CAMBRIDGE HOUSING AUTHORITY

MOVING TO WORK

CHA

ANNUAL REPORT 2017

April 1, 2016 - December 31, 2017

HUD APPROVED ON DECEMBER 3, 2018

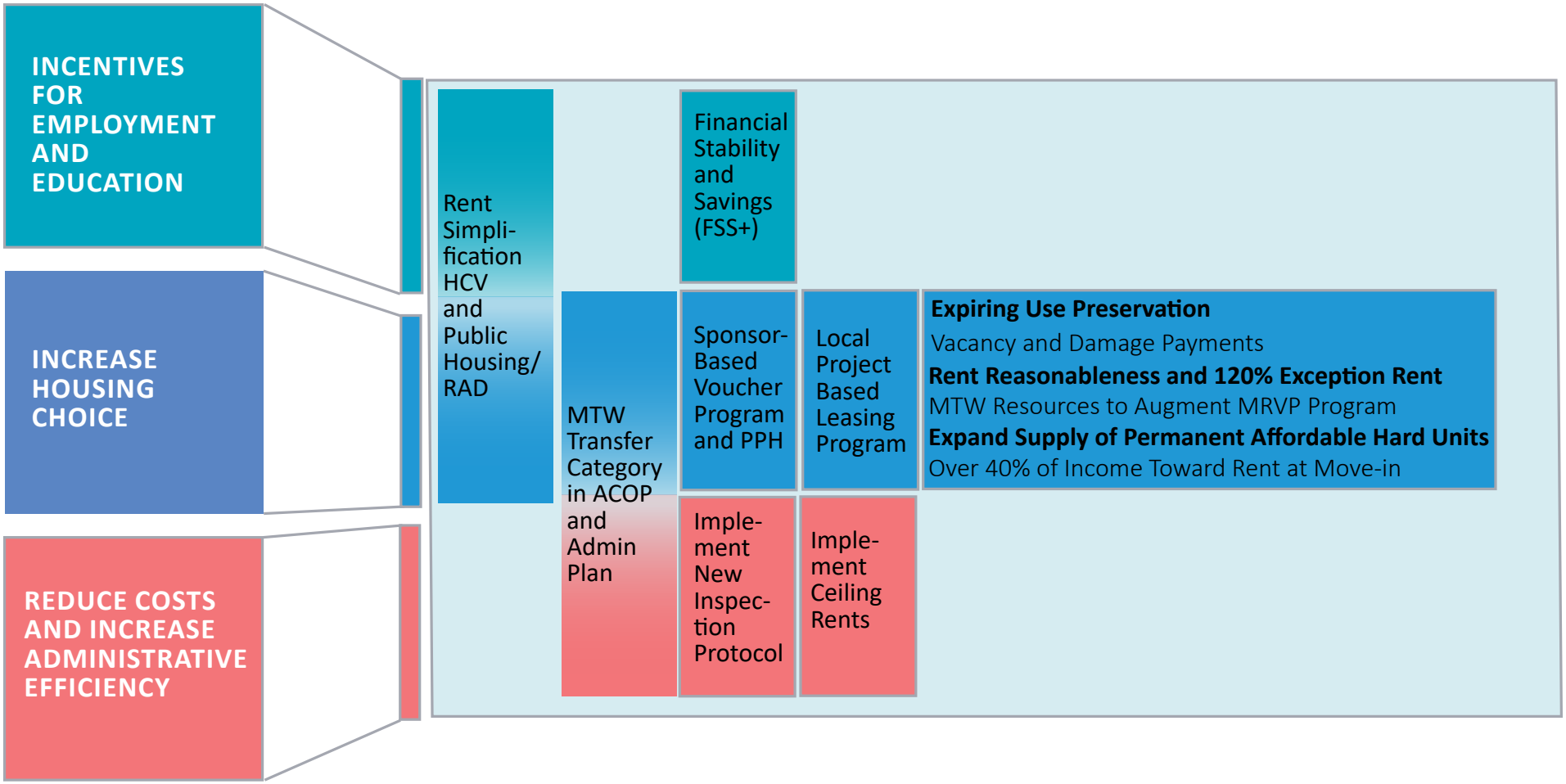
Affordable Housing, Parks and People
Sonia Andujar
Age 71
water color and pencil

This painting describes some of the basic interests held in common by tenants who live in Cambridge, MA. These three elements (Affordable Housing, Parks and People) enhance the quality of life in the city.

About the Artist: Sonia E. Andújar was born in Puerto Rico and has been a resident of Cambridge for the last 20 years. She was introduced to watercolor painting at the Cambridge Senior Center. Most of her work is exhibited at On the Wall Gallery of the Central Square Branch Public Library.

In 2010 she was the Bilingual lead organizer of the Art Exhibition at the Stebbins Gallery in Harvard Square for the Alliance of Cambridge Tenants (ACT). Nineteen public housing and Section 8 artists exhibited their work, recited poetry and played music. The Cambridge City Council congratulated ACT, the organizers and participants for this unique event.

In 2014, the Governor Deval L. Patrick gave Ms. Andújar a citation of recognition for her dedicated service to the Puerto Rican community of the Commonwealth. Ms. Andújar believes the Arts are a great path for developing fellowship and understanding among different cultures.



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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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	**TBV**	Tenant Based Voucher
HAP	Housing Assistance Payment	**TPP**	The Possible Project
HCV	Housing Choice Voucher	**VASH**	Veterans Affairs Supportive Housing (federal non-MTW voucher type)
HILAPP	High Leverage Asset Preservation Program (Commonwealth of Massachusetts)		
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 2017

APRIL 1, 2016 TO DECEMBER 31, 2017

HOUSING CHOICE

$127 Million in construction.

- Improvements on 941 units across 6 sites.
- Planning work on 1,354 unit across 22 sites

358 units preserved under Expiring Use Preservation

- 40 units under project-based contract.

SELF-SUFFICIENCY

16 FSS+ participants graduated from program.

- 5 graduates purchased a home.
- 3 graduates moved into market rent units with no CHA subsidy.

5 Sponsor-based voucher participants left the program and receive no public subsidies.

32 households left CHA housing (Public Housing, RAD, Former Public Housing) for homeownership or market rent.

