard: CHA will waive the requirement to apply the increased payment standard back to the regular effective date for delayed regular reexaminations. Instead, during periods of declared emergencies, CHA will apply the increased payment standard at the next interim reexamination after the effective date of the increased payment standard. If CHA completes a reexam late, CHA will apply the payment standard in effect on the effective date of the delayed regular reexamination. This waiver applies to the HCV program..

Delayed Regular HQS Inspections: CHA will waive the requirement for completion of regular HQS inspections at least biennially. Where a regular HQS inspection has been delayed, CHA will complete the HQS inspection no later than the anniversary month of the following year. The next HQS inspection will be scheduled on the same anniversary month using the applicable inspection frequency for the unit. For example, if an HQS inspection was due on July 2020, CHA would complete the inspection by July 2021. The next scheduled annual HQS inspection would take place in July 2022. CHA will continue to request a self-certification from the owner that no life-threatening conditions exist in the unit. Additionally, CHA will continue to conduct complaint inspections. This waiver applies to the HCV program.

Interim HQS Inspections: CHA will waive the requirement to conduct re-inspections to confirm repair; however, CHA will require that the owner self-certify and provide documentation that a life-threatening deficiency has been corrected within 24 hours of notification. CHA will accept an owner self-certification that non-life-threatening deficiencies have been corrected within 30 days of CHA notification. This waiver applies to the HCV program.

HQS QC Inspections: CHA will waive the requirement to conduct HQS quality control inspections and instead will suspend HQS quality control inspections until the emergency waiver has been lifted. This waiver applies to the HCV program.

Delayed PH Annual Self-Inspection: CHA will waive the requirement to complete annual self-inspections of PH units. CHA will continue to respond to and address serious conditions that could jeopardize life or property. When the waiver is lifted, CHA will resume self-inspections beginning with the units which were inspected on the oldest date. This waiver applies to the PH program.

FSS Contract of Participation: CHA will waive the requirement regarding the maximum extension of an FSS Contract of Participation (COP). During periods of declared emergency, CHA may extend a family's COP, using the declared emergency as good cause of the need for extension. For households who were already in the two-year extension period when the emergency was declared, CHA may extend their COP beyond the two year extension threshold. This waiver applies to the PH and HCV FSS program.

IMPACT

Given the duration of CARES Act waivers in FY21, this activity, was not necessary to accomplish the goal of preventing hardship due to Covid-19.

CHANGES TO ACTIVITY, BENCHMARKS, BASELINE, METRICS

None.

CE.2021.01 - EMERGENCY WAIVERS

CE #1: Agency Cost Savings/HCV				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**

Total cost of task in dollars (decrease).	Total Recertifications (HCV): 1,866 Recertification Time: 1.25 hours Staff Cost/hr: $42.25 Total Recertifications (PH): 1,951 Recertification time: 2.25 hours Staff Cost/hr: $42.25 Total Cost of Task: $284,015	$142,000 (CHA is estimating this activity will reduce recertification costs by about half)	N/A. Not a declared emergency in FY.	No.
CE #2: Staff Time Savings/HCV				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Total time to complete the task in staff hours (decrease).	Total Recertifications (HCV): 1,866 Recertification Time: 1.25 hours Total Recertifications (PH): 1,951 Recertification time: 2.25 hours Total Time of Task: 6,723 hours	3,362 hours (CHA is estimating this activity will reduce recertification time by half)	N/A. Not a declared emergency in FY.	No.

PUBLIC HOUSING[2] (PH), RAD AND FORMER PUBLIC HOUSING PROGRAM POLICIES

MTW initiatives for the Public Housing Program have been incorporated in the ACOP and categorized below according to MTW statutory objective. To the extent possible, ACOP policies have been carried over to the Administrative Plan Part 2 and Part 3. The two policies serve RAD and Former Public Housing sites respectively. Metrics may reflect a group of MTW policies or a single MTW policy, where applicable.

INCREASING HOUSING CHOICE:

HC.2008.02 Create MTW Transfer Category in Admin Plan and ACOP

REDUCE COST AND ACHIEVE GREATER COST EFFECTIVENESS IN FEDERAL EXPENDITURES

CE.2006.01 Rent Simplification Program

CE.2009.01 Implement Ceiling Rents

CE.2009.01 - IMPLEMENT CEILING RENTS/PUBLIC HOUSING

IMPLEMENTATION YEAR	PREVIOUSLY APPROVED AUTHORIZATION
Approved and implemented in FY06. Modified in FY09 and FY14.	2009 MTW Agreement, Attachment C.C.11

DESCRIPTION

This policy simplifies ceiling rent calculations so that it is reflective of annual cost increases through the use of market-related indices. On an annual basis, CHA will review market-related indices applicable to ceiling rents and make a determination on the index to be applied in the given year. Prior to securing MTW status, CHA used the original ceiling rent methodology derived from the old Performance Funding System (PFS) which was discontinued when HUD adopted the Asset Management approach after the Harvard Cost Study. PFS proved to be cumbersome, time consuming, and did not factor in the actual maintenance and operation cost of public housing. Whereas an annual ceiling rent adjustment under PFS would have required at least one full day to formulate, this activity reduces the annual ceiling rent adjustment to approximately 1 hour, once a year. This initiative was modified in FY09 to replace HUD's Annual Adjustment Factor (AFF) for the OCAF. In FY13 CHA did not implement an OCAF increase. In FY14 CHA discontinued the use of the OCAF. Rent increases attached to RAD or other section 8 project-based subsidy will use the OCAF to be consistent with rent increases that occur in CHA's voucher program.

