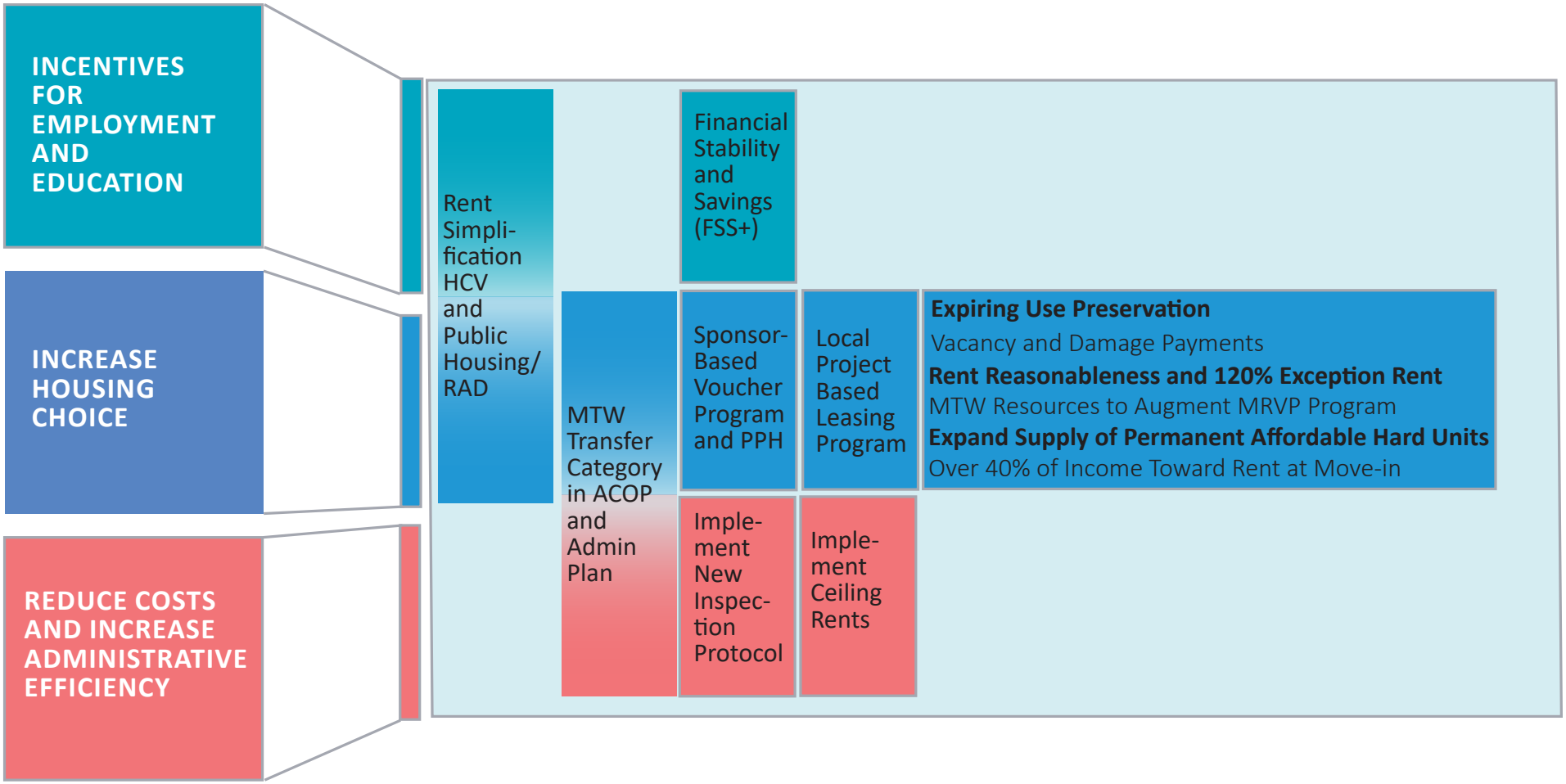
CAMBRIDGE HOUSING AUTHORITY

MOVING TO WORK

CHA

ANNUAL REPORT 2023

January 1, 2023 - December 31 , 2023



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 2023

JANUARY 1, 2023 TO DECEMBER 31, 2023

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

- Nearly 22,000 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 project-based subsidies under HUD's Rental Assistance Demonstration (RAD) and Section 18 Disposition, with the aim of converting our full portfolio before the end of FY24. The department also provides third party property management services to the YWCA of Cambridge and the Belmont Housing Authority.

COMPREHENSIVE WAITLIST UPDATE

In an effort to maintain an up-to-date applicant pool and ensure efficient housing placement, we collaborated closely with Edgemere Consulting Corporation along with our Leased Housing department to execute a combined, comprehensive update of all 22 of our active site-based waitlists (SBWLs).

This initiative took place in Summer 2023. It involved sending out a one-page letter to 7,945 applicants on the SBWLs that had not yet begun the screening process, and requested a response by a date over a month in the future or be removed from the waitlists. The applicants were given the option to respond online via a unique QR code included on the document, or by physically returning the letter to us via mail or by dropping it off at our Central office. The letter was also emailed to those who provided their email address to CHA. The project resulted in the removal of 3,660 inactive applicants, significantly advancing those in urgent need of the affordable housing administrated by our agency.

Through this process, we aimed to identify and remove individuals who are no longer interested or eligible for housing assistance, enabling us to focus on those still in genuine need of housing support in addition to streamlining our resources. By periodically conducting these updates, we not only improve the accuracy and effectiveness of our waitlists but also expedite the housing placement process, ultimately providing better service to our community.

CONTINUED RAD RELOCATION

Relocation efforts will continue throughout FY24 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 may continue beyond 2024. 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.

Additionally, the relocation team has been actively collaborating with the Medford Housing Authority (MHA) since Spring 2022. During this period, they initiated relocation moves for Saltonstall, totaling 89 moves for MHA to date since 2022. In 2023 alone, 43 moves were conducted at Saltonstall, which comprises approximately 200 elderly disabled units. The team is presently commencing relocation efforts at Walkling Court, another MHA property featuring around 140 one-bedroom elderly/disabled units. The team also began work with Lexington Housing Authority (LHA) in early 2023, successfully completing 35 moves in the same year at Vynebrook Village. These moves were in conjunction with kitchen and bath renovations for approximately 48 one-bedroom elderly/disabled units.

PROPERTY MANAGEMENT SOFTWARE CONVERSION

The Operations department began its conversion from Emphasys Elite software to Yardi Voyager in FY21, opening a floodgate of enhanced processes. One among many is our ability to dispatch work orders to maintenance team members in the field remotely via a CHA provided tablet or on a smartphone. The team member can receive the work, take pictures of items that require follow-up, and report what's been done, which results in less paper being used; which is an advantage not limited to maintenance, but several other key processes in our day-to-day property operation. We also benefit from enhanced reporting thanks to the new software.

FOOD SECURITY PROGRAMS

Through the Operations department CHA has partnered with local food banks, meal service providers, and a local restaurant, Café Luna, to provide food resources at no cost to residents. Café Luna has generously provided meals to residents at some developments for our elderly residents monthly since 2019. We also coordinate food deliveries to our disabled and elderly residents, especially those who are unable to leave their homes due to health concerns.

SAFETY AND SECURITY

Public Safety is a complex topic, to which the CHA takes a multi-layered approach. Providing a safe environment for our residents requires tremendous effort and coordination between our many partners. We are proud to work alongside the City of Cambridge, the Cambridge Police Department, Cambridge Fire Department, MDS Security, and Transition House. We also recognize the valuable contribution that all our property managers, maintenance staff and resident tenant councils make in working together to provide a safe living environment for all residents to enjoy.

Here is a list of accomplishments relative to safety and security made in 2023:

Ten (10) AED devices were purchased and installed in our elderly buildings.

In conjunction with the Cambridge Fire Department and the Cambridge Police Department, over one hundred (100) Cambridge Housing Authority employees were trained in the use and application of the AED device, how and when to apply Narcan to an overdose individual plus basic life supporting CPR training.

In May 2023, the Cambridge Fire Department reviewed and revised the CHA's Fire & Evacuation Procedures for our elevator buildings, which was last updated in 2016.

In June 2023, approximately seventy-five (75) CHA employees received and participated in Active Shooter Training at the Pisani Center.

Cambridge Police performed over two thousand five hundred (2500) "park and walks" on CHA properties in 2023. This action is when an officer is dispatched to a property location on a random patrol to look for safety issues at CHA's request.

In 2023, our Public Safety Administrator:

Conducted over thirty (30) light inspections of Housing Authority properties with the housing managers.

Participated in monthly Zoom meetings with the Cambridge police to discuss various issues of safety on CHA properties.

Assisted the Cambridge Police in approximately forty-five (45) requests for assistance throughout 2023.

Attended nine (9) evening meetings listening to residents' concerns. Also in attendance at the meetings were officers from the Cambridge Police Outreach Unit.

LEASED HOUSING

The Leased Housing Department continued to manage all of CHA's Federal and State voucher programs including the Housing Choice Voucher Tenant-Based Voucher program (TBV), the Project Based Voucher program (PBV), the Single Room Occupancy program (SRO), the Veteran's Affairs Supportive Housing Program (VASH), Non-Elderly Disabled voucher programs (NED) – including Mainstream 5-year and 811 Mainstream, the Emergency Voucher Program that was allocated in 2021 and a variety of vouchers funded by the Commonwealth of Massachusetts, including the Alternative Housing Voucher Program (AHVP), the Massachusetts Rental Voucher Program (MRVP), and the Department of Mental Health Rental Assistance subsidies (DMHRA). Using its MTW flexibility, CHA also administers a Sponsor-Based Voucher Program to local agencies who provide shelter and supportive services to hard-to-house individuals, as well as an Expiring Use Preservation program that has preserved over 2,100 units of affordable housing in and outside of Cambridge.

In FY 2023, the leased housing department completed screening applicants for and issuing all the allocated 128 Emergency Housing Vouchers that we received in 2021. In partnership with the Cambridge Continuum of Care, CHA was able to successfully house 128 EHV participants by the end of 2023. The leased housing department, during 2023, continued to screen applicants and issue Mainstream Vouchers to improve utilization of this resource. The third selection from our waiting list for these vouchers seemed to improve our success rate. Our third selection included applicants who were on our mobile list as well as an expansion of applicants who were non-elderly disabled but on waiting lists for units in our elderly properties. Our Mainstream utilization has improved in 2023 from 73% (January 2023) to 80% (December 2023) and based on the number of Mainstream vouchers issued, we anticipate hitting 90% in 2024.

Although we had intended to complete updating and revising our Administrative Plan in FY 2023, we intentionally paused this while we waited for final guidance on HOTMA. With most of the guidance being released toward the end of 2023, CHA resumed our process and we will have an updated and revised Administrative Plan out for public comment and anticipated Board of Commissioners approval in 2024.

CHA implemented operational changes to how Section 8 assistance is administered at CHA-owned RAD and Former Public Housing (FPH) properties who have converted from traditional Public Housing to a Section 8 funding platform in early 2022. With this transition through the first full year, the staff spent 2023 working on refining some processes and conducted some more training, but overall, recertifications are being completed on-time at a higher rate than before, payments are being made timely and with the coordination of Leased Housing and Operations staff working closely together, any HAP discrepancies are being addressed timelier.

In an effort to improve the filling of vacant units in both Project Based Assistance (PBA) program and the CHA owned units, as well as to prepare for future selections from our Tenant Based waiting list, the CHA processed a Waiting List update in the summer of 2023 after successfully using this process to update the CHA elderly housing waiting lists in late 2022. We sent letters to all households, on the tenant-based waiting list and the various site-based waiting lists (both PBA and CHA owned units), who indicated they had a Cambridge Preference. We mailed update requests to 6,166 applicants who fit this criteria. Of the 6,166 applicants sent the update request - 3,135 applicants responded and requested to remain on the list(s) they had applied to and 3,031 applicants did not respond and were removed from the waiting list(s). All applicants removed from the list for failure to respond were given a six (6) month period to contact the CHA and be reinstated to their original application date. At the end of 2023, we planned out the final phase of the waiting list update and in early 2024, 16,000 applicants who have not claimed a Cambridge preference will be sent an update request.