- 15 purchased a home.
- 17 moved into market rent units.

COST EFFECTIVENESS

Institution of online platform for the opening of the Section 8 waitlist and elderly/disabled waitlist.

- Over 15,000 distinct applicants.
- Over 87,000 applications.
- Includes site-based waitlists.

Project-based landlord portal established to facilitate waitlist screening and lease up.

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CHA DEPARTMENT ACCOMPLISHMENTS

CHA's 21-month extended fiscal year included a number of critical changes, most notably in the conversion of public housing and change in executive leadership from Gregory Russ to Michael Johnston. During this transition year, an agency-wide strategic planning process was launched to examine how CHA can operate more effectively and efficiently to better serve our residents. The process has involved an expansive list of stakeholders and continues into 2018. In addition to the strategic planning, the following highlights departmental activities and achievements that occurred in FY17.

OPERATIONS

During FY17, a new Director of Operations led the department. Under his leadership, the department took a hard look at all of its policies and procedures. Through this process, CHA has modified internal best practices to better serve our resident population and look to formalize the policies and procedures in 2018.

UNITS IN SERVICE AT WASHINGTON ELMS, NEWTOWNE COURT, AND PUTNAM GARDENS

In FY17 CHA's RAD conversion affected several large family sites and specific buildings were placed in service for the Low Income Housing Tax Credit (LIHTC) Program. As of 12/31/17, all buildings at Washington Elms have been placed in service. Putnam Gardens and Newtowne Court will continue to have buildings placed in service in 2018, along with Manning Apartments (a large elderly building).

VACANCY OCCUPANCY AND RELOCATION

The Operations Department has begun screening prospective residents for future occupancy of the new JP State Development which is expected to complete construction in early 2018, as well as for Newtowne Court, Putnam Gardens, and Manning with construction wrapping up in 2018. Emptying units at Russell Apartments has begun in order to accommodate upcoming modernization efforts. Vacant units at Millers River continue to be held for future modernization at the site. For a list of relocation activity in FY17, please refer to **"Other Changes to the Housing Stock that Occurred During the Fiscal Year" section on page 46**.

ELDERLY/DISABLED SITE BASED WAITLIST OPENING

The Operations Department opened CHA's Elderly/Disabled site based waitlists on July 5th, 2017. We advertised the opening during the month of June in accordance with our Affirmative Marketing Plan. The waitlist opening occurred through an online application platform and paper applications are available to applicants through a reasonable accommodation request. A lottery was held for all applicants who applied during the month of July to prevent a large influx of applications on the first days of the waitlist opening.

RECERTIFICATION

As stated in the FY17 Plan, CHA worked to establish a recertification schedule in which all households undergo a recertification in calendar year 2017. However, not all households completed their recertifications by 12/31/2017 due to multiple mitigating factors such as, but not limited to, hospitalization and lack of resident cooperation. For households that did not undergo a recertification in 2017, CHA is working to ensure the households complete their recertifications in early 2018. In addition, Tax credit and rent recertification anniversary dates have been aligned at affected properties. However, at sites that are experiencing active construction and high volumes of relocation, CHA decided that it would make more sense to align the dates in 2018 or when construction is complete.

LEASED HOUSING

The Leased Housing Department is responsible for administering all of CHA's Housing Choice Voucher and related programs. This includes the Moving to Work Tenant-Based and Project Based Voucher programs, the Sponsor Based Program, Mainstream and Designated Housing Voucher Programs, the Veterans Affairs Supportive Housing Program (VASH), the Mod Rehab Single Room Occupancy (SRO) programs, as well as McKinney Vento Homelessness assistance programs. Additionally, the Leased Housing Department administers vouchers funded by the Commonwealth of Massachusetts through the Massachusetts Rental Voucher Program (MRVP), the Alternative Housing Voucher Program (AHVP), and the Department of Mental Health (DMH). Through this variety of programs CHA is able to serve a diverse population of individuals and families. In 2016-2017 CHA expanded both its Sponsor Based and Expiring Use Preservation programs, enabling more individuals and families to access housing assistance and other essential services. CHA also re-opened its Housing Choice Voucher Program waitlist, described in further detail below.

OPENING OF SECTION 8 WAITLIST AND SBWLS

On October 3, 2016 CHA re-opened its Housing Choice Voucher waitlist, which had been closed since June 2008. CHA launched an online application – the first time that CHA had offered an online application for any of its program waitlists. The online application not only reduces staff time and expense associated with the processing of paper application but also enables more people to apply as well as improves the information available to people at the time of application. Additionally, CHA launched an Applicant Portal from which applicants are able to check their status on waitlists and update household information.

CHA opened its Section 8 tenant-based voucher waitlist while also establishing site-based waitlists for project-based units. While CHA continues to allow properties outside of Cambridge to maintain their own waitlists, subject to CHA audit, CHA now maintains SBWLs for owners in Cambridge with more than ten Project Based Voucher (PBV) units. For owners in Cambridge with fewer than ten PBV units, CHA uses its Tenant-Based voucher waitlist to fill vacant units. In some cases, SBWLs may consist of one project-based development while some SBWLs contain several project-based developments that are grouped together by owner. Maintaining the waitlists centrally allows CHA to monitor the process and makes it easier for applicants to apply and obtain information regarding their status on the various CHA waitlists.

Despite the fact that CHA remains at or near full utilization of its HCV Program, we are obligated to maintain an active waitlist in order to meet our commitment to CHA's PBV owners. Opening the waitlists provide a measure of demand for the voucher program which informs both CHA as well as the City when discussing the need for affordable housing. As of December 2017 over 10,000 applications have been submitted for the Section 8 tenant-based and

project-based waitlists, demonstrating a clear demand and need for affordable housing in the area. Please see waitlist tables for demographic information on applicants seeking CHA housing.