IMPACT

In FY20, CHA identfied 3 public housing residents, 12 FPLI, and 54 RAD residents at ceiling rent.

2 As authorized under CHA's Amended and Restated MTW Agreement, Attachment C, Statement of Authorizations, CHA is authorized to develop and adopt local preferences and admission policies and procedures for admission into the public housing program in lieu of HUD statutes, regulations or other requirements based in the 1937 Act. Additionally, under the Restated MTW Agreement, CHA is required to revise the Admissions and Continued Occupancy Policy (ACOP) to implement changes in Public Housing Occupancy policies as a result of the MTW program.

CHANGES TO ACTIVITY, BENCHMARKS, BASELINE, METRICS

None.

CE.2009.01 - IMPLEMENT CEILING RENTS/PUBLIC HOUSING

CE #1: Agency Cost Savings				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Total cost of task in dollars (decrease).	Hourly cost of staff that sets ceiling rent: $66 **Total cost of task**: $1,584	Hourly cost of staff that sets annual ceiling rent: $68 **Total cost of task:** $0	Hourly cost of staff that sets annual ceiling rent: $68 **Total cost of task:** $0	Yes. HUD is requiring the use of this metric. CHA maintains that this is an estimate and not an actual measure of time saved; therefore, staff time should not be applied as a metric. CHA does not support the use of this metric and cautions that it is only an estimate.
CE #2: Staff Time Savings				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Total time to complete the task in staff hours (decrease)	24 hours	0 hours	0 hours	Yes. HUD is requiring the use of this metric. CHA does not support the use of this metric and cautions that it is an estimate; we do not have the data to support the claimed decrease in staff hours.
CE #5: Increase in Agency Rental Revenue				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Rental revenue in dollars (increase)	Ceiling rent revenue collected in FY14: $1,926,858	Ceiling rent revenue to be collected in FY: Total: $1,124,676	$1,216,392	Yes.

CE.2006.01 - RENT SIMPLIFICATION PROGRAM (RSP)/PUBLIC HOUSING

PREVIOUSLY APPROVED AUTHORIZATION 2009 MTW Agreement, Attachment C.C.2, C.C.4, C.C.5, and C.C.11

IMPLEMENTATION YEAR

Biennial recertifications, the tiered rent schedule and streamlined deductions were approved and implemented in FY06.
Minimum rent was approved and implemented in the FY06 and modified in FY09 to reflect the twelve month limit.
The asset income policy was approved and implemented in FY06 and modified in FY13 to reflect the imputed asset income calculation.
Mixed family rent was approved in FY09 and implemented in Public Housing the same year.

DESCRIPTION

Rent Simplification was designed to simplify rent calculation and the recertification process, streamline administrative processes, and reduce paperwork burdens on clients and staff. CHA qualifies any adult at 58 years of age or older to be eligible for Elderly housing. The following includes policies under this

activity.

Regular and Interim Recertification	Households are required to recertify income on a biennial basis. Households that experience an increase in income keep the additional income until the next recertification. Depending on when a positive income change occurs, a household may be able to retain more income on a biennial schedule than on an annual basis. Non-elderly, non-disabled households may apply for up to two interim rent reductions between regular recertifications. Thereafter, the household would apply for hardship. Elderly or disabled households may apply for as many interim recertifications as they need.
Minimum Rent	CHA implemented a tiered rent schedule. Household incomes fall into $2,500 ranges and rent is set at 30% of the low end of each range (minus a utility allowance). Deductions for unreimbursed medical and child care expenses are streamlined so that expenses must meet a minimum threshold to be eligible for a deduction. Medical and child care deductions are provided at either the $2,500 or $5,000 level according to the amount of unreimbursed expenses.
Definition of Annual Income	1. Asset Income Calculation: Income from assets valued at $50,000 or less are excluded from the income calculation. Where household assets are valued at more than $50,000, CHA calculates and counts only the imputed income from assets using the market value of the asset and multiplying it by the CHA established passbook savings rate. CHA's passbook savings rate is determined consistent with HUD guidelines. 2. Annual income does not include the 1st 12 months of net income from operation of a business or profession, including any withdrawal of cash or assets from the operation of the business.

The following is a table of aggregate earned income of residents living in Public Housing/RAD/Former Public Housing. CHA began reporting aggregate earned income in FY13. The methodology used to calculate aggregate earned income has varied year-to-year. Differing methodologies combined with relocations resulting from RAD and Former Public Housing conversions may account for the large differences over the last five years.

AGGREGATE EARNED INCOME OF PUBLIC HOUSING/RAD/FORMER PUBLIC HOUSING HOUSEHOLDS		
Year	**Aggregate Earned Income**	**Difference (+/-)**
FY13	$24,632,853	
FY14	$25,384,099	+$751,246
FY15	$28,028,884*	+$2,644,785
FY16	$29,976,506*+	+$1,947,622
FY17	$33,676,381	+$3,699,875
FY18	$34,612,968	+$936,587
FY19	$39,608,880	+$4,995,912
FY20	$29,704,319	-$9,904,561
FY21	$33,603,894	+$3,899,575
FY22	$33,603,894	+$3,899,575

* Aggregate includes wages at three tax credit sites (LBJ, Jackson Gardens and Lincoln Way) that were not included in previous years.