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. CHA has initiated a new committee with CLPHA, PHADA, NAHRO, and the NYC Housing Development Corporation to strategize on furthering the SAVE Act's progress in Congress, now being led by Congressman Ritchie Torres of NY and Senator Kirsten Gillibrand.

Local Legislative Reform

CHA has continued to work with EOHLC, CHAPA, and MassNAHRO to address technical issues that have made the use of the construction procurement relief previously passed by the legislature more complex than necessary. CHA will follow progress of the current proposed bond bill, entitled the Affordable Homes Act, with the hope that these corrections will be adopted by the legislature as part of the bill.

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 is following HUD implementation of Faircloth to RAD, and coordinating with other agencies to seek clarification of a number of provisions as they relate to MTW agencies.

Reasonable Accommodation

CHA has a robust reasonable accommodation program. In the last year, CHA's Reasonable Accommodation Officer/Senior Program Manager processed over 376 individual cases. Of those, 2 were appealed to an independent appeals officer, and 2 decisions were upheld. Rashida Jolly, the CHA's ADA/504 Coordinator, has conducted 9 reasonable accommodation trainings for CHA departments internally and 1 training for external service providers.

Tenancy Preservation

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. To that end, the legal department has been participating in meetings with other departments, particularly operations and executive, to achieve this.

Governor's Council Against Sexual Assault and Domestic Violence - Housing Stability and Self-Sufficiency Working Group

CHA contributed its experience to the working group as it relates to best practices in working with survivors. The group developed a housing search guide specifically designed for advocates that work at DV agencies and select state employees. Two trainings were offered based on this guide. The first training was held at the end of December and the second will be held at the end of January. Both groups had approximately 75 people register. The group is still planning to host additional trainings in the future for state agencies, housing authorities and MassNAHRO directors.

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 and conducted a city-wide needs assessment to determine responsiveness from Cambridge service providers as it relates to DV disclosures. The information gathered from this assessment will be used to re-evaluate the needs of survivors and to figure out how to respond to these needs via our programming. The group is currently on hiatus as a search is conducted for a new leader (the former group leader transitioned into a different role). CHA is continuing to partner with Transition House to develop/implement ways to improve responsiveness when a resident discloses DV. Transition House resumed walk-in hours at CHA's main office on January 9th. Additionally, Transition House will be conducting a staff training for CHA employees in March.

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

CHA continued work with a graduate intern focused on Accessory Dwelling Units (ADUs) as a potential affordable housing tool. Work has continued on previously proposed projects on homesharing and better understanding the impact of Small Area Fair Market Rents on voucher success rates. Ideally, these will be projects that can be further studied with the help of an intern. The PTLab has also begun early work on thinking about how to present CHA data under the newly proposed MTW Plan and Report format.Additionally, the PTLab continues to work on the Plan and Report and the coordination of the public process for those documents.

HUMAN RESOURCES

Our agency remains dedicated to offering safe, deeply affordable housing even as we navigate the complexities of today's challenging staff retention market. In response, we have maintained a robust workforce, prioritizing hiring and retention strategies within our Human Resources department to support our agency's staffing needs. A significant milestone in this journey has been the successful roll-out of "Aspire," our tailored learning management system designed to enhance staff proficiency with the recently implemented Yardi property management software. This system is pivotal in offering asynchronous staff training and development opportunities, marking a key investment in our team's growth.

We continue to foster a diverse and inclusive workplace, prioritizing open communication and valuing every team member. Our aim is to reflect the diversity of the communities we serve in and around Cambridge, reinforcing our commitment to understanding and meeting their housing needs effectively.

BUSINESS SYSTEMS

Throughout 2023, the Information Technology department took time to evaluate current operations and workflows. Through these efforts, we successfully implemented a number of changes which have impacted staff and residents, often behind the scenes.

For example, our department has been working hard to ensure a fully digital workflow for workorders. With operations, maintenance, fiscal and IT departments on the same page, repairs and maintenance happen timely and accurately. All maintenance staff are equipped with tablets and dedicated software to handle work orders and communicate in the field.

The IT department is in the process of modernizing the CHA network infrastructure. This updated infrastructure includes an end-to-end look at internet service, wireless coverage, how staff communicates with CHA systems, and includes capacity to enhance video surveillance systems across CHA sites. We are ensuring that behind the scenes CHA staff will deliver reliable and secure services for our tenants. In 2023, five sites completed the update to the new networking standard.

With another behind the scenes look, you will find that the department has worked diligently to improve CHA's cybersecurity posture. Throughout the year, IT was able to standardize and modernize dozens of configuration policies which not only enhance device management, but also simplify user experience. Policies and reporting have also been enhanced, along with all CHA staff completing updated security awareness training.

With dozens of irons entering the fire in 2023, the IT department expects 2024 to be an especially productive and fruitful year, and we look forward to providing our next update.

RESIDENT SERVICES

EXPANSION OF WORK FORCE POST-SECONDARY SUCCESS INITIATIVE

In FY 24, the Resident Services Department will be seeking additional funding partners to support the expansion of critical mental health, and college degree attainment and career development supports in the Work Force Program's ongoing Post-Secondary Success Initiative (PSSI).

A key driver in the Work Force Program's recent success in positioning "first gen" graduates to secure their degrees within five years at reduced debt has been the multi-faceted Post-Secondary Success Initiative. Key elements of the initiative – essentially three interrelated components -- were instituted sequentially over a four-year period, starting in 2014. First, an Alumni Coach supports program seniors and their families in the college application, choice, and matriculation process, and provides "coaching for persistence" to graduates over the course of their college experience. In addition, a Career Development Specialist works in tandem with the Alumni Coach to provide individualized support to our college juniors and seniors to enhance their post-college career and employment opportunities. Lastly, the initiative supports an innovative College Matched Savings Program, which seeks to habituate in students strong saving and credit-building habits and to assist them in securing money – through program jobs and a creative menu of monetized incentives geared to program performance – to defray post-secondary education costs. Student savings over three years, with a ceiling of $1500, are matched 1:1 as students prepare to matriculate.

The Post-Secondary Success Initiative has demonstrated strong matriculation, persistence, and completion outcomes for our graduates: despite the enduring presence of Covid, the 2016 through 2018 classes averaged at 92% matriculation rate, and 68% completed their degrees in five years (with 68% graduating from four-year colleges; 20% completing two-year programs; and 12% completing specialized certificate programs). While this graduation rate is well above the national average for low-income students (roughly a third graduate within six years), our goal is to reach or exceed a 75% degree-attainment rate within five years of participants' graduation from high school and the core Work Force program.

Over the coming year, the Resident Services Department seeks to build capacity into PSSI by adding a second Alumni Coach and increasing our current Mental Health Consultant position from part-time to a full-time position. With two Alumni Coaches, a Career Development Specialist, and a Clinician working as a team, we can build out the infrastructure of the initiative to increase broad-based support to students, staff, and families through both direct and indirect services.

The proposed capacity-building will also serve as a catalyst to enhance our Alumni Career Connection program. With the successful Work Force Program's infrastructure serving as a backdrop, we plan to greatly expand our career supports program to help alumni attain meaningful employment opportunities within six months of completing their degrees. While the bulk of this work will focus on guiding graduate to find their own employment opportunities that provide a living wage, we are also investing considerable energy into developing work and training partnerships that will provide additional career pathways for alumni as they finish their college degrees. We remain focused on developing 21st Century jobs with clear career ladders that enhance opportunity for sustained mobility, for example, in the Biotech, Healthcare, Education, and Information Technology fields.

PROPERTY MANAGEMENT TRAINING CERTIFICATE PROGRAM

In collaboration with Cambridge College, the CHA has been designing a free 10-month property management training program for current CHA residents. The certificate will require six months of relevant coursework (broken into a series of modules), along with a specialized Foundations of Property Management course that the CHA is designing with a team at Cambridge College.

After successful completion of the coursework, participants will be placed in paid internships at CHA developments, where they will learn the nuts-and-bolts of managerial responsibilities from assigned CHA staff. Participants will have the option of completing the paid internships (400 hours) on a part-time or full-time basis, over a maximum of four months. Upon completion of the fully subsidized certificate program, recipients will be placed in CHA Assistant Manager positions (or the equivalent) for a committed period of two years; at the end of the period, participants may continue as employees of the CHA's Operation or Leasing and Occupancy Departments or can pivot to management positions in the private sector.

Over the summer, we will be fine-tuning the eligibility, application, and mentor support protocols for the program. Our goal is to publicize the program and to recruit 3-5 participants to form the first cohort over the course of the fall, with the aim of launching the program in January of FY24. Both the City of Cambridge and Somerville Housing Authority have shown initial interest in the proposed training program as a potential model for expansion and replication.

CONTINUED GROWTH OF THE RESIDENT SERVICES EMPOWERMENT ENDOWMENT

Our consistent record of fundraising for departmental programs and partnerships has only been bolstered by the addition of a Resident Services Empowerment Endowment Fund. Formalized in October of 2021, the fund is managed by the Cambridge Community Foundation. Since its inception, we built the fund to $1.6 million from $750,000 in a donor's seed contribution.

In the coming fiscal year, we intend to sustain the momentum generated over the past year of focused fundraising by continuing to expand our base of private donors, and by conducting a fundraising event at an individual donor's house (the first since the onset of Covid) this coming fall. The centerpiece of this fundraiser will be the launch of a new promotional video comprised of interviews with Work Force graduates who have completed their post-secondary degrees and secured initial jobs in fields with a family sustaining wage and strong opportunities for career advancement.

Our goal is to reach the $2 million mark by the end of 2023. Given our strong performance since the formal launch of the endowment, earlier this year, our seed donor committed to providing the final $125,000 in match once we reach the $1,875,000 plateau. Our long-term goal is to grow the endowment to between $3 and $5 million to ensure a sizeable annual interest yield that will not only provide additional general operational support for Work Force but will afford us greater latitude in bringing future innovations to fruition.

PLANNING AND DEVELOPMENT

In 2023, CHA administered over $175 million of large-scale construction projects across four properties: Putnam School, 116 Norfolk Street and Jefferson Park Fed in Cambridge, and Saltonstall in Medford. Expenditures on these and smaller projects totaled over $26.2 million on construction activities in Cambridge, and over $38.2 million in total including work outside of Cambridge. In addition to overseeing construction activities, CHA has over $800 million in redevelopment and new development projects in the planning phase, with $550 million of those projects located in Cambridge and $250 million of those projects located outside of Cambridge.

In addition to the construction and planning activity, CHA serving as a co-developer with the Medford Housing Authority closed on one financial transaction totaling over $141 million in 2023. With this closing, CHA has closed on over **$1.2 billion dollars** in financing to improve and expand public housing since 2010, allowing it to preserve 2,371 units and create 112 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	$20,331,093
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	$9,358,501
Roosevelt Tower	112	Dec-19	$59,858,381
78-80 Porter Road	26	Jan-20	$18,430,715
Burns Apartments	198	Feb-20	$95,442,521
Truman Apartments	59	Dec-20	$35,191,924
Putnam School*	34	Dec-21	$20,641,020
116 Norfolk Street*	62	Dec-22	$48,452,920
Saltonstall Apartments*[1]	222	May-23	$141,714,452
Total	**2,371**		**$1,200,966,238**

*Locations of new units

CHA has funded over $665 million in construction on Cambridge properties since 2010 including over $275 million since 2020. Despite these accomplishments, Cambridge Housing Authority's construction efforts continue to be affected by the residual impact of the COVID-19 pandemic. There continues to be labor shortages, supply chain disruptions, and increased project costs (from inflation and higher interest rates). CHA and its myriad of partners have worked hard to mitigate these impacts, and despite the challenge, have continued to progress construction activities through these challenging times. Since 2020, CHA's construction expenditures have totaled $276 million, or approximately $69 million annually, which significantly exceeds the 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.