EXPIRING USE / PRESERVATION PROGRAM

CHA continues to expand its Expiring Use Preservation program to properties both in and outside of Cambridge. Through this program CHA identifies units in the private rental market that are nearing the expiration of an existing subsidy contract (i.e. prepayment or expiration of Section 236 mortgage, RAP contract, Rent Supp, etc.) which would allow owners to convert the subsidized units into market-rate units if they choose. CHA is using MTW authority to project-base the tenant protection vouchers that become available when the subsidy contracts come to an end, preserving the affordability of these units for at least an additional fifteen years, even after the original residents move from the unit. While initially utilized in the City of Cambridge only, CHA has expanded this program to assist tenants and owners of properties outside of Cambridge. CHA has also partnered with local housing authorities in Worcester, Lynn, and Southbridge MA to better administer the program at properties further outside of the Greater Boston area.

In 2016-2017 CHA **preserved an additional 358 units in Boston through the Expiring Use Preservation program**. In November 2016 CHA began administering fifteen vouchers at Landfall Apartments. In April 2017 CHA completed voucher screenings for 162 residents of Quincy Tower, located in Boston's Chinatown neighborhood. In November 2017 CHA received an award from HUD to administer 178 enhanced vouchers for residents at Concord Houses, located in Boston's South End neighborhood.

Since 2011 CHA has been able to preserve the long-term affordability of over 1,900 units of housing throughout Massach https://support.zoho.com/portal/cambridgehousing/newticket usetts through the Expiring Use/Preservation program.

SPONSOR BASED VOUCHER PROGRAM

CHA's Sponsor Based Voucher program is an innovative program designed to help local service providers offer shelter and supportive services to hard-to-house individuals who are not typically served by traditional subsidized housing programs. In 2016-2017 CHA added two new programs to its Sponsor Based portfolio, one with a new partner and one with an existing partner. In May 2017 CHA partnered with Casa Myrna Vazquez, a Boston-based provider that assists individuals and families who have been victims of sex trafficking. CHA provides eight sponsor-based vouchers to Casa Myrna for the administration of this program. The sponsor-based nature of this program is important not only because it provides a financial resource to assist with the housing of these participants but also because it maintains the anonymity of the participants—because the voucher is in the name of the provider rather than the individual it lessens the amount of information that needs to be collected from the participant.

CHA also provided fifteen vouchers in July 2017 to Home for Little Wanderers, an existing partner, for the creation of a new program in Somerville for youth aging out of foster care and seeking educational advancement.

In 2017 CHA also increased its commitment to the Y2Y shelter in Harvard Square in order to enable them to expand their program and services into the summer months.

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.

BUSINESS SYSTEMS

CHA's Business Systems and Technology team completed the following during the FY.

Housing Management and GL System

A significant interim update of CHA's Elite system was performed in preparation for a major upgrade that the vendor anticipates will be release in the second half of 2018. This should represent a significant modernization of CHA's housing management and general ledger (GL) system that promises to improve the work experience for staff.

Reporting

The bulk of CHA's regularly used reports have been improved by 1) recreating them on a more flexible platform and 2) streamlining how these reports may be accessed by staff.

Email System Overhaul

To enable CHA to be compliant with information privacy standards in a more cost-effective manner, we have moved from Google's Gmail to Microsoft's Office 365.

POLICY AND TECHNOLOGY LAB EAST

In the FY17 Plan, PT Lab East identified the FSS+ Expansion Pilot and Creating Moves to Opportunity (CMTO) as core initiatives for the year. Updates on the two intiatives and additional activities are described below.

RENT-TO-SAVE PILOT

The Rent-to-Save pilot (described as the FSS+ Expansion Pilot in the FY17 Plan) was launched on March 1, 2016 at Corcoran Park and Jefferson Park Federal. The goal of the pilot is to increase asset-building for residents and see if financial coaching makes a difference. The program is designed so that residents at one site (Jefferson Park Federal) can access financial coaching from Compass Working Capital (non-profit partner) while they automatically start saving a small portion (1%) of the rent that they are charged in an Rent-to-Save (RTS) Account that CHA maintains. If a household's charged rent increases (likely though no always as a result of an increase in income), 50% of the difference in the rent increase is also automatically deposited in their account. Residents at the other site (Corcoran Park) also have RTS account but cannot access the financial coaching offered to the residents at Jefferson Park Federal. The first quarterly RTS account statements covered savings balances from April to June and were mailed to residents in July 2016. The most recent statement ending 12/31/2017 were mailed out in February 2018. Over half the three-year pilot period was completed at the close of FY17. Program highlights and outcomes may be found in the MTW Activities section of this Report on **page 55.**

CREATING MOVES TO OPPORTUNITY (CMTO)

The PT Lab has little to report on CMTO other than that is continues to participate in the CMTO working group that is now managed by MIT's Abdul Latif Jameel Poverty Action Lab (J-PAL). The working group is made up of housing authorities across the country that have interest in mobility programming

and the role of data in identifying indicators of opportunity neighborhoods. The focus of the effort is to advance mobility and support moves to and identify neighborhoods of opportunity. The group recognizes that place-based interventions are just as important as mobility interventions and that both strategies are pursued by housing authorities, depending on their location market. CHA's involvement in CMTO is minimal mainly because Cambridge is a neighborhood of opportunity, and our priority leans to place-based interventions in that we prioritize preservation of low-income housing units as the critical means for our voucher holders to live in Cambridge. Despite this difference, we see value in being part of this network and having insight into the national discussion, should it intersect with and influence HUD housing policy in the future. There is no indication of this at the time of this writing.

INTERNS

In summer 2017, the PT Lab engaged two MIT urban planning graduate students in full-time internships. One intern interviewed higher earning households (120 AMI and above) living in CHA units (public housing/RAD/former public housing) to gather qualitative information. CHA was particularly interested in learning if residents were considering or interested in purchasing a home and in what ways, if any, CHA could play in supporting homeownership. A one-page fact sheet of the findings is included as **Attachment 1.**

The other summer intern designed and administered a survey (online and paper) to all CHA mobile voucher holders living outside of Cambridge to understand the factors, if any, that led households to reside where they are and if there is interest in moving to Cambridge. At the time of this writing, the project is unfinished. The intern is aware of this and expressed that he intends to complete it.