+Aggregate includes RAD, LIPH and former public housing moving forward

Mixed Family Rent

Mixed families are families that include ineligible immigrants as well as citizens or eligible immigrant. CHA requires mixed families to pay 10 % more rent than they would pay if they were not a mixed family.

Households with Real Property and Significant Assets

Policies were implemented to ensure that households that own real property and/or who have significant assets do not qualify for admission or continued occupancy with CHA. In turn housing resources are provided to households that have no housing alternative resources and who do not have significant assets. Elderly and disabled households are exempt from this policy.

Households that meet the following criteria are not eligible for admission or continued occupancy:

1. Non-elderly/disabled households whose net assets exceed $100,000.

2. Households who have a present ownership in, and a legal right to reside in, real property that is suitable for occupancy as a residence. This policy will not apply in the following circumstances:

- A household member or members are unable to reside in the property because of domestic violence.
- The household is making a good faith effort to sell the property.
- The property is owned in a country where there is verifiable evidence that the household would face retribution or repression were they to return to the country where the property is owned.

IMPACT

The rent simplification hardship policy provides a safety net for households experiencing unanticipated, significant drops in income or increases in medical or childcare costs for which they are eligible for an income deduction. Below is a summary of hardship requests: In FY16 there were no applications for medical reasons and no rent burden applications. We have looked into but are not able to determine factors that may have contributed to this outcome.

HARDSHIP APPLICATIONS

Application Year (by Fiscal Year)	Applications Received	Public Housing	HCV	Hardship Granted	Hardships Not Granted
2007	3	3	0	1	3
2008	1	1	0	0	1
2009	7	6	1	2	5
2010	10	10	0	8	2
2011	2	2	0	2	0
2012	1	0	1	0	1
2013	4	0	4	4	0
2014	2	1	1	1	1
2015	5	3	2	4	1
2016	0	0	0	0	0
2017	4	1	3	3	1
2018	4	2	2	2	2
2019	4	2	2	0	4
2020	1	0	1	0	1
2021	1	1	0	1	0
2021	0	0	0	0	0
Total	**49**	**33**	**16**	**28**	**22**

FY22 HOUSEHOLDS TRANSITIONED TO HOMEOWNERSHIP OR MARKET RENT[2]

Program	Homeownership	Market rent	Total
Public Housing	0	0	0
RAD	3	12	15
Former Public Housing	1	5	7
Total	**4**	**17**	**22**

1. Covers CY 2022.
2. Counts are based on inputted end of participation (EOP) reason codes based on information from the household leaving CHA housing. CHA cannot verify if the household has purchased a home or moved into a market rent unit. While CHA would like to perform exit interviews, we are unable to determine if and when such a process could be instituted. At this time, the operations department is operating beyond capacity and has prioritized other administrative duties to better serve current residents.

FY22 COUNT OF MIXED RENT HOUSEHOLDS

Program	Mixed Rent
FPHC	9
LIPH	0
RAD	22
Total	**31**

CHANGES TO BENCHMARKS, BASELINE, METRICS

Recertification and interim time has increased as tax credit recertifications make up a larger share of recertifications. Additionally, CHA's Leased Housing Department now handles the Section 8 recertification. This estimate is now a combination of the Operations and Leased Housing Staff efforts. Data will be monitored to see if the metrics should be changed in light of this transition.

CE.2006.01 - Rent Simplification Program (RSP)/Public Housing

CE #1: Agency Cost Savings/PH/RAD				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Total cost of task in dollars (decrease).	Number of Recertifications Performed in FY06: 1,699 Number of Interims Performed in FY06: 563 Recertification Time: 1.5 hours Interim Time: .75 hours Staff Cost/hr: $33.70 **Total Cost of Task:** $100,122	Total Recertifications: 373 Total Interims: 839 Recertification time: 2.25 hours Interim Time: 2 hours Staff Cost/hr: $42.25	Total Recertifications: 216 Public Housing: 4 RAD: 159 Former Public Housing: 49 Total Interims: 2,990 Public Housing: 4 RAD: 1,526 Former Public Housing: 1,460 Recertification time: **2.25 hours** Interim Time: **2 hours** Staff Cost/hr: **$42.25** **Total Cost of Task**: $273,189 Public Housing: $1,099 RAD: $213,806 Former Public Housing:$144,062	No.
CE #2: Staff Time Savings/PH/RAD				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**

CE.2006.01 - Rent Simplification Program (RSP)/Public Housing

Total time to complete the task in staff hours (decrease).	Number of Annual Re-certifications Performed in FY06: 1,699 Number of Interims Performed in FY06: 563 Annual Recertification Time: 1.5 hours Interim Time: .75 hours **Total Time Spent on Task:** 2,971 hours	Total Time Spent on Task: 2,971	Total Recertifications: 216 Public Housing: 4 RAD: 159 Former Public Housing: 49 Total Interims: 2,990 Public Housing: 4 RAD: 1,526 Former Public Housing: 1,460 Recertification time: 2.25 hours Interim Time: 2 hours **Total Hours of Task**: 7,466 Public Housing: 26 RAD: 3,410 Former Public Housing: 3,030	No.
CE #3: Decrease in Error Rate of Task Execution/PH/RAD				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Average error rate in completing a task as a percentage (decrease)	Rent determination errors from a quality control audit in July 2013: 7%	16%	16%	Yes.
CE #5: Increase in Agency Rental Revenue/PH/RAD				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Rental revenue in dollars* (increase)	**Rental revenue collected in FY05**: $10,021,885 *Does not include deduction of insufficient funds. JP State, Putnam School, and Roosevelt Towers Mid-Rise are not included in the totals	Total: $13,117,333	Public Housing: $383,726 RAD: $4,256,104 Former Public Housing: $6,331,917 **Total rental revenue collected:** $10,971,747	No.
SS# 3: Increase in Positive Outcomes in Employment Status/PH/RAD				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**