A summary of these 2023 major construction activities is provided below.

Large Scale Construction Projects – Cambridge

Putnam School – Total Construction Contract of $13.58 million; $7,691,252 spent in 2023

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

1 CHA is co-developing with the Medford Housing Authority Saltonstall Apartments, which was a federally-assisted public housing development that was converted as part of the financing to the project-based voucher program. CHA initially served as MHA's development consultant before becoming its co-developer partner.

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 2024.

The $13.58-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. The project is currently 91% complete and is expected to reach substantial completion in February 2024.

In 2023, construction expenditures totaled $7,691,252.

116 Norfolk Street Revitalization/New Construction – Total Construction Contract of $32.36 million; $8,840,080 spent in 2023

CHA secured private activity bonds from MassDevelopment to allow for it to close on the $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 for 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 affordable housing units. CHA is using available federal public housing subsidy through its Faircloth Authority to add these new units to its portfolio as provided by the U.S. Department of Housing and Urban Development. After construction, there will be 62 studios at 116 Norfolk.

It is important to highlight that 116 Norfolk will be the CHA's first 100% Permanent Supportive Housing development. All 62 units are reserved for unhoused individuals transitioning out of homelessness. CHA has partnered with Eliot Community Human Services to provide robust onsite social and medical services to support residents. See Housing and Health for more information.

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 2023, $8,840,080 was spent on construction activities.

Jefferson Park Demolition and Site Preparation – Total Construction Contract of $23.7 million; $7,627,322 spent in 2023

CHA has secured private activity bonds from MassHousing to allow for it to close on the $170-million financing of the Phase 1 new construction planned for Jefferson Park Federal. 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 once Phase 2 is completed 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 of the Phase 1 project in Spring 2024 with construction of the new buildings starting immediately thereafter. Phase 2 is expected to close in 2025. Units are expected to be ready for lease up in late 2025 through 2026. This specific contract is readying the site for the Spring 2024 construction start by funding the demolition of the existing buildings and site preparation costs.

In 2023, construction expenditures totaled $7,627,322.

Large Scale Construction Projects – Outside of Cambridge

CHA currently has one active construction project outside of Cambridge. CHA is serving as a co-developer, as well as providing Owner's Project

Management/Construction Oversight services. Details on that project are provided below.

Saltonstall Apartments, Medford MA – Total Construction Contract of $106.5 million; $7,691,252 spent in 2023

CHA has been working with the Medford Housing Authority (MHA) since 2020 on the Revitalization of Saltonstall Apartments. CHA's first task was to assist MHA in securing HUD's approval to convert Saltonstall Apartments from the federal public housing program to the Section 8 project-based voucher program. Once HUD's approval was secured in early 2022, CHA assisted MHA through the design and bidding process, culminating in the award of a construction contract to Consigli Construction Company. The project closed on its financing in May 2023 with full construction proceeding immediately. The project is scheduled to be completed in October 2025.

The project's scope of work is similar to the scope of work completed by CHA at Truman and Burns Apartments, except for the addition of 22 new 1-BR units that are being added by claiming underutilized space on each residential floor. More specifically, the scope of work includes new heating, cooling, and ventilation systems; new plumbing and electrical systems; addition of new structural lateral braces; new building envelope and windows to eliminate water and air infiltration; and new building finishes, including new bathrooms, kitchens, and interior finishes.

Summary Major Construction Activity in 2023

The chart below summarizes the construction expenditure activity in 2023 by CHA project.

Site	Units After Construction	2023 Expenditure	Status
Cambridge Projects			
Putnam School	34	$7,691,252	Construction started in December 2022; to be completed in February 2024.
116 Norfolk Street	62	$8,840,080	Construction starting in January 2023; to be completed in October 2024.
Jefferson Park Demo and Site Preparation	278	$7,627,322	Construction started in June 2023, and will be completed in Spring 2024
Subtotal- Cambridge	**379**	**$24,158,654**	
Outside of Cambridge Projects			
Saltonstall, Medford	222	$14,091,152	Full construction started in May 2023, to be completed in Fall 2025
Subtotal- Outside of Cambridge	**222**	**14,091,152**	
Grand Total	**601**	**$38,249,806**	

Smaller Scale Construction Projects

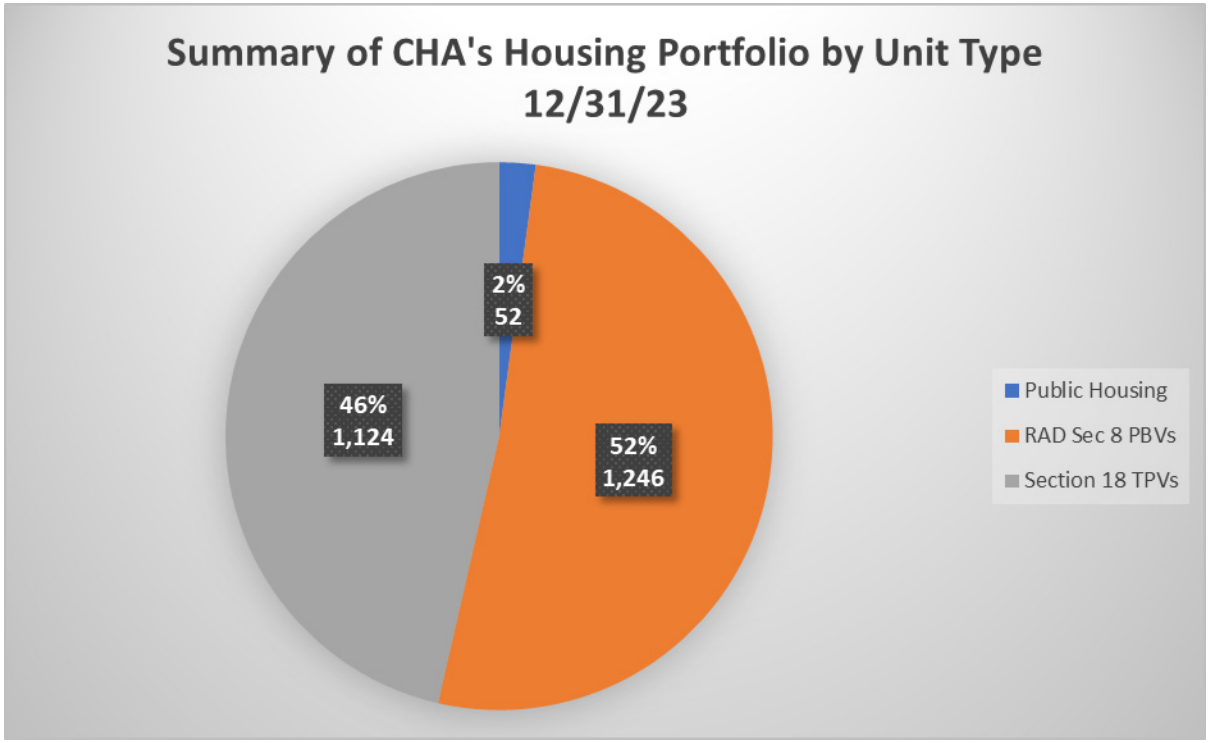
The Planning and Development Department also oversees smaller modernization and renovation projects in the portfolio. In 2023, funds were expended on the following projects:

Project Name	Contract Amount as Amended	Expenditures in 2023
Hingham St Exterior Modernization – Roof and window replacement, exterior improvements – COMPLETED IN 2023	$575,637	$463,887
45 Linnaean Street – Phase 1 Window System Replacement Project – WORK AWARDED IN 2022; COMPLETED IN 2023	$98,500	$86,173
15 Inman Street- Roof Replacement – WORK AWARDED IN 2022; AND COMPLETED IN 2023	$206,796	$206,796
15 Inman Street- Exterior Refurbishment- WORK AWARDED IN 2023; TO BE COMPLETED IN 2024	$490,435	$251,917
Jefferson Park State Bi-Directional Antenna Installation- WORK AWARDED IN 2022; COMPLETED IN 2023	$415,000	$415,000
Washington Elms – Renovation of Fire Damage Unit – WORK AWARDED IN 2022; COMPLETED IN 2023	$395,882	$395,882
Lincoln Way – Deck Repairs - WORK AWARDED IN 2022; COMPLETED IN 2023	$25,000	$25,000
Putnam Gardens – Fencing Upgrade – WORK AWARDED IN 2023 WITH FINAL PAYMENT TO OCCUR IN 2024	274,950	$179,688
River Howard – Exterior Painting (Building D only) – WORK AWARDED IN 2023 AND COMPLETED IN 2023	$25,000	$25,000
Roosevelt Towers- Gas Line Replacement – WORK AWARDED IN 2023 WITH FINAL PAYMENT TO OCCUR IN 2024	$77,000	$59,327
Total	$2,584,200	$2,108,670

There was not any conversion activity of CHA's federally-assisted housing in 2023. The last conversion activity occurred in December 2022 when CHA closed on a RAD/Section 18/Faircloth transaction for 116 Norfolk.

The three remaining federally-assisted public housing properties in CHA's portfolio are: 45 Linnaean Street, Weaver Apartments, and the two small buildings 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

As noted earlier, CHA anticipates closing on the financing with MassHousing for Phase 1 of the Jefferson Park Reconstruction in Spring 2024, with Phase 2 scheduled to close in Spring 2025. The project has been fully designed, zoning is in-place, a contractor hired, and equity and debt financing secured.

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.

Corcoran Park

In 2023, given the long queue of projects awaiting tax credits, CHA received from HUD an extension to the deadline to start construction at Corcoran

Park for a few more years. Despite the extension, CHA is moving forward with plans to redevelop the Corcoran Park site given systemic issues with site settlement, site drainage, and general obsolescence. In the last quarter of 2023, CHA renewed its outreach to residents to engage them in the planning of the site's redevelopment, as well as some interim repairs. 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 structures that contain property management offices, a community room, and maintenance storage. Consultations with the Corcoran Park residents will continue in 2024 and will expand to include the neighbors and the City of Cambridge as the CHA looks to utilize the Affordable Housing Overlay (AHO) to add additional units to the Corcoran Park site. CHA anticipates completing the AHO process in late 2024 or early 2025, allowing the A/E firm to finalize design documents so a contractor can be hired in time for a late 2025 financial closing if there are available private activity bonds. An existing conditions study and feasibility options have been completed. CHA anticipates that it may be necessary to modernize 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 recently completed and submitted a Green and Resilient Retrofit Program application seeking $60,000 per unit in funding to fund improvements in energy and sustainability at the site. While that application is under review, CHA will be issuing a Request for Proposal in early 2024 to hire an A/E firm for the project.

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. Unfortunately, after an extensive study by one of its house doctors, CHA determined that a ramp could not be constructed on the site given site constraints. CHA is continuing to work to identify a program that can use the property or obtain state approval to convert the building into 2 two-bedroom accessible apartments. We are working to finalize and implement a plan in the first quarter of 2024 with the hope it will allow us to move forward with the planned purchase and conversion.

Private Activity Bonds

In 2023, CHA did not close on any private activity bond transactions for its Cambridge projects, and only one for its outside of Cambridge projects: Saltonstall in Medford, MA. For 2024, CHA is forecasting one additional project: Phase 1 Redevelopment of Jefferson Park Federal. CHA anticipates two additional private activity bond transactions in 2025. CHA's efforts to move projects forward both within Cambridge and for our partner housing authorities have been stymied by the high demand for Private Activity Bonds in Massachusetts. In 2024, MassDevelopment had 27 projects ready to close

and could only close on 10, delaying 17 projects, including Medford's Walkling Court project by at least a year.