RESIDENT SATISFACTION SURVEY

In March 2017, the PT Lab reached out to Edgemere Consulting to undertake a Resident Satisfaction Survey for all residents living in CHA housing (public housing, RAD, affiliates, and former public housing). The last survey occurred in April 2013 and we felt that it worthwhile to administer another survey to seek resident feedback on CHA's level of customer service, knowing that RAD conversion was underway. A goal of the survey was to invest in extensive outreach and gather as many responses as possible. Survey responses were gathered over 4 months (between mid-March and the end of July). We decided to administer the survey online and available in four (4) languages (Spanish, Portuguese, Amharic, and Haitian Creole). Paper surveys in the preferred language were mailed on request. Surveys were completed over the phone if that is preferred by the requester. In addition, coffee hours were held at Millers River, LBJ, and Manning Apartments to assist residents living in elderly buildings that may not be comfortable with technology. Cash drawings of $50 and $25 were offered at different times during the survey. Lastly, door-to-door surveys were completed at Jefferson Park, Corcoran Park, Lincoln Way, and Jackson Gardens. Relative to past years, an unprecedented 462 survey responses were received (19% of all households surveyed). An executive summary of survey results has been included as **Attachment 2.** Aggregate results of the survey may be viewed on the CHA website.

PERFORMANCE MANAGEMENT

Monthly review of each department continued to be a priority in the fiscal year. The strategic planning process has led senior staff and the executive team to re-think the organizational management of the agency, particularly as CHA's housing platform moves away from public housing to a project-based funding structure. At FY end, monthly management reports continue to be generated for the Leased Housing and Operations departments to ensure that households served and operational indicators in site management are tracked.

SECTION 3

In calendar year 2017, there were four (4) Section 3 hires and one (1) new tenant coordinator hire at CHA. Two (2) of the Section 3 hires have full-time positions in Leased Housing and the other two (2) Section 3 hires are full-time in the Operations Department. The new tenant coordinator was hired in the Operations department.

With regard to economic opportunities related to CHA's Resident Services department, please see the FY17 Resident Program + Services matrix in the proceeding section (after Voluntary Compliance) for an overview of programs and count of CHA residents that have participated in programs that support economic mobility. In brief, there were four (4) adults that enrolled in the Just-A-Start Biomedical Career program and 30 job placements through the Cambridge Employment Program. In addition 200 youths were enrolled in The Work Force and 90 youths were enrolled in This Way Ahead, the two core programs completely staffed by the Resident Services department.

SAFETY AND SECURITY

CHA's Public Safety Administrator has been working collaboratively with residents and Tenant Councils on safety issues that need to be addressed for residents to feel safe in their developments. The following provides an overview of actions during the FY taken by the Public Safety Administrator to address safety and security at CHA housing sites.

Lighting	17 surveys conducted on CHA properties.
Fire Safety	6 Fire and Evacuation training's conducted at elderly locations. This was an issue identified by residents in elderly housing.
Community Policing	17 monthly meetings took place in collaboration with Cambridge Police Department to discuss the security of residents and matters of importance to them.
Resident Training	1 Citizen Police Academy took place. An 8-week program teaching residents many aspects of police work, including elder abuse prevention, and domestic violence prevention.
Safety and Wellbeing	14 meetings discussing safety and well-being were conducted with Tenant Councils.

RESIDENT SERVICES

CITY-WIDE COLLEGE SUCCESS INITIATIVE

With the adoption of a city-wide charter and the creation of a city-funded Office of College Success in 2015, the College Success Initiative (CSI) works to formalize a coherent system of college-readiness, transition, and post-secondary persistence programs to better prepare and support low-income Cambridge students who choose to enter college. CHA continues to play a central role in the development and expansion of the initiative.

CSI is currently in the final year of a three-year strategic plan that set goals for partner agency collaboration, continuity in service delivery, and consistency in use of best practices to promote college access and persistence among low-income students. Over the past year, the initiative has secured a critical partnership with Bunker Hill Community College to promote curriculum alignment frameworks that provide under-resourced Cambridge Rindge and Latin students with opportunities to earn college credit that can be used towards an Associate degree. In addition, the Office of College Success received the financial backing to support a new part-time Alumni coaching position for CRLS graduates matriculated at UMass/Boston. Hired in the summer of 2017, this extends the initiative-sponsored post-secondary coaching positions to three, building on the work already being completed by the Bunker Hill Transition and Work Force Alumni coaches that are supported by funding from the CHA's Skillworks grant (see below).

WORK FORCE COLLEGE MATCHED SAVINGS PROGRAM

Nearly four years ago, Resident Services successfully launched the College Matched Savings Program, a financial education and college savings initiative embedded in our five-year Work Force program. Work Force students receive financial education workshops in grades 8 and 9 of the program, and are banked with deposit-only accounts at the start of their 10th grade year. For three years, participants can save up to $1500 through the program's exploratory and summer job offerings, and through a creative system of monetized incentives tied to program performance. CHA provides a 1:1 match at the end of each participant's senior year, which is used to defray educationally-related costs associated with post-secondary education.

Resident Services staff have worked hard to promote the program and to build a strong culture of savings. The 2017 Work Force graduating class achieved a total savings of $41,120. The 38 members of 2017 outpaced the savings total of the 2016 class by well over $6000. Average savings of the 2017 graduates was nearly $1,100 per student and 17 participants met or exceeded the $1500 savings ceiling and were awarded a maximum match of $3000. The program's demonstrated return on investment has led the Herb and Maxine Jacobs Foundation to fully underwrite the match and overall program costs.

RESIDENT SERVICES DATABASE SYSTEM

In 2016, Resident Services implemented a new database system built on a Salesforce platform. Designed to streamline the department's data collection and delivery efforts, the database includes (1) customized constituent management to track students, families, and alumni, (2) a program management system to track in-house programs and participant employment, and (3) the capacity to generate multi-functional reports and dashboards. This multi-functional database has significantly impacted the department's ability to access specialized data and to increase the speed at which in-house program outcomes can be generated.

In recent months, Resident Services was awarded a specialized $10,000 grant from Gap, Inc. (This Way Ahead Program partner and funder) to augment the database by allowing potential TWA participants to submit applications online. This represents significant time-savings during annual recruitment and intake periods.