CE.2006.01 - Rent Simplification Program (RSP)/Public Housing

Other: Full and/or Part-Time Employment	Total Public Housing households on March 31, 2014: 2,493 Total Public Housing households that experienced Full- or Part-Time employment status on March 31, 2014: 1,003	Total households: 2,358 Total households with earned income:1,174	Total households: 2,258 Employed Public Housing: 19 RAD: 569 Former Public Housing: 339 **Total Households employed full or part-time:** 931	Yes. Increase due to previously excluding households that both received TANF and had earned income.
	Percentage of Public Housing households that experienced Full-or Part-Time employment status on March 31, 2014: 40%	50%	**Percentage of households that experienced full or part-time employment**: 41%	No.
SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)/PH/RAD/				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Number of households receiving TANF assistance (decrease)	Households receiving TANF on March 31, 2013: 146	Total Households Receiving TANF: 101	**Total Households receiving TANF: 90** Public Housing: 2 RAD: 54 Former Public Housing: 34	Yes. HUD is requiring the use of this metric. CHA maintains that while leaving TANF is encouraged by Rent Simplification, it is misleading to track the metric using a Baseline and Benchmark approach, especially since exiting TANF is not a required outcome.
SS #8: Households Transitioned to Self Sufficiency/PH/RAD				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Number of households transitioned to self sufficiency (increase)	Households that left CHA public housing as a result of renting or purchasing a home in the private market in FY 13: 46	Total: 21	**Total: 22** Public Housing: 0 RAD: 15 FPH: 6	Yes. HUD is requiring the use of this metric and End of Subsidy (EOS) as the unit of measurement. CHA maintains that it is misleading to track this metric as part of this activity because it is not a required or intended outcome.
CHA Metric: Average Household Income/PH/RAD				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**

CE.2006.01 - Rent Simplification Program (RSP)/Public Housing

Average Earned Income of households affected by this policy in dollars	$26,810	Total: $34,594	**Total Average Earned Income:** $39,808 Public Housing: $33,826 RAD: $38,887 Former Public Housing: $42,593	Yes. The numbers are based on households that have earned income.
CHA Metric: Median Household Income/PH/RAD				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Median earned income of household affected by this policy in dollars.	$24,440	$26,592	**Total Median:** $32,718 Public Housing: $28,926 RAD: $38,887 Former Public Housing: $37,066	Yes. The numbers are based on households that have earned income.

NOT YET IMPLEMENTED ACTIVITIES

HC.2020.01 LADDER TO OPPORTUNITY

DESCRIPTION

The Ladder to Opportunity Program (LTO) provides participants who are ready to move on from Sponsor-Based Rental Assistance (HC.2008.03) with permanent housing assistance in project-based units and as-needed case management to ensure stability and promote self-sufficiency. This program will be a voluntary opportunity to transition for participants in our SBV program.

This initiative was approved in the FY20 Annual Plan.

UPDATE

CHA is still working out the logistics to launch this program.

TIMELINE

CHA is planning to implement this program in FY21.

EM.2014.02 - TRANSITION TO MARKET RENT/PUBLIC HOUSING

DESCRIPTION

Transition to Market Rent is a program that would provide financial support to households interested in moving out of public housing and into the private market. While public housing residents must have an income below 80% of AMI at the time of their acceptance into the Public Housing Program, CHA does not enforce an income limit during the tenancy period. Households with incomes at or above 100% of the Area Median Income (AMI) –as established by HUD – may be ready to successfully transition to the private rental market. Transition to Market Rent assists households that find a unit in Cambridge by paying for their first and last month's rent, and security deposit.

This initiative was approved in the FY14 Annual Plan.

UPDATE

Implementation of this activity will occur after the RAD transition is completed.

TIMELINE

Implementation of this activity will occur after the RAD transition is completed.

HC.2008.06 - CHANGE INCOME CALCULATION TO ALLOW USE OF PRIOR YEAR/HCV

DESCRIPTION

Prospective and past income may be used to calculate resident rents, especially for families with irregular or sporadic employment histories. For example, W-2s may be used as evidence of past family income when more detailed information is not available.

This initiative was approved in the FY08 Annual Plan.

UPDATE

No activity in the fiscal year. Metrics will be developed after policies are finalized and an impact analysis and public process have been completed in accordance with the MTW Agreement.

TIMELINE FOR IMPLEMENTATION

No timeline has been set for this activity at the present time.

HC.2008.04 - ALIGN INCOME DEDUCTIONS WITH FEDERAL PUBLIC HOUSING RENT SIMPLIFICATION DEDUCTIONS/HCV

DESCRIPTION

Similar to the medical and childcare deductions established in the Public Housing program, Housing Choice Voucher holders would adopt the same or similar deduction schedule in calculating annualized income for lease-up, interim recertification, and/or regular recertification. Currently, a household needs to show applicable expenses above $2,500 in one category (medical or childcare) to receive a deduction. Additional deductions may be applied depending on the expenses.