Other Notable 2023 Accomplishments

Outside Consultancy Services

CHA's outside consultancy services continue to grow in scale and accomplishment in 2023. During 2023, CHA worked with nine housing authorities. Some of the major accomplishments have been:

Medford/Saltonstall: Serving as the co-developer and co-guarantor, CHA assisted Medford Housing Authority (MHA) on all aspects of the financial closing related to the $142-million revitalization of Saltonstall Apartments. The project will not only address systemic issues from water infiltration and structural concerns, but also extend the life of the building by 50 years with new building systems and finishes. The project will see an increase of 22 units in the building by reorganizing some underutilized spaces. The project closed on its financing in May 2022, with construction completion anticipated by October 2025. CHA, in addition to serving as co-developer and co-guarantor, is also providing the MHA with Owner's Project Management and Relocation Assistance services.

Medford/Walkling Court: In 2023, CHA assisted MHA in securing two grants from the Commonwealth of Massachusetts' Executive Office of Housing and Livable Communities totaling $14.3 million to support the redevelopment of a 144-unit state public housing development. These new funds are in addition to the $15 million previously awarded the project. The project also received an additional $1.6 million in Community Preservation Act (CPA) funding. CHA has also been assisting MHA in overseeing the A/E firm for the Walkling project, which includes the replacement of the 144-units and the addition of 98 units. CHA has also assisted in securing the debt and equity financing needed for the project to proceed. The project's design documents are nearly complete, and zoning should be approved by the end of February 2024. A June 2024 financial closing/construction start had been anticipated, but due to the heavy demand for private activity bonds in Massachusetts an early 2025 start date is now expected.

Brockton: CHA previously assisted Brockton Housing Authority (BHA) in securing a Section 18 disposition of its Campello development due to its extensive physical conditions needs, and the hiring of an A/E firm and construction manager. CHA successfully prepared a funding application, which received approximately $2.8 million in funds from the Commonwealth of Massachusetts' Executive Office of Housing and Livable Communities through its Housing Works program. The redevelopment's scope of work includes construction of new units to replace obsolete, poor-quality units. CHA is assisting BHA in the design and financing of the project. We are currently targeting early 2025 for construction to begin, but construction could be delayed due to the long queue for private activity bonds.

Needham/Linden and Chambers Redevelopment: CHA has been assisting Needham Housing Authority (NHA) in oversight of the A/E firm hired to complete a master plan to replace 152 units of obsolete state public housing. The A/E's master plan would replace the units with approximately 230 units in two phases. CHA is currently working with NHA and the A/E to obtain the zoning relief to allow the project to proceed, which will require the approval of Town Meeting in May 2024. Additionally, CHA is applying for funds to move forward with Phase 1 of the Master Plan which would replace 72 units with 136 units. Funding efforts will ramp up once the zoning for the planned redevelopment is in place. CHA is currently in negotiations with NHA to serve as the developer on this project.

Needham/Federal Repositioning: CHA assisted NHA in hiring an A/E firm to move forward with a RAD/Section 18 blended transaction for the 76 units comprising Needham's Seabeds and Captain Robert Cook developments. A RAD/Section 18 blended transaction would allow NHA to move forward with much-needed, deferred capital work while also creating some Faircloth authority for its state redevelopment plan. The A/E firm has completed the existing conditions and master plan phase of their work and will be moving on to schematic design in the upcoming months. CHA also completed a RAD application

that Needham submitted in November 2023. CHA is currently in negotiations with NHA to serve as the developer on this project.

Belmont: We have completed a feasibility study for one development, Sherman Gardens, an 80-unit state public housing development serving elders and persons with disabilities. The existing, obsolete units would be replaced by new construction, and 55 new deeply affordable units would be added to the site. CHA is presently negotiating with the Belmont Housing Authority (BHA) serve as the developer on this project. We continue to seek pre-development funding for the project. In 2023, CHA secured $450,000 in Community Preservation Act funding and helped steer approximately $100,000 in HOME funding to the project. Work on a feasibility study for a second BHA-owned site, Belmont Village, which is a 100-unit state family public housing development, is ongoing.

Lewiston, ME: CHA assisted on Maine Housing and FHLBB funding applications for the Martel School site. We also continue to provide as needed assistance with Capital Fund program assistance.

Watertown: CHA continues to assist in design and funding applications related to the construction of a new five-bedroom Special Needs Housing home in East Watertown. We 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: In 2023, CHA continued to assist Sudbury Housing Authority (SHA) in assessing the potential purchase of a parcel of land that is constrained by wetlands and endangered wildlife species. CHA found that the parcel had development potential and recommended some additional due diligence be performed after securing an option on the property. Further CHA work on this task is on hold while SHA determines how it would like to proceed. In addition to working on that parcel assessment, CHA is providing SHA with comprehensive predevelopment services for the redevelopment of four obsolete single-family homes that are scattered-site, state-assisted public housing for families. CHA assisted SHA with a preliminary grant application to the Executive Office of Housing and Livable Communities' Public Housing Innovations program that would replacing the single-family homes four deeply affordable duplexes. The State approved the preliminary application, allowing SHA to submit a final application for $1.2 million in capital funding and four project-based voucher, which CHA is drafting. CHA also drafted an application for Community Preservation Act funding for SHA. In 2024, CHA will lead efforts to hire an A/E for the project.

Haverhill: CHA staff assisted the Haverhill Housing Authority (HHA) on developing an application for scattered-site, state-assisted public housing (Chapter 705) repositioning that received $3.5 million in state funding. The plan would have HHA develop 37 new units of housing, with 10 of the new units serving as replacement units for the ten 705 units that need significant work. HHA would transfer those 10 units to an affiliated LLC and rehabilitate them using Section 8 project-based vouchers. CHA is now assisting HHA in the early stages of the project implementation, including the possibility of selecting a development partner for the 37-unit new development project. We continue to provide HHA with technical assistance and support on their recent acquisition of a four-unit dwelling, which they hope to convert to an eight-unit dwelling, including the recent drafting of an application for HOME/ARPA funding.

Lexington: CHA's relocation team is providing relocation assistance to Lexington Housing Authority (LHA) as it completes a kitchen and bathroom and handicapped improvement modernization project at one of its state-assisted public housing properties. Additionally, CHA's P&D team has prepared a Section 18 disposition application for LHA's 17 scattered-site federal public housing units. CHA is under contract with LHA to assist with the disposition of those units, as well as review repositioning options for the remaining 60-unit development.

Revere: CHA is developing a federal repositioning plan for the Revere Housing Authority. In 2023, it provided board and staff training on repositioning options, and secured the services of an A/E firm to prepare existing conditions reports. With the existing conditions reports nearing completion, CHA will be able to complete its review and make its recommendation as to which repositioning option iare optimal for the Revere portfolio. CHA will also assist Revere as it moves forward with its repositioning activity.

MassHousing Municipal Technical Assistance: The CHA has been prequalified by MassHousing to provide technical assistance under MassHousing'a Planning for Housing Production Program. To date, we have been selected to provide services to two communities as noted below.

Springfield – CHA is working with a small developer, Renaissance Development, to revitalize the historic Kavanagh Building near downtown Springfield. The project will renovate a vacant structure and revitalize a historic neighborhood that has experienced disinvestment. The project would create 36 new units of permanent supportive housing, as well as 10,000 square feet of retail space. CHA is assisting in developing the project proforma, securing project-based rental assistance, developing a management plan and procuring management services for this project, and completing financial closing due diligence.

Pittsfield – CHA is working with the nonprofit Westside Legends to evaluate potential funding sources for an affordable or mixed-income homeownership and/or rental development in the Westside neighborhood of Pittsfield. The scope of services could expand to include assistance with funding applications.

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), and Millers River (300 households). In 2023, the CHA procured a Vendor, Stock Pot Malden, to prepare fresh, quality, and healthy meals for residents out of the commercial kitchens at each aforementioned property. Through congregate meals and food-related programming like cooking classes, the fresh meals 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. The fresh meals program is launching in 2024. Stock Pot Malden, the meals vendor, will be responsible for sourcing fresh ingredients, operating the commercial kitchens, and preparing and serving fresh meals daily at each site.

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. Construction at 116 Norfolk is on schedule with lease up expected to lease up in October 2024. In early 2024, the CHA will work closely with Eliot and the City of Cambridge to identify individuals to move into 116 Norfolk in order to execute a timely lease up as soon as construction is complete.

Lastly, in 2020, the CHA launched a partnership with Boston Medical Center and Cambridge Health Alliance to provide a Community Wellness Coordinator and Community Wellness Nurse (RN) at Manning Apartments. The partnership has been an excellent success for residents. In 2023, the CHA researched how to expand the partnership to other developments with the goal of expanding the program in 2024 and 2025 to other elderly sites. The Community Wellness Team (CWT) works closely with the CHA's Resident Services team in order to expand resources for residents to support their ability to age in place.

The Community Wellness Team provides consultation on healthcare including attending appointments with residents and translating medical information when requested, medication management, transportation access, and connection to doctors, rehab, and health specialists. Over the past 3 years, the CWT have conducted multiple outreach efforts and developed an active rapport with residents, enrolling over 100 residents in the program who they interact with frequently and assist with coordinating health care as well as managing their day-to-day needs. The CWT is called upon regularly to help residents navigate and manage the issues with which they find challenging in order to continue living in the CHA community independently. Residents' individual needs vary greatly, and the CWT has established relationships with the various organizations throughout the healthcare system, as well as throughout the community, in order to best serve our residents. Over the past three years they have worked directly with Somerville Cambridge Elder Services, Commonwealth Care Alliance, the Cambridge Council on Aging, the CHA PACE Program, The Cambridge Health Alliance Primary Care and Surgical Specialties Departments, the Cambridge Public Health Department, both the Cambridge Fire and Police Departments, various Boston healthcare systems, the Mass RMV, the Social Security Office, local VNA services, Healthcare for the Homeless, and various other community agencies.

Some specific examples of the CWT's work are listed below:

They see a number of residents for weekly blood sugar and blood pressure checks. The information collected is shared with providers prior to appointments which has resulted in the successful regulation of hypertension and diabetes for these residents. Additionally, they are called upon by providers to collect and communicate vital signs while medications are actively being adjusted.

They coordinated with the Cambridge Public Health Department in planning an onsite influenza vaccine. By taking an active part in notifying and identifying residents who were interested in receiving the influenza vaccine, they were able to double last year's 400 percent participation increase. We were able to vaccinate 80 residents on-site in 2022, as compared to only 7 residents prior totheir initial involvement.

They conducted medication reconciliation for an 86 year old resident who had prescriptions being filled from two different pharmacies, resulting in the patient receiving more than a double dose of medication daily. Through communication with the residents' PCP, as well as with the pharmacy, they were able to reconcile the medication list and dispose of medications being given in error.

They have worked directly with the Nutritionist from Cambridge Public Health to establish an ongoing program which provides user friendly information about how to affordably identify, purchase, store and prepare healthy snacks and meals.

They regularly provided resident assistance with the disposal of expired and discontinued medications.

They work regularly with the CHA PACE Program and assist with both identifying candidates as well as assist with the enrollment process. They have established a working relationship with this service provider and often collaborate with them on how to better serve resident needs.

They have assisted several clients with finding affordable prescription programs resulting in an increase in medication compliance and successful health management.

They assist several clients with filling pillboxes on a regular basis. They are also called on by family members to take on this role temporarily when said family members are away or unavailable. This often includes picking up residents' prescriptions from the pharmacy when family members cannot.