MAKERSPACE – THE POSSIBLE PROJECT (TPP)

The Possible Project (TPP) is an entrepreneurial and business training program for teens that opened Makerspace, a state-of-the-art digital design and fabrication studio, in a renovated CHA warehouse space in 2015. This partnership represents an important experiment on how advanced and rapidly changing technologies can be incorporated into early career training for low-income youth. TPP annually serves upwards of 70 to 80 students in Cambridge, and roughly half are CHA residents. Foremost among the joint projects considered in this space was a plan to develop a series of successive 3D CAD printer workshops that would introduce the world of digital fabrication to residents through basic math and computer programming concepts. Additional discussion includes how to creatively combine TPP's entrepreneurship model with the Work Force program in hopes of strengthening both programs' curriculum offerings.

These plans were put on hold due to the relocation of The Possible Project program site and downsizing of TPP staff in late 2016. TPP underwent an organization restructuring and new strategic plan in 2017 that accented program expansion in Boston's Dudley Square. During this period, CHA invested significant time and energy in preparing for the launch of its "Brighter Futures" campaign.

As both partners move forward, we will continue to cultivate practical connections between TPP, Makerspace and the goals of Resident Services. It is our hope that, in the near future, we will generate the capital necessary to field additional opportunities for CHA residents.

SKILLWORKS INITIATIVE

CHA applied for a two-year grant from the regional SkillWorks Funding Group, managed by the Boston Foundation, and was selected to receive continued funding in 2018 for their Post-Secondary Support Initiative (PSSI). During the FY, the grant has supported two new positions: the Work Force Alumni Coach, who assists program staff in preparing seniors and their families for college, and provides targeted coaching to program alumni for two years after graduation; and a Bunker Hill Community College Transition Coach who supports each annual cohort of Cambridge Rindge and Latin High School graduates as they transition into community college and complete their first year of studies.

The positions bridge existing gaps and facilitate the critical transition into post-secondary work and learning. The Alumni Coach is embedded in our Work Force program, while the Bunker Hill Community College Transition Coach is overseen by the city's Office of College Success and will be based both at CRLS and at the community college. Both positions work to increase the number of low-income students who secure post-secondary degrees within six years of high school graduation, and to provide employment assistance support and career-readiness training to maximize participants' potential to secure the broad-based credentials necessary for sustained economic mobility.

In FY17, the SkillWorks project became fully operational, offering coaching support to roughly 160 students at three levels. The first two graduate cohorts (2016 and 2017 matriculated Work Force students) are currently receiving coaching along with current 2018 Work Force program seniors, who will be going through the college selection, application, and financial aid process in late spring 2018. In addition, we are formalizing a "low-touch" model of support for matriculated students who enter their junior and senior years in college.

The Alumni Coach has used Resident Services' database to track and document the indicators required by our Skillworks grant. The indicators measure whether students are positioning themselves to stay on target for course completion and graduation within five years of matriculation. We are also tracking outcomes or milestones related to students' job experiences and working with them to outline long-term career development goals. Over winter break 2018, we will be piloting informational workshops that bring together alumni with Work Force seniors to discuss the college application process, financial aid, and challenges encountered during their first two years of post-secondary education.

TENANT LIAISON

In FY10 CHA created a full-time Tenant Liaison position to advocate for the creation of tenant councils at CHA developments, and to assist in increasing the capacity of existing councils by engaging council membership in skills training and peer-networking. The Tenant Liaison played an important role in serving as an informational conduit between management and existing councils. With the advent of housing advocacy groups, such as the Alliance of Cambridge Tenants, and CHA's plan to reduce Central Office Cost deficits through targeted reduction in force, management chose to eliminate the Tenant Liaison position as of January 1st, 2018.

PLANNING AND DEVELOPMENT

Since the FY16 MTW Report, Planning and Development has continued to carry out its most ambitious scope of work at **over $217 million in construction** impacting 941 units of housing at six different sites, and work at 22 other sites impacting 1,354 units of housing in the planning stages.

Five (5) of the six (6) sites in construction during this period --- Woodrow Wilson Court, Washington Elms, Newtowne Court, Putnam Gardens and Manning Apartments – are part of CHA's RAD Phase 1 efforts. The sixth site, Jefferson Park State, has been made possible through $17 million in combined support from the City of Cambridge Affordable Housing Trust and the Commonwealth of Massachusetts' High Leverage Asset Preservation Program (HILAPP).

Outside of RAD and HILAPP, we have converted 348 units at two additional developments – Millers River Apartments and Russell Apartments – using tenant replacement vouchers provided after HUD approved CHA's disposition applications under Section 18 of the United States Housing Act (USHA) of 1937 (as amended).

In total, **as of December 31, 2017, CHA will have converted 1,498 units of federal public housing, or 61.7% of its total**. Construction expenditures from April 1, 2016 through December 31, 2017 total over $153 million. CHA has been able to **leverage nearly $264 million in private equity or debt** to support the construction and associated soft costs, with every dollar from CHA or the City of Cambridge leveraging $19.28 in private equity or debt. In addition to improving the quality of life for current and future CHA residents, this phase of renovation work created approximately 897 direct jobs, 1,040 indirect jobs, and $150 million of economic activity for the city and region through indirect and induced activities.

Also noteworthy, despite a housing market where the median sales price for condominiums is $612,000 and one-, two- or three-unit homes are at over $1 million, **CHA has expanded its affordable housing by forty-seven (47) new units** as part of the ongoing construction.

RAD PHASE 1 CONVERSIONS AND CONSTRUCTION NEARING COMPLETION

CHA completed the conversion of nine RAD Phase 1 developments in March 2016, converting a total of 1,150 units to RAD Section 8 Project Based Vouchers. Five of the nine developments required major capital improvements. The remaining four developments had been either recently completed in 2012 and 2013 through ARRA (Lyndon B. Johnson Apartments, Jackson Gardens, and Lincoln Way) or in 2004 through HOPE VI (John F. Kennedy Apartments). Construction work on the five -- Woodrow Wilson Court, Washington Elms, Newtowne Court, Putnam Gardens and Manning Apartments – has been underway since FY 2016 (or earlier), as discussed in detail below. Funding for the construction work was secured through tax-exempt bonds issued by MassDevelopment, tax credit equity, and both short-term and long-term private debt.