This initiative was approved in the FY08 Annual Plan.

UPDATE

No activity in the fiscal year Metrics will be developed after policies are finalized and an impact analysis and public process have been completed in accordance with the MTW Agreement.

TIMELINE FOR IMPLEMENTATION

No timeline has been set for this activity at the present time. The implementation of this activity would likely be aligned with other income calculation modification policies in the HCV program.

ACTIVITIES ON HOLD - NONE AT THIS TIME.

ACTIVITIES CLOSED OUT

PH.2010.01 - INTEGRATE NEAR-ELDERLY (58-59 YEAR OLD) INTO ELDERLY SITES' WAITLISTS.

REASON FOR CLOSING OUT INITIATIVE

Implementation of the present Form 50900 and the requisite standard metrics led to additional review of CHA's MTW activities. Pursuant to CFR (Definitions) 945.105, this policy does not require MTW authority. Current regulations allows any PHA to implement the same policy.

This initiative was approved in the FY10 Annual Plan and implemented in FY10. This activity is ongoing but was closed out as an MTW activity in FY14.

FINAL OUTCOME AND LESSONS LEARNED

Not applicable.

HC.2008.01 - IMPLEMENT REVISED PROJECT-BASED VOUCHERS IN COOPERATIVE EFFORT WITH CITY'S HOUSING TRUST FUND

REASON FOR CLOSING OUT INITIATIVE

This initiative was implemented for specific sites and with a finite number of PBAs (46) allocated. Both sites are completed.
This initiative was approved in the FY08 Annual Plan and implemented in FY08. This activity was closed out in FY14.

FINAL OUTCOME AND LESSONS LEARNED

The activity was successful. The site construction was completed and all 46 PBAs were issued for the site.

HC. 2007.01 - REVIEW OF ALTERNATIVE SUBSIDY APPROACHES

REASON FOR CLOSING OUT INITIATIVE

Implementation of the present Form 50900 and the requisite standard metrics led to additional review of CHA's MTW activities. Upon further examination, CHA determined that the activity is composed of four distinct programs (see below), each with its own distinct metrics. It is not a stand-alone policy and therefore we have closed it out. The following four programs originally fall under this policy.

1. Sponsor-based Voucher Program.
2. Family Opportunity Subsidy, now known as Pathways to Permanent Housing - Heading Home.
3. Career Family Opportunity - CFO (closed out)
4. Family Stability and Savings Plus Program (renamed Financial Stability and Savings Plus)

This initiative was approved in the FY07 Annual Plan and implemented in FY07. This activity was closed out in FY14.

FINAL OUTCOME AND LESSONS LEARNED

Not applicable.

PD.2000.01 - REQUEST FOR REGULATORY RELIEF FOR MIXED FINANCE

REASON FOR CLOSING OUT INITIATIVE

A HUD notice on streamlining mixed finance activities (PIH 2004-5) was issued on 04/09/04 and rendered this activity moot.

This initiative was approved in the FY00 MTW Plan, never implemented, and closed out in FY14.

FINAL OUTCOME AND LESSONS LEARNED

Not applicable.

PD.2008.01 - LIBERATING ASSETS

REASON FOR CLOSING OUT INITIATIVE

Implementation of the present Form 50900 and the requisite standard metrics led to additional review of CHA's MTW activities. Upon further examination, CHA determined that this activity is a component of the Public Housing Preservation Fund and not a stand-alone MTW activity. As a result, this activity has been combined and collapsed into HC.2010.01 Public Housing Preservation Fund.

This initiative was approved in the FY08 Annual Plan and implemented in FY8. This activity is ongoing but was closed out as a stand-alone MTW activity in FY14.

FINAL OUTCOME AND LESSONS LEARNED

Not applicable.

PH.2013.02 - PROJECT-BASED VOUCHER IN PUBLIC HOUSING

REASON FOR CLOSING OUT INITIATIVE

Implementation of the present Form 50900 and the requisite standard metrics led to additional review of CHA's MTW activities. Upon further examination, CHA determined that this activity is a component of the Public Housing Preservation Fund and not a stand-alone MTW activity. As a result, this activity has been combined and collapsed into HC.2010.01 Public Housing Preservation Fund.

This initiative was approved in the FY13 Annual Plan and implemented in FY13. This activity is ongoing but was closed out as a stand-alone MTW activity in FY14.

FINAL OUTCOME AND LESSONS LEARNED

Not applicable.

SS.2013.02 - WORK FORCE SUCCESS INITIATIVE - MATCHED SAVINGS COMPONENT

REASON FOR CLOSING OUT INITIATIVE

Implementation of the present Form 50900 and the requisite standard metrics led to additional review of CHA's MTW activities. Upon further examination, this policy does not require MTW authority.

This initiative was approved in the FY13 Annual Plan and implemented in FY14. This activity is ongoing but was closed out as an MTW activity in FY14.

FINAL OUTCOME AND LESSONS LEARNED

Not applicable.

SS.2011.01 - CAREER FAMILY OPPORTUNITY PROGRAM (CFO)

REASON FOR CLOSING OUT INITIATIVE

Given the reductions in federal funding, CHA could not continue to provide the administrative funding to cover the program staff and related administrative costs.