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ENERGY AND SUSTAINABILITY

2023 proved to be somewhat challenging for CHA's energy program. On the positive side, the cumulative benchmarks from the most recent modernization

projects (Burns, Millers River, Roosevelt Towers family units, Truman, and Manning) have resulted in a 26% reduction of carbon emissions, a 45 % reduction in utility spending, and a 60% reduction in water consumption. Time and time again, CHA has experienced significant water savings when able to complete comprehensive modernizations replacing ageing water supply pipes, eliminating leaks, and improving water pressure within the building allowing installation of low flow fixtures.

All six of these properties (877 units) are certified under the Enterprise Green Communities program, and residents have experienced significant lifestyle upgrades supportive of increased health and wellbeing. However, two of the referenced properties require more analysis and possible re-commissioning to review why energy consumption is a bit higher than expected. CHA management staff have recently been trained on the Building Management Systems and are performing regular review of the buildings digital thermostat reporting, as we continue to work to identify other possible improvements to building operations.

CHA's Planning and Development departments have continued to make progress with the remainder of CHA's portfolio. Both 116 Norfolk Street and Putnam School are in in construction with full modernization and electrification of their HVAC plants. 116 Norfolk will include a rooftop solar array which is currently in the design stage. Construction of the 278 units at Jefferson Park will commence in 2024, under the Enterprise Green Communities certification program, and most notably CHA's first Passive House construction. Jefferson Park is designed as an all-electric building with exception of a gas fired hot water plant which is designed for conversion to electric hot water as technology progresses. Jefferson Park will feature a significant roof top solar array as CHA continues to work on our goal of 20% of electricity generated on site at our properties.

CHA's operations department has been busy coordinating unit energy audits across the portfolio in partnership with Boston ABCD's LEAN (Low-income Energy Affordability Network). The program completed 669 unit audits at Washington Elms, Newtowne Court, Jackson Gardens and LBJ Apartments. During these visits, the LEAN program exchanged over 2,000 lightbulbs, retrofitted hundreds of stove hoods from Halogen to LED lighting and began the planning work for retrofitting the common area and exterior lighting at Jackson Gardens and LBJ Apartments. The apartment audit cycle had been halted for over two years during the pandemic and we are pleased to be back on cycle with more buildings planned for 2024.

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 12/31/2023[1]	Total Households on 12/31/2023	HH Demo graphics	MTW Local Non Tradi-tional	MTW Family and Bedroom size	Notes
Public Housing Elderly/Disabled		40	40	40			Linnean (20), Weaver (20)
Public Housing Family		12	12	12			Roosevelt Towers (12)
RAD Elderly/Disabled		448	437	437	0	437	Manning Apartments (198), LBJ Apartments (177), JFK Apartments (44 RAD) , 116 Norfolk St (29)
RAD Family		834	840	840		840	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	539	539		539	Millers River (297), Burns (198) Russell (51), Truman (59) , 116 Norfolk (8), Saint Paul (5), Elderly Condos (5)
Former Public Housing Family		572	468	365		365	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**	**2,336**	**2,233**			**92 % Occupancy.** Occupancy affected by RAD conversion and Section 18 Disposition.
MTW Tenant Based			4,186	4,327	0	4,327	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 12/31/2023[1]	Total Households on 12/31/2023	HH Demo graphics	MTW Local Non Tradi-tional	MTW Family and Bedroom size	Notes
Sponsor-based/ Local Non-Traditional		137	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**	**4,323**	**4,597**			**106%**	**Utilization Rate.**
Federal Non-MTW		832	811	811	N/A	N/A	Voucher allocation includes Mainstream, VASH, DHVP/NED, Mod Rehab , Emergency Housing Vouchers, and Shelter + Care.
ALL FEDERAL VOUCHERS		5,155	5,408	N/A	N/A	N/A	Does not include relocation or RAD/FPLI
ALL FEDERAL ASSISTED		**7,491**	**7,641**				**102% 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		143	132	131	N/A	N/A	Voucher funding includes MRVP , AHVP, Shelter Care .
STATE AND LOCAL ASSISTED		**252**	**206**			**82%**	**Utilization**
TOTAL ASSISTED		**7,743**	**7,847**			**101%**	**Utilization**

HOUSEHOLD DEMOGRAPHICS

MTW HARD UNITS AND VOUCHERS
HOUSEHOLDS SERVED - DECEMBER 31, 2023

								MTW HCV HOUSEHOLDS[3]		
	PUBLIC HOUSING ELDERLY	RAD FAMILY	RAD ELDERLY	FORMER PUBLIC FAMILY	FORMER PUBLIC ELDERLY	TOTAL[3]	PERCENT	HOUSE HOLDS	PERCENT	TOTAL
UNIT SIZE										
0 BR	27	0	83	0	0	110	5%	201	5%	311
1 BR	11	161	342	46	535	1,095	49%	1,830	42%	2,925
2 BR	12	370	12	178	4	576	26%	1,498	35%	2,074
3 BR	0	242	0	125	0	367	16%	667	15%	1,034
4+ BR	0	67	0	16	0	83	4%	131	3%	214
TOTAL HOUSEHOLDS	50	840	437	365	539	2,231	100%	4,327	100%	6,558
RACE										
American Indian	0	4	2	1	3	10	0%	16	0%	26
Asian	1	56	34	23	27	141	6%	551	13%	692
White	29	240	220	112	309	909	41%	1,848	43%	2,757
Black/African American	20	534	175	225	196	1,150	52%	1,899	44%	3,049
Native Hawaiian/Other Pacific	0	6	6	4	5	21	1%	11	0%	32
TOTAL HOUSEHOLDS	50	840	437	365	539	2,231	100%	4,327	100%	6,558
ETHNICITY										
Hispanic	1	141	38	56	60	296	13%	849	20%	1,145
Non-Hispanic	49	699	399	309	479	1,935	87%	3,476	80%	5,411
TOTAL HOUSEHOLDS	50	840	437	365	539	2,231	100%	4,327	100%	6,558
INCOME[2]										
At 30 AMI or below	38	491	394	193	464	1,580	71%	3,259	75%	4.839
Over 30 AMI – 50 AMI	7	191	41	97	63	399	18%	748	17%	1,147
Over 50 AMI – 60 AMI	1	54	1	24	8	88	4%	164	4%	252
Over 60 AMI – 80 AMI	2	47	1	30	2	82	4%	124	3%	206
Over 80 AMI	2	57	0	21	2	82	4%	32	1%	114
TOTAL HOUSEHOLDS	50	840	437	365	539	2,231	100%	4,327	100%	6,558
CAMBRIDGE RESIDENT										
Cambridge	50	840	437	365	539	2,231	100%	2,369	55%	4,600
Outside Cambridge	0	0	0	0	0	0	0%	1,958	45%	1,958
TOTAL HOUSEHOLDS	50	840	437	365	539	2,231	100%	4,327	100%	6,558

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.
3. Both demographic charts may have a total is off a few households in race/ethnicity. Some households have unkown race/ethnicity.

FEDERAL NON-MTW, NEW CONSTRUCTION AND STATE
HOUSEHOLDS SERVED - DECEMBER 31, 2023

	NEW CONSTRUCTION[1]		FEDERAL NON-MTW		STATE		
	HOUSEHOLDS	PERCENT	HOUSEHOLDS	PERCENT	HOUSEHOLDS	PERCENT	TOTAL
UNIT SIZE							
0 BR	3	4%	130	16%	56	42%	189
1 BR	58	80%	495	61%	40	30%	593
2 BR	12	16%	140	17%	21	16%	173
3 BR	0	0%	36	4%	15	11%	51
4+ BR	0	0%	10	1%	1	1%	11
TOTAL HOUSEHOLDS	73	100%	811	100%	132	100%	1,017
RACE							
American Indian	0	0%	10	1%	3	2%	13
Asian	3	4%	13	1%	4	3%	20
White	36	50%	447	55%	62	47%	545
Black/African American	34	46%	339	42%	63	48%	436
Native Hawaiian/Other Pacific	0	0%	0	0%	0	0%	2
TOTAL HOUSEHOLDS	74	100%	811	100%	132	100%	1,017
ETHNICITY							
Hispanic	7	11%	101	12%	20	15%	128
Non-Hispanic	66	89%	710	88%	112	85%	888
TOTAL HOUSEHOLDS	74	100%	811	100%	132	100%	1,017
INCOME[2]							
At 30 AMI or below	56	77%	664	82%	109	83%	829
Over 30 AMI – 50 AMI	11	15%	112	14%	16	12%	139
Over 50 AMI – 60 AMI	3	5%	16	2%	5	4%	24
Over 60 AMI – 80 AMI	1	1%	13	2%	1	1%	15
Over 80 AMI	2	3%	6	1%	2	2%	10
TOTAL HOUSEHOLDS	73	100%	811	100%	132	100%	1,017
CAMBRIDGE RESIDENT							
Cambridge	73	100%	385	47%	123	93%	581
Outside Cambridge	0	0%	426	53%	10	8%	436
TOTAL HOUSEHOLDS	73	100%	811	100%	132	100%	1,017

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	110	3	15.4%	2.7%
Elderly Condos	5	4	1	20.0%	20.0%
J.F. Kennedy	44	43	2	4.5%	4.7%
Linnaean Street	24	18	6	16.7%	22.2%
L.B. Johnson Apartments	178	168	14	7.9%	8.3%
F.J. Manning Apartments	205	200	26	12.7%	13.0%
Millers River Apartments	301	136	26	8.6%	19.0%
R.C. Weaver Apartments	20	20	8	40.0%	40.0%
Roosevelt Midrise	77	77	16	20.1%	21.1%
Saint Paul Residence	21	21	8	38.1%	38.1%
L.J. Russell Apartments	52	50	5	9.8%	10.0%
GRAND TOTAL	**1,259**	**939**	**120**	**9.0%**	**12.0%**

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 21,991 distinct applicants that generated 192,958 applications or an average of over 8.7 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	2,555	Elderly/Disabled	5,301	
	CHA Units Family	10,225	Family	25,244	
	HCV Elderly/Disabled	2,746	Single Room Occupancy (SRO)	1,763	
21,991	HCV Family	15,019			**192,958**
	Single Room Occupancy (SRO)	1,763			
	Total	32,308	Total	32,308	

CHA WAITLISTS BY - DISTINCT APPLICANTS IN EACH PROGRAM GROUP – BY RACE AND ETHNICITY – DECEMBER 31, 2023

	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	39	2%	203	8%	888	35%	33	1%	1,373	53%	21	1%	398	16%	2,159	84%	1	0%	2,558
CHA UNITS FAMILY	146	1%	542	5%	5,307	52%	169	2%	3,722	36%	345	3%	2,842	28%	7,124	70%	266	3%	10,232
HCV ELDERLY/DISABLED	62	2%	154	6%	1,048	38%	34	1%	1,413	52%	22	1%	475	17%	2,256	83%	3	0%	2,734
HCV FAMILY	251	2%	550	4%	8,598	57%	299	2%	5,195	35%	132	1%	3,988	27%	11,037	73%	2	0%	15,027
SINGLE ROOM OCCUPANCY (SRO)	36	2%	64	4%	874	49%	32	2%	745	42%	17	1%	331	19%	1,436	81%	1	0%	1,768
TOTAL	**534**	**2%**	**1,513**	**5%**	**16,715**	**52%**	**567**	**2%**	**12,448**	**39%**	**537**	**2%**	**8,034**	**25%**	**24,012**	**74%**	**273**	**1%**	**32,319**