Essex Street Management, Inc. – RAD PBV Conversion	
Woodrow Wilson Court 100% Complete Completed: June 2016	The $2.56 million construction contract at Woodrow Wilson Court was completed in June 2016. Construction work at the 68 unit family development in the Cambridgeport neighborhood consisted of selective modernization as the property had previously been comprehensively modernized in 2006. The RAD-financed selective modernization scope included the construction of a new trash room, the decommissioning of existing trash equipment and trash chutes, the installation of a new fire alarm system, select exterior envelope repairs, and replacement of the boiler plant and the domestic hot water sanitary piping. An LED lighting upgrade was completed concurrently with use of utility incentives administered by Boston ABCD. The project was financed through a private activity bond issued by MassDevelopment, private equity access through the 4% LIHTC program, and both short term and long term private debt as part of the property's March 2015 RAD Conversion. Since April 1, 2016, construction expenditures totaled $804,055, or approximately 31% of the total construction cost. All of the expenditures were in the remaining period of CY 2016.
Washington Elms 100% Complete Completed: June 2017	The nearly $28 million construction contract at Washington Elms was completed in June 2017. Construction work at the 175 units of family housing development in The Port neighborhood included significant exterior renovations, boiler plant replacements, as well as some minor interior unit work. Specific upgrades included an elastomeric coating over the 2nd and 3rd story buff bricks, removal and replacement of exterior entry stairs, complete replacement of 6 boiler plants, installation of insulation between floor plate and basement, new site security cameras, new trash/recycling enclosures, refurbished rear courtyards, new exterior doors, and new unit thermostats and ventilation components in units. The project was financed through a private activity bond issued by MassDevelopment, private equity access through the 4% LIHTC program, and both short term and long term private debt as part of the property's March 2015 RAD Conversion. Since April 1, 2016, construction expenditures totaled $20,495,349, or approximately 73% of the total construction cost. In the balance of CY 2016, expenditures totaled $13,336,684. In CY 2017, expenditures totaled $7,158,665.

Newtowne Court 95% Complete Expected Completion: Spring 2018	The approximately $48 million construction contract at Newtowne Court is funding a comprehensive modernization of the 268 units of family housing in The Port neighborhood. Work has been underway since April 2015. The scope of work has included phased construction of interior apartments including new kitchens and bathrooms, complete building systems, a high efficiency heating system featuring a 120 kW congeneration plant, fire alarm and sprinkler systems, as well as masonry restoration, landscaping, civil infrastructure and other site improvements across the development. The final phase of unit work was completed in early January 2018, with final site work scheduled to be completed in Spring 2018. Work has been financed through a private activity bond issued by MassDevelopment, private equity access through the 4% LIHTC program, and both short term and long term private debt as part of the property's March 2015 RAD Conversion. Since April 1, 2016, construction expenditures totaled $27,793,872, or approximately 58% of the total construction cost. In the balance of CY 2016, expenditures totaled $12,810,630. In CY 2017, expenditures totaled $14,983,242.
Putnam Gardens 89% Complete Expected Completion: Summer 2018	The $24.5 million construction contract at Putnam Gardens is funding a comprehensive modernization of the 122 units of family housing in the Riverside neighborhood. Work has been underway since January 2015. The work has included the phased construction of apartment interiors including new kitchens and bathrooms, installation of four exterior trash buildings, full high efficiency heating system replacement, and fire alarm upgrades and sprinkler system installation. The final phases of unit work are now underway, with the final unit work scheduled to be completed in May 2018. Work has been financed through a private activity bond issued by MassDevelopment, private equity access through the 4% LIHTC program, and both short term and long term private debt as part of the property's March 2015 RAD Conversion. Since April 1, 2016, construction expenditures totaled $12,667,179, or approximately 52% of the total construction cost. In the balance of CY 2016, expenditures totaled $4,128,641. In CY 2017, expenditures totaled $8,538,538.
Manning Apartments 88% Complete Expected Completion: Summer 2018 6 new units	The $64.1 million comprehensive modernization of Manning Apartments, a 198-unit unit of elderly and disabled housing in the Central Square neighborhood, is in its final stages with the last phase of unit work scheduled to be completed by March 2018, with common areas and site improvements to be completed by July 2018. The work performed at Manning has included the phased comprehensive modernization of apartment interiors, heating and cooling systems including 60 Kw of cogeneration, interior and exterior common spaces, and exterior façade. Six additional units are being created on the second floor repurposing a portion of CHA's older administrative offices. The scope also includes a full renovation of the Martin Luther King, Jr. Plaza to introduce a driveway for safe pick-up and drop-off of residents and the full renovation of the public plaza shared with the Central Square branch of the Cambridge Public Library. Work has been financed through a private activity bond issued by MassDevelopment, private equity access through the 4% LIHTC program, and both short term and long term private debt as part of the property's March 2015 RAD Conversion. Since April 1, 2016, construction expenditures totaled $50,628,375, or approximately 79% of the total construction cost. In the balance of CY 2016, expenditures totaled $28,403,019. In CY 2017, expenditures totaled $22,225,356.
Essex Street Management, Inc. – Section 18 PBV Conversion	
Russell Apartments 0% Complete Expected Completion: March 2019 1 new unit	The $13.7 million construction contract at Russell was finalized in November 2017, with the HUD disposition and financing closing occurring in late December 2017. Construction work is scheduled to begin in March 2018 once relocation activities with the residents and the building's one commercial tenant, North Cambridge Senior Center, are completed. The comprehensive modernization of this 51 unit elderly and disabled development in the North Cambridge neighborhood comprises interior apartments refurbishments including new kitchens and bathrooms, complete building systems upgrades to the heating system, fire alarm upgrades and sprinkler system installation, plumbing and sanitary pipe replacement, electrical system replacement and upgrades as well as masonry restoration, roof replacement, and selective landscaping improvements. The project also includes the conversion of an under-utilized lounge space into a new residential unit, resulting in a 52-unit. The project is financed through a private activity bond issued by MassHousing, private equity access through the 4% LIHTC program, and both short term and long term private debt. In 2017, $135,627 in construction costs were incurred.