This initiative was approved in the FY11 Annual Plan and implemented in FY11. This activity was closed out in FY14.

SUMMARY TABLE OF OUTCOMES

	BASELINE	FY11	FY12	FY13
NUMBER OF HOUSEHOLDS ADMITTED	0	10	17	3
AVERAGE INCOME OF ENROLLEES	$19,849	$19,849	$19,595	$22,000
MEDIAN INCOME OF ENROLLEES	$15,000	$15,000	$18,616	$12,100
MEDIAN HOUSEHOLD ASSETS OF ENROLLEES	N/A	N/A	UNAVAILABLE	$3,000

FINAL OUTCOME AND LESSONS LEARNED

CHA and CWU (non profit partner) recognized that there is continued difficulty in recruitment and a different referral and intake process is required for CFO. The tough economy has also played a factor in the earning expectations for the families and it seems more likely that while overall participants can show improvement in many areas (including increases in income and savings) they are unlikely to achieve self-sufficiency (that is subsidy-free) within the five year timeline envisioned in the original program design.

CE.2008.05 - IMPLEMENT NEW INSPECTION PROTOCOL/HCV

YEAR CLOSED OUT: FY15

REASON FOR CLOSING OUT INITIATIVE

This activity was closed out because Federal Register/Vol. 79, No. 122/Wednesday, June 25, 2014/Rules and Regulations has rendered this activity a standard practice across all PHAs. Therefore, this activity no longer requires any MTW authority.

SUMMARY TABLE OF OUTCOMES

	BASELINE (FY08)	FY14	FY15
TOTAL COST OF TASK IN DOLLARS (DECREASE)	$152,956	$30,722	$102,608
TOTAL TIME TO COMPLETE TASK IN STAFF HOURS (DECREASE)	3,822	1,415	1,350
AVERAGE ERROR RATE IN COMPLETING A TASK AS A PERCENTAGE (DECREASE)	not available	not available	not available

FINAL OUTCOME AND LESSONS LEARNED

This was a successful activity that HUD adopted for all PHAs. This activity continues to be in place at CHA.

CE.2006.01 - RENT SIMPLIFICATION PROGRAM (RSP)/HCV

Utility Allowance: CHA applies the smaller of the unit size and voucher size to calculate the utility allowance.

YEAR PARTIALLY CLOSED OUT: FY16

REASON FOR CLOSING OUT THIS PORTION OF THE INITIATIVE:

This activity was closed out because the 2014 Appropriations Act has rendered this activity a standard practice across all PHAs. Therefore, this activity no longer requires any MTW authority.

ACTUAL SOURCES AND USES OF MTW FUNDING

Actual Sources and Uses of MTW Funding for the Fiscal Year

PHAs shall submit their unaudited and audited information in the prescribed FDS format through the Financial Assessment System - PHA (FASPHA), or its successor system

Describe the Activities that Used Only MTW Single Fund Flexibility

CHA will continue to exercise full fungibility across programs, Asset Management Projects (AMPs) and if necessary the COCC, at any time throughout the fiscal year. Amendment 1 Section F. 2. f. provides for full authority to move funds among projects. CHA believes that continued fungibility as described above is permitted.

TRANSFERS TO PROGRAM AND ACTIVITIES USING THE BLOCK GRANT

CHA uses the block grant fund to move MTW and other funds, including but not limited to fee-for-service fees, central maintenance fees, unrestricted admin fees earned, management fees, and development fees across program funding streams and into particular activities or initiatives. The block grant is the fund that most expresses CHA's use of the Single Fund Flexibility provided by the MTW agreement.

Money in the block grant is generally used in the following targeted ways:

Transfers to property operations (both State and Federal) to offset shortfalls in operating subsidy.
Transfers in support of other State programs like the Massachusetts Rental Voucher Program (MRVP) where the Federal funds supplement State funds for rental assistance (a State version of Section 8).
Transfers in support of a working capital fund for the planning and analysis needed to redevelop properties (see Working Capital section).
Transfers in support of planning and development staff that cannot be charged to a specific capital project (especially in the planning phase prior to the project closing).
Transfers to make capital contributions, loans or grants, and guarantees for the redevelopment of properties.
Transfers to a property for extraordinary maintenance needs.
Transfers in support of a specific resident services program or initiative, such as the Workforce Program.
Transfers in support of a "working capital" fund for policy development, internships, evaluations, and other costs associated with the planning, refinement, implementation, and evaluation

WORKING CAPITAL

<u>Inclusion of Full Capital Funding Plan (CFP) Data on Each AMP Budget</u>
Planning + Development single fund flexibility has been exercised for predevelopment and administrative costs related to capital projects. Given the fungibility of work items under CFP and CHA's 5-year plan, the CHA capital plan is extensive and comprehensive. In order to plan, develop private investment opportunities and address local issues such as planning and zoning, CHA believes that it is in its best interest to not budget capital soft costs by AMP. Instead, CHA has created a pool of working capital funds based on all planned capital work for the fiscal year.