CHA WAITLISTS BY - DISTINCT APPLICANTS IN EACH PROGRAM GROUP – BY INCOME – DECEMBER 31, 2023

	$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]	279	11%	1,932	76%	270	11%	30	1%	34	1%	13	1%	2,558
CHA UNITS FAMILY[2]	1,401	14%	6,942	68%	1,527	15%	190	2%	127	1%	45	0%	10,232
HCV ELDERLY/DISABLED	305	11%	2,213	81%	181	7%	19	1%	9	0%	7	0%	2,734
HCV FAMILY	1,508	10%	11,131	74%	2,094	14%	166	1%	85	1%	43	0%	15,027
SINGLE ROOM OCCUPANCY (SRO)	433	24%	1,016	57%	251	14%	34	2%	22	1%	12	1%	1,768
TOTAL	**3,926**	**12%**	**23,234**	**72%**	4,323	**13%**	**439**	**1%**	**277**	**1%**	**120**	**0%**	**32,319**

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 FY14-FY16 are for federal public housing only. Total numbers for FY14 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, 2023

	FY14	FY15	FY16[1]	FY17	FY18	FY19	FY20	FY21	FY22	FY23
CHA FAMILY										
1 BR	399	390	316	284	1,396	2,014	2,423	2,903	3,098	3,326
2 BR	2,676	3,693	2,569	2,298	2,612	3,079	3,431	3,714	3,586	3,886
3 BR	1,379	1,785	1,214	1,199	1,625	1,886	1,969	2,109	2,138	2,179
4+ BR	278	249	213	208	591	699	740	809	859	841
SUBTOTAL	4,732	6,084	4,312	3,989	6,224	7,678	8,563	9,535	9,681	10,232
CHA ELDERLY/										
Studio or 1 BR	2,980	2,787	2,151	1,410	2,178	2,572	2,870	3,234	1,864	2,405
2 BR	114	154	106	81	173	220	259	299	123	153
SUBTOTAL	3,094	2,921	2,045	1,491	2,351	2,792	3,129	3,535	1,987	2,558
HCV ELDERLY/										
Studio or 1 BR				1,837	2,414	2,569	2,654	2,781	2,507	2,734
2 BR										
SUBTOTAL				1,837	2,414	2,569	2,654	2,781	2,507	2,734
HCV FAMILY										
Studio or 1 BR				5,982	7,546	8,081	8,564	8,925	9,479	9,278
2 BR				2,559	3,426	3,651	3,688	3,550	3,629	3,607
3 BR				979	1,390	1,558	1,564	1,548	1,532	1,578
4 BR				236	326	424	448	476	528	564
SUBTOTAL				9,756	12,724	13,714	14,264	14,499	15,168	15,027
SINGLE ROOM										
SRO				1,817	2,488		955	1,218	1,630	1,768

SOURCES + USES OF FUNDING

	Federal Public Housing	MTW Housing Choice Vouchers	Preservation Programs	NED/VASH	EHV	Capital Fund	Total MTW Funds
Sources							
Tenant Operating Receipts	$ 284,684						**$ 284,684**
Subsidy Earned	$ 4,804,944	$ 140,066,784	$ 4,342,427	$ 4,202,536	$ 2,961,399	$ 2,019,576	**$ 158,397,665**
Administrative Fees		$ 12,673,643	$ 511,056	$ 368,189	$ 195,148		**$ 13,748,037**
Total Sources	**$ 5,089,628**	**$ 152,740,427**	**$ 4,853,483**	**$ 4,570,725**	**$ 3,156,547**	**$ 2,019,576**	**$ 172,430,387**
Uses							
Administrative Salaries and Benefits	$ 155,822	$ 2,769,964	$ 74,565	$ 123,689	$ 109,425		**$ 3,233,466**
Maintenance Labor and Benefits	$ 150,675						**$ 150,675**
Resident Services	$ 22,551	$ 584,616					**$ 607,167**
Materials & Supplies, Contract Costs	$ 74,312						**$ 74,312**
General Expenses	$ 176,360	$ 4,947,520	$ 92,278	$ 128,632	$ 108,423		**$ 5,453,213**
Housing Assistance Payments		$ 98,926,939	$ 4,342,427	$ 4,080,103	$ 2,916,371		**$ 110,265,840**
Utilities	$ 192,267						**$ 192,267**
Capital Expenditures	$ 41,182					$ 2,019,576	**$ 2,060,758**
Transfers for Program Loans		$ 33,832,285					**$ 33,832,285**
Total Uses	**$ 813,169**	**$ 141,061,325**	**$ 4,509,271**	**$ 4,332,424**	**$ 3,134,219**	**$ 2,019,576**	**$ 155,869,983**
Net Surplus (Deficit)	**$ 4,276,459**	**$ 11,679,103**	**$ 344,213**	**$ 238,301**	**$ 22,328**	**$ -**	**$ 16,560,403**
Other HUD Subsidy	$ 1,994,750						**$ 1,994,750**
Transfers to Block for former PH Projects	$ (9,714,905)						**$ (9,714,905)**
Prior Year Surplus	$ 3,500,000						**$ 3,500,000**
Net Surplus (Deficit)	**$ 56,304**	**$ 11,679,103**	**$ 344,213**	**$ 238,301**	**$ 22,328**	**$ -**	**$ 12,340,249**

OTHER FEDERAL FUNDS - FY23

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

	Mainstream	Mod Rehab and Shelter Care	Total Other Federal Funds Budget
Sources			
Subsidy Earned	$ 6,510,325	$ 709,359	$ 7,219,684
Administrative Fees	$ 514,264	$ 144,974	$ 659,238
Total Sources	**$ 7,024,589**	**$ 854,333**	**$ 7,878,922**
Uses			
Administrative	$ 409,013	$ 117,719	$ 526,731
Housing Assistance Payments	$ 6,510,325	$ 709,359	$ 7,219,684
Total Uses	**$ 6,919,337**	**$ 827,078**	**$ 7,746,415**
Net Surplus (Deficit)	**$ 105,252**	**$ 27,256**	**$ 132,507**
MTW transfers		$ 14,291	$ 14,291
Net Surplus (Deficit)	**$ 105,252**	**$ 41,547**	**$ 146,798**

	State Leasing Program
Sources	
Subsidy Earned	$ 1,608,243
Administrative Fees	$ 67,100
Total Sources	**$ 1,675,343**
Uses	
Administrative	$ 80,948
General Expenses	$ 101,026
Housing Assistance Payments	$ 1,608,243
Total Uses	**$ 1,790,217**
Net Surplus (Deficit)	**$ (114,874)**
MTW Block Grant transfers	$ 135,968
Net Surplus (Deficit)	**$ 21,094**

Beginning Fund Balance-1/1/2023	**$ 15,229,755**
Sources	
Non-dwelling rent	$ 23,929
Consulting / Management Agreements	$ 1,181,940
Development Fee income	$ 862,751
Interest Receivable Payments - Program Loans	$ 670,859
Total Sources	**$ 2,739,479**
Uses	
Administrative costs	$ 1,082,416
Costs associated with Consulting / Management Agreements	$ 991,300
Transfers to LLC for Development Costs	$ 350,000
Total Uses	**$ 2,423,717**
Net Surplus (Deficit)	**$ 315,762**
Ending Fund Balance - 12/31/2023	**$ 15,545,517**

CENTRAL OFFICE COST CENTER - FY23

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 2023 Actual
Sources	
Total Management Fees	$ 7,268,397
Fee-for-Service fees	$ 1,013,919
Transfer from MTW Block	$ 500,000
Total Sources	**$ 8,782,316**
Uses	
Administrative Salaries	$ 3,619,294
Central Maintenance	$ 1,753,084
Benefits	$ 1,952,698
Administrative Contracts	$ 348,015
Office Rent	$ 222,580
Other Admin. OH	$ 860,638
Total Uses	**$ 8,756,310**
Net Surplus (Deficit)	**$ 26,006**

MTW BLOCK GRANT - FY23

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 2023 Actual
Beginning Fund Balance-1/1/2023	**$**	**1,098,971**
Sources		
HCV Transfers for program loans	$	33,759,162
LIPH transfers	$	9,714,905
Non dwelling rent	$	164,508
Other Program Transfers	$	300,262
Other Income	$	66,064
Total Sources	**$**	**44,004,901**
Uses		
Transfers to MRVP / State Housing	$	150,259
P & D Support	$	5,769,917
Pre-development Costs	$	17,081,102
Program Loans to LLCs	$	7,284,462
System Software Fund	$	758,238
PT Lab	$	334,279
System Implementation Costs-COCC	$	500,000
Advances to Other Projects	$	1,625,000
Total Uses	**$**	**33,503,256**
Net Surplus (Deficit)	**$**	**10,501,644**
Ending Fund Balance- 12/31/2023	**$**	**11,600,615**

	Resident Services	Resident Services Empowerment Inc	Total Resident Services	Cambride Housing Affordable Lending Corp
Sources				
Operating Receipts	$ 820,878		$ 820,878	
Interest income			-	$ 773,599
Other Operating Receipts	$ 1,799,489	$ 155,264	$ 1,954,753	
Release from Reserves	$ 600,000	$ 84,702	$ 684,702	
Total Sources	**$ 3,220,366**	**$ 239,966**	**$ 3,460,332**	**$ 773,599**
Uses				
Administrative Salaries & benefits	$ 2,345,064	$ 86,319	$ 2,431,383	
Management Fees			-	$ 38,816
Interest expense			-	$ 129,715
Other Admin expenses	$ 752,640	$ 30,317	$ 782,957	$ 11,535
Transfers to CCF Endowment	$ 112,333	$ 123,330	$ 235,663	
Total Uses	**$ 3,210,037**	**$ 239,966**	**$ 3,450,003**	**$ 179,526**
Net Surplus (Deficit)	**$ 10,329**	**$ (0)**	**$ 10,329**	**$ 594,073**

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			
Rindge Commons	8	0	N/A	N	Project-Based Units
Fresh Pond Apartments	40	0		N	Preservation Property
Weaver Street	20	0		Y	RAD Blend Conversion
Wolando Homes	0	8	Leased	N	Project-Based Units

Planned: 68 Actual: 8 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: Waiting on conversion timing for Weaver. Other project-based properties identified are still planned but did not occur in FY.

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			
PROPERTY NAME	Number of Project Based Vouchers	Number of Project Based Vouchers			
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	110	110	Leased/Issued	N	Project-based Units
411 Cambridge St	98	98	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	Y	Project-based Units
Norfolk Street	3	3	Leased/Issued	N	Project-based Units
803-815 Cambridge St	11	11	Leased/Issued	N	Expiring Use Preservation Property
808 Memorial Drive Housing	76	76	Leased/Issued	N	Project-based Units
8-10 Lancaster Street	58	58	Leased/Issued	N	Project-based Units
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 Apartments	29	29	Leased/Issued	N	Expiring Use Preservation Property