Cambridge Affordable Housing Corporation (CAHC)	
5 Temple Place 100% Complete Completion: December 2015	The $11.6 million new construction of Temple Place Apartments, 40 units of family housing in Central Square in Cambridge in December 2015. The project has been financed through the Cambridge Affordable Housing Trust, equity through the 9% LIHTC program, a variety of soft loans provided through the Commonwealth of Massachusetts, and both short-term and long-term private debt. CHA is providing 40 project-based vouchers to cover a portion of the operating costs and debt service for the new units. $3.1 million was spent prior to the reporting period, with $39,023,887, or 77% of project cost spent since April 1, 2016. In the balance of CY 2016, final expenditures at Temple totaled $960,868, or approximately 8% of the overall project costs as part of the project's close-out.
Jefferson Park Apartments 88% Complete Planned Completion: November 2017	The $51 million new construction of Jefferson Park Apartments, a 104 units of family housing in North Cambridge, began in November 2015. The new units replace obsolete state public housing units. The project has been financed through the Commonwealth's new High Leverage Asset Preservation Program (HILAPP), the Cambridge Affordable Housing Trust, tax credit equity, private activity bonds issued by MassDevelopment, and both short-term and long-term private debt. CHA is providing 104 project-based vouchers to cover a portion of the operating costs and debt service for the new units. $3.1 million was spent prior to the reporting period, with $39,023,887, or 77% of project cost spent since April 1, 2016. In the balance of CY 2016, expenditures totaled $13,636,526. In CY 2017, expenditures totaled $25,387,361.
Millers River Apartments Expected Closing: Fall 2018	Millers River Apartments was approved for disposition under Section 18 of the U.S. Housing Act of 1937 (as amended) and has capital needs of over $90 million. An interim disposition of the Millers River occurred on June 1, 2016 with the projected final transfer to a LIHTC equity investor scheduled to occur in Fall 2018. The interim period was designed to allow CHA to secure tax credit equity (4%) and both short-term and long-term private debt. In October 2017, CHA received notification from the Commonwealth of Massachusetts that Millers River would receive the required private activity bonds to allow the project to proceed to construction. Construction is scheduled to begin later in 2018. CHA is currently in the process of selecting a Construction Manager to construct the project.

PHASE 2 CONVERSION, CONSTRUCTION AND PLANNING UNDERWAY

Federal As noted, CHA has converted 348 federal public housing units at Millers River Apartments and Russell Apartments using tenant replacement vouchers provided after HUD approved CHA's disposition applications. In addition to the HUD approval, the CHA has received allocations of private activity bonds to allow both projects to proceed to construction. Further information on each of those projects are detailed below.

CHA's remaining federal public housing total 929 units (or 980 units if including Russell Apartments which were part of CHA's recent disposition applications). After completing existing conditions studies and updated capital needs assessments, CHA concluded that solely relying upon RAD as a mechanism to fund the needed renovations and ensure the long-term viability of the remaining 929 units in its portfolio-wide RAD conversion was no longer practical given the capital needs of the project.

As part of this assessment CHA identified five properties with a total of 701 units (including Russell Apartments) that met HUD's definition of obsolescence under Section 18 of the USHA of 1937, as amended. Applications were submitted to HUD in December 2016 detailing the conditions and factors supporting CHA's finding and indicating CHA's plan to renovate and preserve the properties through the disposition process coupled with project-basing the anticipated Tenant Protection Vouchers which would come with HUD's approval.

The chart below details the status of these applications, and current status of the each project:

Burns Apartments HUD Approval: 08/04/2017	CHA is working with the architectural firm, BH+A, and has completed design work through the schematic phase at Burns Apartment, a 198 unit elderly and disabled housing development in North Cambridge. CHA is waiting an allocation of private activity bonds from the Commonwealth of Massachusetts to finalize a construction scope of work and to move forward with the financing and construction. CHA received Section 8 Tenant Replacement Vouchers, and is proceeding to convert Burns Apartments to Section 8 in accordance with the disposition approval.
Jefferson Park HUD Approval: 08/31/2017	CHA is working with the architectural firm, Baker Wohl Architects, and towards completion of the design work through the schematic phase at Jefferson Park, a 175 unit family development in North Cambridge. Recently, CHA determined that interim repairs to restore the 57 units at Jefferson Park with living space in the lower level of buildings will not be enough to make sufficient improvements to the deteriorated conditions. CHA is working with the affected residents to relocate them to more suitable CHA or CHA-affiliated housing. CHA is waiting an allocation of private activity bonds from the Commonwealth of Massachusetts to finalize a construction scope of work and to move forward with the financing and construction. HUD's approval established a deadline of August 31, 2020 for CHA to proceed with financing. CHA received Section 8 Tenant Replacement Vouchers, and is proceeding to convert Jefferson Park to Section 8 in accordance with the disposition approval.
Corcoran Park HUD Approval: 09/01/2017	CHA is finalizing the hiring of an architectural firm to oversee the design work at Corcoran Park. A 153 unit family development in the Strawberry Hill neighborhood. The firm should be hired, and work initiated by late February 2018. CHA is waiting an allocation of private activity bonds from the Commonwealth of Massachusetts to finalize a construction scope of work and to move forward with the financing and construction. HUD's approval established a deadline of September 1, 2020 for CHA to proceed with financing. CHA received Section 8 Tenant Replacement Vouchers, and is proceeding to convert Corcoran Park to Section 8 in accordance with the disposition approval.
Russell Apartments HUD Approval: 10/03/2017	CHA received an allocation of private activity bonds from the Commonwealth of Massachusetts for use in 2017 for Russell Apartments, a 51-unit elderly and disabled housing development. As noted elsewhere, CHA closed on the financing of this project and completed its conversion from the public housing program using Section 8 replacement vouchers in December 2017.
Roosevelt Towers HUD Approval: 01/02/2018	CHA is working with the architectural firm, Dietz & Company to complete design work through the schematic phase. CHA is waiting an allocation of private activity bonds from the Commonwealth of Massachusetts to finalize a construction scope of work and to move forward with the financing and construction. CHA has not yet received an allocation of Section 8 Tenant Replacement Vouchers, and will not be eligible until the project has its allocation of private activity bonds.