CHA's Planning and Development Department will draw against this pool to cover pre-rehabilitation and/or pre-development costs such as financial consulting, legal, architectural or engineering fees and viability assessments. As the need arises, CHA also intends to charge pre-development administrative costs to this pool. As work progresses, CHA will collapse costs into the capital budget for a specific project, and then track soft costs by AMP. However, not all costs may be AMP-based. In the event a project is deferred or infeasible, CHA at its discretion, can choose to leave those costs in the common pool and not charge them to a project. For projects that go forward, financial statements at year-end will reflect all capital expenses incurred by AMP. Costs charged to the working capital pool are a direct cost to the pool and once a project goes forward will be considered a direct cost to a specific project. In the event CHA receives a developer fee it will reserve the option to charge the fee back to the pool or the AMP where the capital project was completed.

Amendment 1, Section F. 2. b. and c., requires that costs be accorded consistent treatment. The model proposed above comports with Amendment 1 in that the working capital pool can be considered a direct cost for pre-development expenses. Once under-way, costs to the extent possible, can be shifted or considered a direct cost to a project.

Policy + Technology
The Policy + Technology Lab utilizes single fund flexiblity to carry out MTW-related policy-making, research, and the funding of interns, fellows, and other academic support and consultant services.

CAPITAL PROJECTS - GUARANTEES AND TRANSFERS

Single fund flexibility has been exercised to pledge certain portions of our funding to meet investor requirements and to pay for capital projects. These projects may range from major capital improvements (e.g. elevators) to small capital improvements to large-scale portfolio changes such as the Rental Assistance Demonstration (RAD) program.

Local Asset Management Plan

Has the PHA allocated costs within statute during the plan year?	No
Has the PHA implemented a local asset management plan (LAMP)?	Yes

If the PHA is implementing a LAMP, it shall be described in an appendix every year beginning with the year it is proposed and approved. It shall explain the deviations from existing HUD requirements and should be updated if any changes are made to the LAMP.

Has the PHA provided a LAMP in the appendix?	Yes

CERTIFICATION: MTW REPORTING COMPLIANCE

A. CHA was not required to take additional actions as a result of HUD reviews, audits or physical inspection issues.

B. CHA has not received any result from any Agency-directed evaluations of the MTW demonstration.

In the interest of maintaining a consistent methodology that complies with HUD requirements under Attachment B, please see data points on **required in Section II.** CHA certifies the following: -

C. CHA has met the three statutory requirements:
   a. At least 75% of the families assisted by CHA are very low-income families.
   b. CHA assisted substantially the same total number of eligible low-income families as would have been served had the amounts not been combined.
   c. A comparable mix of families (by family size) are served, as would have been provided had the amounts not been used under the demonstration.

D. N/A.

ADMINISTRATIVE

LOCAL ASSET MANAGEMENT PLAN

FY20 Update

CHA is in compliance with the asset management/operating fund rule requirements set by HUD. LAMP has been implemented and has consistently been followed year-to year. Because of the flexibility allowed by CHA's MTW Agreement, some activities do not readily translate into fiscal policy choices that meet all of the stipulated provisions of the Asset Management rule. In accordance with Amendment 1 of the Amended and Restated Moving to Work Agreement, CHA has instituted a Local Asset Management Plan. Below key differences from the HUD guidelines are outlined:

SINGLE FUND FLEXIBILITY

CHA will continue to exercise full fungibility across programs, Asset Management Projects (AMPs) and if necessary the COCC, at any time throughout the fiscal year.

Amendment 1 Section F. 2. f. provides for full authority to move funds among projects. CHA believes that continued fungibility as described above is permitted.

TRANSFERS TO PROGRAM AND ACTIVITIES USING THE BLOCK GRANT

CHA uses the block grant fund to move MTW and other funds across program funding streams and into particular activities or initiatives. The block grant is the fund that most expresses CHA's use of the Single Fund Flexibility provided by the MTW agreement.

Money in the block grant is generally used in the following targeted ways:

1. Transfers to property operations (both State and Federal) to offset shortfalls in operating subsidy.
2. Transfers in support of other State programs like the Massachusetts Rental Voucher Program (MRVP) where the Federal funds supplement State funds for rental assistance (a State version of Section 8).
3. Transfers in support of a working capital fund for the planning and analysis needed to redevelop properties (see Working Capital section).
4. Transfers in support of planning and development staff that cannot be charged to a specific capital project (especially in the planning phase prior to the project closing).
5. Transfers to make capital contributions, loans or grants, and guarantees for the redevelopment of properties.
6. Transfers to a property for extraordinary maintenance needs.
7. Transfers in support of a specific resident services program or initiative, such as the Workforce Program.
8. Transfers in support of a "working capital" fund for policy development, internships, evaluations, and other costs associated with the planning, refinement, implementation, and evaluation of MTW initiatives or business systems changes that can lead to cost savings.

WORKING CAPITAL

INCLUSION OF FULL CAPITAL FUNDING PLAN (CFP) DATA ON EACH AMP BUDGET

Planning + Development single fund flexibility has been exercised for predevelopment and administrative costs related to capital projects. Given the fungibility of work items under CFP and CHA's 5-year plan, the CHA capital plan is extensive and comprehensive. In order to plan, develop private investment opportunities and address local issues such as planning and zoning, CHA believes that it is in its best interest to not budget capital soft costs by AMP. Instead, CHA has created a pool of working capital funds based on all planned capital work for the fiscal year.