Briston Arms	48	48	Leased/Issued	N	Expiring Use Preservation Property
Brookside Terrace	150	150	Leased/Issued	N	Project-based Units
Burns Apartments Interim Holding LLC	199	199	Leased/Issued	N	Project-based Units
CAH Condos	27	27	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	Y	Project-based Units
Cambridgeport Commons	10	10	Leased/Issued	N	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	Y	Project-based Units
Center Street	1	1	Leased/Issued	N	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	Expiring Use Preservation Property
Cleaves Court	36	36	Leased/Issued	N	Expiring Use Preservation Property
Coes Pond	250	250	Leased/Issued	N	Project-based Units
Columbia CAST LLC	9	9	Leased/Issued	Y	Project-based Units
Columbus and Whittemore	5	5	Leased/Issued	N	Project-based Units
Corcoran Park Interim Holding LLC	153	153	Leased/Issued	Y	Project-based Units
Elderly Condos	4	4	Leased/Issued	N	Project-based Units
Elm Place	11	11	Leased/Issued	N	Project-based Units
Essex St Management Inc	13	13	Leased/Issued	Y	Project-based Units
Fairmont Street LLC	10	10	Leased/Issued	Y	Project-based Units
Family Condos	10	10	Leased/Issued	Y	Project-based Units
Garfield St LLC	8	8	Leased/Issued	N	Project-based Units
Harwell Homes	4	4	Leased/Issued	Y	Project-based Units
Hingham	4	4	Leased/Issued	N	Project-based Units
Inman Square Apts	115	115	Leased/Issued	Y	Project-based Units
Inman Street	4	4	Leased/Issued	Y	Project-based Units
Jackson Street LLC	10	10	Leased/Issued	Y	Project-based Units
Jackson Gardens	44	44	Leased/Issued	N	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	Y	Project-based Units
John F Kennedy	44	44	Leased/Issued	N	Project-based Units
Just-A-Start Corp - Otis	8	8	Leased/Issued	N	Expiring Use Preservation Property
Landfall	15	15	Leased/Issued	Y	Project-based Units
Lincoln Way	63	63	Leased/Issued	N	Expiring Use Preservation Property
Louis Barret Residences	135	135	Leased/Issued	Y	Project-based Units
Lyndon B. Johnson Apts	174	174	Leased/Issued	N	Expiring Use Preservation Property
Madison Park III	120	120	Leased/Issued	Y	Project-based Units
Manning	203	203	Leased/Issued	N	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	Expiring Use Preservation Property
New Mass Pike Towers LP	157	157	Leased/Issued	Y	Project-based Units
Newtowne Court	269	269	Leased/Issued	N	Project-based Units
Port Landing	7	7	Leased/Issued	Y	Project-based Units
Putnam Gardens LLC	123	123	Leased/Issued	N	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	Expiring Use Preservation Property
Quincy towers	161	161	Leased/Issued	Y	Project-based Units
Richdale and Ware	2	2	Leased/Issued	N	Project-based Units
Rindge House	13	13	Leased/Issued	Y	Project-based Units

River Howard LLC	34	34	Leased/Issued	N	Project-based Units
Russell Apartments LLC	54	54	Leased/Issued	Y	Project-based Units
Saint Paul	20	20	Leased/Issued	N	Project-based Units
Smith House Preservation	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	Y	Project-based Units
Truman Apartments	59	59	Leased/Issued	Y	Project-based Units
Valentine St	6	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	N	Expiring Use Preservation Property
Woodrow Wilson Court	68	68	Leased/Issued	N	Expiring Use Preservation Property
1221 Cambridge Street	116	116	Leased/Issued	N	Expiring Use Preservation Property
Harwell Homes	14	14	Leased/Issued	N	Expiring Use Preservation Property
St Stephens	130	130	Leased/Issued	N	Project-based Units
808 Memorial Drive Housing II	166	166	Leased/Issued	N	Project-based Units

Planned: 5,414 Actual: 5,414 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 2023, the Cambridge Housing Authority expended over $2.1 million on smaller-scale construction activities and $38.2 milion on major construction.

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	144	624	12	52
MTW Housing Choice Vouchers (HCV) Utilized	78,552	79,332	6,546	6,611
Local, Non-Traditional: Tenant-Based	2,592	2,280	216	190
Local, Non-Traditional: Property-Based	0	0	0	0
Local, Non-Traditional: Homeownership	0	0	0	0
Totals	81,288	82,236	6,774	6,853

* "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	84	84	7	7
Tenant-Based	Sponsor-based Voucher Program HC.2008.03	2,256	2,196	188	183
Service-Based	Pathways to Permanent Housing HC.2008.03A	252	348	21	21
Totals	_	2,592	2,532	216	211

* 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.

**Pending final SBV figures.

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	0
49%-30% Area Median Income	8
Below 30% Area Median Income	305

* 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 ADJUSTMENTS	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 HOUSEHOLDS SERVED IN PLAN YEAR^	PERCENTAGE OF HOUSEHOLDS SERVED IN PLAN YEAR^^	PERCENTAGE CHANGE FROM BASELINE YEAR TO CURRENT PLAN YEAR
1 Person	50%	3,487	52%	2%
2 Person	22%	1,536	23%	1%
3 Person	13%	780	12%	1%
4 Person	8%	514	8%	0%
5 Person	4%	199	3%	1%
6+ Person	2%	109	2%	0%

TOTAL	100%	6,625	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*	41	Participants experiencing positive EOP
Financial Stability and Savings SS.2013.01**	102	Participants that experienced a reduction in subsidy.
Sponsor-Based Voucher Program HC.2008.03*	16	Positive exit from Sponsor-based voucher program.
Implement Recertifications Every two years for Households/hcv- HC.2008.08 *	52	Positive EOP from CHA Housing
Rent Simplification Program (RSP)/Public Housing - CE.2006.01*	3	Positive Exit from CHA Housing
	214	(Households Duplicated Across MTW Activities)

214 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: $40,260	All FSS+ participants: 219 Average Earned Income for all FSS+ participants: $46,810 FSS+ participants that have been in the program for at least one year and experience an increase in earnings: 33 **Average Earned Income for FSS+ participants that have been in the program for at least one year and experienced an increase in earnings**: $37,910	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:** $4,765	**FSS+ participants that have been in the program for at least one year and established an account** $4,747	No. CHA has had many new enrollments in the past couple years.
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: 93	**FSS+ participants:** 219	Yes.
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: 48 **Avg Housing Assistance Payment (HAP) at FSS+ enrollment for participants that have been in the program for at least one year:** $1,271	FSS+ Participants that have been in the program for at least one year: 158 **Avg HAP of FSS+ participants that have been in the program for at least one year:** $1,428	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	$77,361	**<u>Monthly</u> TTP aggregated for FSS+ participants that have been in the program for at least one year:** $182,991	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:** 45	Number of FSS+ participants that **experienced end in subsidy**: 41	No, but close.
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: 61%	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.

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

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: 79%**	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: $38,018 FSS+ Participants that have been in the program for at least one year and experienced an increase in earnings: $40,108	All FSS+ participants: 157 All FSS+ participants: $46,300 FSS+ Participants that have been in the program for at least one year and experienced an increase in earnings: 30 **FSS+ Participants that have been in the program for at least one year and experienced an increase in earnings:** $33,097	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: 64%	**FSS+ Participants:** 72%	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**: 48	**FSS+ Participants that have been in the program for at least one year <u>and</u> experienced a reduction in subsidy**: 102	Yes.

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				**2,166**	**2,166**

*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:** 206	Units already preserved: 2,166 **Units Preserved in FY:** 0	Yes. The discrepancy is from the timing of the last conversion and incorrect sum of the units.

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
Heading Home	Duley House continues to make significant strides in its mission to provide a new opportunity for women experiencing chronic homelessness. There were numerous achievements in the reporting period including welcoming new clients, facilitating a permanent housing transition and fostering active community engagement. Throughout the year, the program embraced six new clients, while one successfully transitioned to more suitable permanent housing to meet her needs, marking significant gains towards the overarching goal of ending homelessness. Clients actively participated in various program activities, including monthly house meetings, community outreach programs, weekly food bank visits and monthly fire drills. Their engagement in maintaining client safety and adherence to periodic unit inspections underscored the commitment to creating a secure and healthy environment. The staff and clients at Duley have worked hard to stay connected to important community partners like On the Rise, Cambridge HealthCare for the Homeless and the Cambridge Economic Opportunity Committee. Clients remained actively engaged in case management services and received in-person clinical services from community medical providers. The program facilitated connections to community resources, enabling clients to work on strategies for healthy lives. All clients maintained food security through ongoing SNAP benefits and retained their health insurance coverage, ensuring access to needed resources. Three clients enrolled in Heading Home's Economic Mobility Services (EMS) last year, now branded as Career and Financial Services. One client, overcoming significant challenges and hospital visits, successfully enrolled in a Certification Course through Access to Recovery (ATR). This client is now actively participating in community workforce services, demonstrating a commitment to sobriety, and has attended job interviews. Two clients from Duly House dedicated their time to volunteer at Friends of Alewife Reservation (FAR), owned by the Department of Conservation and Recreation. This involvement reflects a commitment to community service and highlights the program's efforts to instill a sense of responsibility and belonging among its clients. The accomplishments signify the dedication and collaborative efforts of the Duley House program. As we continue to make strides in ending homelessness and promoting well-being, we express gratitude to our clients, staff, and community partners for their unwavering support. We look forward to the challenges and opportunities that the coming year holds, confident in our ability to make a lasting impact on the lives of the women we serve.
Transition House	Beyond these vouchers supporting us to house victims of domestic violence, a lot happens while families stay with us. One family (a mom plus one) came in with severe trauma even beyond the domestic violence (DV). The child in the family had been exposed to so much trauma, that she was having anger outbursts both at home and at school. Our child-clinician, and all the staff rallied with this family. The child received weekly therapy sessions, we helped the school navigate her struggles, and in the summer she was able to attend a therapeutic summer camp. After 297 days of stay with us the family was able to obtain a voucher (related to her DV history) and moved to subsidized housing still in Cambridge. This allows us to still see and support the family and for the child to not need to change schools again. We had an elder survivor of domestic violence that the PPH program allowed to go into CHA public- housing. Before coming to Transition House, she experienced violence by one of her (adult) children. She received supports from Transition House around safety and some assistance with food etc. She moved into one of our temporary units during COVID, but had no longer term housing solution. Through the PPH unit, she was able to stay in Cambridge, close to her medical care and other providers. The second participant was able to go to college, and able to take a voucher and move to a city where she has more supports for herself and her child.

Partner	Highlights
Specialized Housing	Once again we acknowledge the tremendous support from the CHA. It allows the individuals we serve, living with Developmental Disabilities, to be part of their larger community. This creates a sense of equality and adds to the diversity of the community as whole. These individuals would not have these opportunities in the absence of CHA support
Casa Myrna	Participant just turned 18 years old when she entered our safe home program. She was eight months pregnant at the time, while being exploited by her mother's boyfriend and homeless. GM needed immediate access to safety, medical care and intensive services and support. Shortly after her arrival, she gave birth to a son. DCF removed the child as a result of prior substance use. However, since she was residing in our program, she was immediately connected to Project Respect at Boston Medical Center, which provides the unique service of comprehensive obstetric and substance use disorder treatment for pregnant moms and their newborns. This gave her the opportunity to reunite with her baby upon completion of specific programs and goals. She was able to obtain custody of her son (with stipulations from DCF). GM attended an outpatient program five days a week, and we provided her with trauma counseling, peer support, parenting and skill building groups, and reconnected her with an educational program so she could acquire her high school diploma. She got a job, moved into permanent housing, is close to acquiring her GED with the goal of becoming an advocate, and is no longer DCF-involved.

CHANGES TO ACTIVITY, BENCHMARKS, BASELINE, METRICS

No new significant or insignificant changes to activity or metrics.

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 households: 362 households (109 vouchers) Transition House households: 4 Heading Home households: 4 Total Households: 370	Hard to House: 313 households (134) vouchers Transition House: 4 Heading Home: 4 Total Households: 321	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 households: 362 households (109 vouchers) Transition House households: 4 Heading Home households: 4 Total Households: 370	Hard to House: 313 households (134) vouchers Transition House: 4 Heading Home: 4 Total Households: 321	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 households: 362 households (109 vouchers) Transition House households: 4 Heading Home households: 4 Total Households: 370	Hard to House: 313 households (134) vouchers Transition House: 4 Heading Home: 4 Total Households: 321	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.
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	$3.3 million	No.
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	3.3 households	2.4 households	No.

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

IMPLEMENTATION YEAR **PREVIOUSLY APPROVED AUTHORIZATION**

Approved in FY01 MTW Plan and implemented in FY01. 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 following table 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
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
FY23	7	$48,486	$83,139	$577	$990

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	7 households.	Yes.
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: $83,139 Total households served: 7 **MRVP subsidy amount:** $48,486	Yes.

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: 2,375 Anticipated in FY: 20 **Total Units**: 2,395	Units completed to date: 2,375 New units online: 20 **Total Units:** 2,395	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
2023	0	0
2022	0	0
2021	0	1
2020	0	0
2019	0	0
2018	0	2
2017	2	0
2016	0	0

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

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.

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.

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	PREVIOUSLY APPROVED AUTHORIZATION
This program was approved and implemented in FY01. Modified in FY14.	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
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?**

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

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 to be project-based Expanding Supply of Hard Units: 20 Units to be project-based Expiring Use: 206 Units to be project-based through private nonprofit developers: 8 **Anticipated new units:** 234	Units project-based through expanding supply of hard units in FY: 0 Units project-based through Expiring Use in FY: 0 Units project-based through private nonprofit developers in FY: 8 **Total New units in FY:** 8	No.
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 to be project-based Expanding Supply of Hard Units: 20 Units to be project-based Expiring Use: 206 Units to be project-based through private nonprofit developers: 8 **Anticipated new units:** 234	Units project-based through expanding supply of hard units in FY: 0 Units project-based through Expiring Use in FY: 0 Units project-based through private nonprofit developers in FY: 8 **Total New units in FY:** 8	No.
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%	67%	68 %	Yes.

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

IMPLEMENTATION YEAR	PREVIOUSLY APPROVED AUTHORIZATION
Approved in the FY00 MTW Plan and implemented in FY00.	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.

FY23 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(monthly)
Zero Income at New Admission in Cambridge	2	1	1.5	$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	0	0	3	$0	$0
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	PREVIOUSLY APPROVED AUTHORIZATION
Approved and implemented in FY00.	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: 17

Total Distinct Units: 97

Total Vacancy/Damage Payments: $124,292

	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	3	$10,464	14	$747	2	$8,062	4	$2,016
Project-based vouchers	10	$61,578	44	$1,432	5	$43,432	35	$1,241
Total	13	$72,042	58		7	$51,494	39	

2023 Owners

Total Distinct Owners: 1,258

	In Cambridge	Outside Cambridge
Tenant-Based	265	914
Project-Based	38	13
Inclusionary	51	1
State	37	11

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	102	97	No. The number reflects total units in FY 2023.

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 (+/-)
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
FY23	$66,924,407	$4,561,382

*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.

FY23 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	146	63	42
Outside Cambridge	9	130	65	18
Total	**20**	**276**	**128**	**60**

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: 1,309 Interims to be completed: 3,239 Recertification Time: 1.25 hours Interim Time: .75 hours Staff Cost/hr: $42.25 **Total Cost: $141,189**	Recertifications performed: 1,537 Interims Performed in FY23: 3,253 Recertification Time: 1.25 hours Interim Time: .75 hours Hourly cost of recertification specialist: $42.25 **Total cost:** $184,252	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	Recertifications to be completed: 1,309 Interims to be completed: 3,239 Recertification Time: 1.25 hours Interim Time: .75 hours Staff Cost/hr: $42.25 **Total Time: 4,066 hours**	Recerts performed: 1,537 Interims Performed: 3,53 Annual Recertification Time: 1.25 hours Interim Time: .75 hours **Total Time:** 4,361 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	$21,932,195	26,767,173	Yes.
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	$29,105	$35,466	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	$26,000	$31,200	Yes. This number represents the median earned income of households that have earned income.

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%	**Total**: 4,205 **Total Employed:** 1,922 **Percent:** 46%	**Current Total: 4,327** **Total Employed:** 2,149 **Percent:** 50%	Yes.
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	299	346	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	**42**	52	Yes. Number represents voucher given up. Assumed positive move to market.

CE.2023.01 - PORTABILITY MOVES FOR THE HOUSING CHOICE VOUCHER PROGRAM

IMPLEMENTATION YEAR

Approved and implemented in FY23.

PREVIOUSLY APPROVED AUTHORIZATION

MTW Agreement, Attachment C.D.g

DESCRIPTION

Under this activity CHA will limit its jurisdiction to the City of Cambridge for the purposes of households wishing to use their voucher to port-in to CHA. While CHA is legally authorized to administer housing choice vouchers anywhere in the state, it is not financially or administratively feasible for CHA to be required to administer and/or absorb all vouchers wishing to port in to Massachusetts who may wish to select CHA as its administering agency.

Households may utilize their vouchers outside of Cambridge if they have been issued off of CHA's waiting list in accordance with CHA's policies and/or, for port-in households, after they have been leased in their unit in the City of Cambridge for at least one year.

Households wishing to port their voucher into Massachusetts and who locate a unit in a neighboring City or Town outside of Cambridge may exercise portability to the housing authority located in that City or Town. If CHA has issued a voucher to a porting household and they locate a unit outside of Cambridge then CHA will facilitate the transfer of the household's paperwork and voucher to the PHA that is present in that City or Town. If no housing authority is present in that City or Town then CHA will facilitate the transfer of the household's paperwork and voucher to the Regional Administering Agency (RAA) serving that area.

The proposed activity will allow CHA to achieve cost savings as it will limit the volume of port-in requests and will therefore result in time savings and the ability of CHA to issue more vouchers off of its waiting lists.

IMPACT

This activity saves staff time spent on processing these vouchers.

CHANGES TO ACTIVITY, BENCHMARKS, BASELINE, METRICS

None.

CE #1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease)	Total Cost of Task: $22,050 Staff Hourly Rate: $49 Number of hours to complete port-in file: 7.5 hours Total number of port-in requests: 60	Anticipated total cost of task in FY2023: $8,820 Staff Hourly Rate: $49 Number of hours to complete port-in file: 7.5 hours Anticipated total number of port-in requests: 24	Anticipated total cost of task in FY2023: $8,820 Staff Hourly Rate: $49 Number of hours to complete port-in file: 7.5 hours Anticipated total number of port-in requests: 24	Yes.
CE #2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark		
Total time to complete the task in staff hours (decrease)	Total time spent on activity prior to implementation: 450 hours Number of hours to complete port-in file: 7.5 hours Total number of port-in requests: 60	Anticipated total time spent on activity in FY2023: 180 hours Number of hours to complete port-in file: 7.5 hours Anticipated total number of port-in requests during FY2023: 24	Anticipated total time spent on activity in FY2023: 180 hours Number of hours to complete port-in file: 7.5 hours Anticipated total number of port-in requests during FY2023: 24	Yes.

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)	$0	No.
CE #2: Staff Time Savings/HCV				

CE.2021.01 - EMERGENCY WAIVERS

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	0	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

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.

IMPLEMENTATION YEAR

Approved and implemented in FY06.
Modified in FY09 and FY14.

PREVIOUSLY APPROVED AUTHORIZATION

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.

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				

CE.2009.01 - IMPLEMENT CEILING RENTS/PUBLIC HOUSING

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	$1,285,000	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 (+/-)**
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
FY23	$32,974,803	-$629,091

* 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

HARDSHIP APPLICATIONS

Application Year (by Fiscal Year)	Applications Received	Public Housing	HCV	Hardship Granted	Hardships Not Granted
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
2022	0	0	0	0	0
2023	0	0	0	0	0
Total	**49**	**33**	**16**	**28**	**22**

FY23 HOUSEHOLDS TRANSITIONED TO HOMEOWNERSHIP OR MARKET RENT[2]

Program	Homeownership	Market rent	Total
Public Housing	0	0	0
RAD	1	1	0
Former Public Housing	0	1	0
Total	**1**	**2**	**3**

1. Covers CY 2023.
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.

FY23 COUNT OF MIXED RENT HOUSEHOLDS

Program	Mixed Rent
FPHC	9
LIPH	0
RAD	23
Total	**32**

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: 1,988 Total Interims: 1,712 Recertification time: 2.25 hours Interim Time: 2 hours Staff Cost/hr: $42.25 Total Cost of Task: $333,648	Total Recertifications: 1,278 Public Housing: 15 RAD: 735 Former Public Housing: 528 Total Interims: 3,036 Public Housing: 6 RAD: 1,454 Former Public Housing: 1,576 Recertification time: 2.25 hours Interim Time: 2 hours Staff Cost/hr: $42.25 **Total Cost of Task**: $396,601 Public Housing: $1,839 RAD: $200,329 Former Public Housing:$194,435	No.
CE #2: Staff Time Savings/PH/RAD				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Total time to complete the task in staff hours (decrease).	Number of Annual Recertifications 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: 7,897	Total Recertifications: 1,278 Public Housing: 15 RAD: 735 Former Public Housing: 528 Total Interims: 3,036 Public Housing: 6 RAD: 1,454 Former Public Housing: 1,576 Recertification time: 2.25 hours Interim Time: 2 hours **Total Hours of Task**: 9,387 Public Housing: 45 RAD: 4,742 Former Public Housing: 4,602	No.

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

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: $14,253,203	**Total rental revenue collected:** $18,469,620 (due to changes in software figure combines RAD,FPLI, LIPH that were previously split out)	Yes.
SS# 3: Increase in Positive Outcomes in Employment Status/PH/RAD				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
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: 2,493 Total households with earned income:1,003	Total households: 2,336 Employed Public Housing: 19 RAD: 630 Former Public Housing: 358 **Total Households employed full or part-time:** 1,007	Yes.
	Percentage of Public Housing households that experienced Full-or Part-Time employment status on March 31, 2014: 40%	40%	**Percentage of households that experienced full or part-time employment**: 43%	Yes.

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

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: 88	**Total Households receiving TANF: 110** Public Housing: 1 RAD: 79 Former Public Housing: 30	No. 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: 3** Public Housing: 0 RAD: 2 FPH: 1	No. 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?**
Average Earned Income of households affected by this policy in dollars	$26,810	Total: $40,100	**Total Average Earned Income:** $40,022 Public Housing: $37,729 RAD: $39,106 Former Public Housing: $42,567	No. 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	$32,617	**Total Median:** $33,007 Public Housing: $22,368 RAD: $31,770 Former Public Housing: $37,180	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. Due to leadership transition in Leased Housing it was put on hold for longer than anticipated.

TIMELINE

CHA is planning to implement this program in FY25. Internal conversations have begun on what modifications may be needed from the original design.

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. CHA has almost completed all conversions as of FY24.

TIMELINE

Implementation of this activity will occur after the RAD transition is completed. This activity will either be implemented in FY25 or determined to be unnecessary and moved to be properly closed out.

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.

TIMELINE FOR IMPLEMENTATION

CHA will move this activity to closed out for the FY25 Plan.

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.

TIMELINE FOR IMPLEMENTATION

CHA will move this activity to closed out for the FY25 Plan.

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

No public comments received.

BOARD APPROVAL

CAMBRIDGE HOUSING AUTHORITY
WEDNESDAY, MARCH 27, 2024 5:30 P.M.

MEMBERS PRESENT:	ELAINE DEROSA, CHAIRPERSON SUSAN T. CONNELLY, TREASURER GERARD J. CLARK, MEMBER VICTORIA BERGLAND, MEMBER
ABSENT:	LOUIS BACCI, VICE-CHAIRPERSON
ALSO PRESENT:	MICHAEL JOHNSTON, EXECUTIVE DIRECTOR BRENDA DOWNING, DEPUTY EXECUTIVE DIRECTOR SHAYLA SIMMONS, GENERAL COUNSEL NICHOLAS DESOUZA, RECORDING SECRETARY

Approval of Submission of the FY23 MTW Annual Report

Ms. Connolly moved to approve the following:

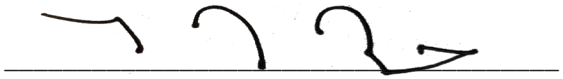
MOVED:

MOTION A: Approve the Moving to Work Deregulation Demonstration Program FY23 Annual Report;

MOTION B: 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

MOTION C: Authorize the submission of the final Report to the US Department of Housing and Urban Development, pursuant to the March 21, 2024 Memorandum from Zach Gordon to Michael J. Johnston, Executive Director.

Mr. Clark seconded the motion which upon being put to vote, was **four in favor, one absent**.



Michael Johnston, Executive Director