CHA's Planning and Development Department will draw against this pool to cover pre-rehabilitation and/or pre-development costs such as financial consulting, legal, architectural or engineering fees and viability assessments. As the need arises, CHA also intends to charge pre-development administrative costs to this pool. As work progresses, CHA will collapse costs into the capital budget for a specific project, and then track soft costs by AMP. However, not all costs may be AMP-based. In the event a project is deferred or infeasible, CHA at its discretion, can choose to leave those costs in the common pool and not charge them to a project. For projects that go forward, financial statements at year-end will reflect all capital expenses incurred by AMP. Costs charged to the working capital pool are a direct cost to the pool and once a project goes forward will be considered a direct cost to a specific project. In the event CHA receives a developer fee it will reserve the option to charge the fee back to the pool or the AMP where the capital project was completed.

Amendment 1, Section F. 2. b. and c., requires that costs be accorded consistent treatment. The model proposed above comports with Amendment 1 in that the working capital pool can be considered a direct cost for pre-development expenses. Once under-way, costs to the extent possible, can be shifted or considered a direct cost to a project.

POLICY + TECHNOLOGY

The Policy + Technology Lab utilizes single fund flexiblity to carry out MTW-related policy-making, research, and the funding of interns, fellows, and other academic support and consultant services.

CAPITAL PROJECTS - GUARANTEES AND TRANSFERS

Single fund flexibility has been exercised to pledge certain portions of our funding to meet investor requirements and to pay for capital projects. These projects may range from major capital improvements (e.g. elevators) to small capital improvements to large-scale portfolio changes such as the Rental Assistance Demonstration (RAD) program.

COCC FEES

CHA makes every effort to reduce the burden on the property budgets. The management fee is $65 per eligible unit month. (HUD allowable maximum rate is $72.10). The book keeping fee is at the standard allowable rate of $7.50 per unit month. Asset management fees are retained at cash flowing properties at $10 per unit month. With the onset of RAD conversions and transitioning our model to accomodate these conversions, some properties may have a fee structure as a percent of revenue.

PENSION + OTHER POST EMPLOYMENT BENEFITS (OPEBS)

CHA is in compliance with the Generally Accepted Accounting Principles (GAAP) and Statement No. 45 of the Government Accounting Standards Board (GASB) in its treatment of postemployment benefits (OPEB) expenses and liabilities. Project-based budgeting and accounting is the cornerstone of the Asset Management Program. It appears to CHA that HUD is deviating from this principle by requesting that liabilities related to OPEB for all employees are charged to COCC (from the date of Asset Management implementation forward).

CHA will use its MTW authority to charge OPEB to AMPs and only charge the COCC for the portion directly related to COCC staff. CHA believes this supports the requirements of a true Asset Management Program. Costs should stay where they are incurred (i.e. direct charges and liabilities to the AMPs should remain at the AMPs in order to accurately represent the true cost of running these projects). In addition, since OPEB is excluded from the excess cash calculation, reflecting it under each AMP has no adverse impact on excess cash. Asset management calls for a project level accounting. CHA's methodology supports true project level accounting.

GROSS POTENTIAL OPERATING SUBSIDY

While HUD is planning to mandate the reporting of gross potential subsidy on each AMP, CHA's MTW Agreement does not call for calculation of subsidy by AMP. HUD Form 52723 as submitted by CHA is not AMP-driven at the subsidy level and our fungibility through MTW allows cross-funding of subsidy. CHA thus finds the calculation and reporting of gross potential subsidy inconsequential within an MTW program that has full fungibility. CHA's position is in line with Attachment A to the MTW Agreement which outlines CHA's subsidy computations.

RESIDENT SERVICE EXPENSES

While HUD has encouraged costs associated with resident services to be treated as direct or front line costs, to the extent practical, CHA is now budgeting Resident Services at the site level as a shared cost including some overhead for the Tenant Liaison position.

FEES EARNED FOR AGENCY SERVICES

CHA has established a fund derived from fees earned by the agency for services rendered on non-public housing transactions, to be utilized for purposes consistent with the CHA's mission as determined by the Board of Commissioners and Executive Director.

PUBLIC COMMENTS

Note: no public comments received from the public for FY22 report.

BOARD APPROVAL

EXTRACT OF THE MINUTES OF THE SPECIAL MEETING OF THE BOARD OF COMMISSIONERS OF THE CAMBRIDGE HOUSING AUTHORITY WEDNESDAY, APRIL 5, 2023 5:30 P.M.

MEMBERS PRESENT: ELAINE DEROSA, CHAIRPERSON
LOUIS BACCI, VICE-CHAIRPERSON
SUSAN T. CONNELLY, TREASURER
GERARD J. CLARK, MEMBER
VICTORIA BERGLAND, MEMBER

ALSO PRESENT: MICHAEL JOHNSTON, EXECUTIVE DIRECTOR
BRENDA DOWNING, DEPUTY EXECUTIVE DIRECTOR
NICHOLAS DESOUZA, RECORDING SECRETARY

Approval of Submission of the FY22 MTW Annual Report

Ms. Connelly moved to approve the following:

MOVED: Approve the Moving To Work Deregulation Demonstration Program FY22 Annual Report;

MOVED: Authorize any technical corrections and changes to the document including any information that would be helpful to address public comments received on the draft Report; and

MOVED: Authorize the submission of the final Report to the US Department of Housing and Urban Development, pursuant to the March 29, 2023 Memorandum from Zach Gordon to Michael J. Johnston, Executive Director.

Ms. Bergland seconded the motion which upon being put to vote, was **passed unanimously**.

Michael Johnston, Executive Director