With the disposition applications approved, CHA is now able to proceed with working to finalize the financing strategy for the remainder of the portfolio, 280 units, using RAD as its conversion tool. In some instance, as noted below, CHA's access to Private Activity Bonds continue to impact our ability to proceed as quickly as we would prefer.

The chart below details the status of these projects as organized by HUD's RAD-issued Commitment of a Housing Assistance Payments (CHAP), and details their next RAD deadline or projected RAD closing date.

River Howard Project RAD Closing: Spring 2018	CHA submitted its financing plan in November 2017 to convert River Howard, a 32-unit development located in the Riverside neighborhood. The property was comprehensively modernized in 2006, and does not need any immediate substantive repair work. However, it does require a substantial deposit of approximately $3.7M to its replacement reserve to meet RAD's 20-year viability requirement.
Willow Street Project RAD Closing: Spring 2018	CHA submitted its financing plan in November 2017 to convert Willow Street, a 14-unit development located in the Wellington Harrington neighborhood. The property was comprehensively modernized in 2010, and does not need any immediate repair work. However, it does require a substantial deposit of approximately $1M to its replacement reserve to meet RAD's 20-year viability requirement.

UDIC Properties Financing Plan Due: January 31, 2018	CHA requested HUD in September 2017 to revise its scattered site CHAP to allow certain properties to proceed on a different financing schedule. Updated CHAPs are anticipated. The noted financing plan due date is tied to the revised CHAP being released. Similar to River Howard and Willow Street Homes, UDIC was comprehensively modernized in 2010, and does not need any immediate work. However, it does require a substantial deposit of approximately $2.6M into its replacement reserve to meet HUD's 20-year viability requirement. CHA has been advised by HUD to wait to submit its financing plan until an individual CHAP is created.
Cambridgeport Commons Financing Plan Due: January 31, 2018	CHA requested HUD in September 2017 to revise its scattered site CHAP to allow certain properties to proceed on a different financing schedule. Updated CHAPs are anticipated. The noted financing plan due date is tied to the revised CHAP being released. The units at Cambridgeport Commons do not need any immediate repairs. However, it does require a substantial deposit of approximately $1M into its replacement reserve to meet HUD's 20-year viability requirement. CHA has been advised by HUD to wait to submit its financing plan until an individual CHAP is created.
Garfield Street Financing Plan Due: April 30, 2018	CHA requested HUD in September 2017 to revise its scatted site CHAP to allow certain properties to proceed on a different financing schedule. Updated CHAPs are anticipated. The 8 family units at Garfield Street were originally constructed in 1997, and current conditions at the property require all interior and exterior finishes and systems to be comprehensively modernized. CHA is working with Winslow Architects to finalize the construction documents, and anticipate hiring a contractor mid-2018. The current anticipated construction cost is $2.5M. CHA will be submitting a financing plan in advance of its April 30, 2018 deadline.
Small Family Financing Plan Due: April 30, 2018	CHA requested HUD in September 2017 to revise its scatted site CHAP to allow certain properties to proceed on a different financing schedule. Updated CHAPs are anticipated. The small family component consists of five buildings in five locations with 2 to 4 units per building, and include buildings at 15 Inman, 12-18 Hingham, 226 Norfolk, 125-127 Whittemore, and 8-10 Columbus. CHA is working to finalize each building's capital needs assessment, and will be developing a financing plan in anticipation of meeting the April 30th deadline.
Scattered Condominiums Financing Plan Due: April 30, 2018	CHA requested HUD in September 2017 to revise its scatted site CHAP to allow certain properties to proceed on a different financing schedule. Updated CHAPs are anticipated. The 17 scattered condominium units are located throughout the City at 12 locations, and included 5 1BRs, 11 2 BRs, and 1 3 BRs units. CHA is working to finalize each unit's capital needs assessment, and will be developing a financing plan in anticipation of meeting the April 30th deadline.
St. Paul's and 116 Norfolk Street Financing Plan Due: April 30, 2018	CHA will be requesting to HUD shortly that it separate these two properties into their own CHAPs since the financing needs of each site differ significantly. For St. Paul's, CHA is working with The Narrow Gate to finalize the construction documents, and anticipate hiring a contractor mid-2018. CHA will be submitting a financing plan in advance of its April 30, 2018 deadline. St Paul's currently has 18 SRO units, and 2 family units. For 116 Norfolk Street, the needs of the building which contains 37 SRO units would benefit from an allocation of private activity bonds, and the property is listed on CHA's request to the State. We anticipate requesting an extension from HUD for submitting its financing plan.
Weaver and Linnaean Street Financing Plan Due: April 30, 2018	CHA will be requesting to HUD shortly that it separate these two properties into their own CHAPs since the financing needs of each site differ significantly. For Weaver, CHA is working with Zero Energy Design to finalize the schematic design, and hopes to begin discussion with the larger community about a possible addition to the property. Right now, the property has a mix of studios and one bedrooms and functions as development for elderly and disabled. For Linnaean Street, a 20 unit development of all studios for elderly and disabled just outside of Harvard Square, we are still assessing needs and opportunities to determine how best to proceed with ensuring its long-term viability. We anticipate requesting an extension from HUD for submitting its financing plan.
Truman Apartments Financing Plan Due: April 30, 2018	For Truman Apartments, we are still assessing needs and opportunities to determine how best to proceed with ensuring its long-term viability. We are working to see if it is possible to come up with a renovation plan that can be deployed over time without necessitating the immediate need for private activity bonds.

State: CHA's two remaining State public housing developments, Roosevelt Towers and Putnam School with a total of 110 units, are supported through the Section 8 Substantial Rehabilitation or New Construction programs. CHA is working with the Commonwealth's Department of Housing and Community Development (DHCD) to have these two development exit the State Public Housing Program using HUD's Mark-Up to Market Program. This program allows

Owners to obtain an increase up to comparable market-rate rent levels for all units covered under a project-based Section 8 contract. CHA would use the higher rent levels as part of the redevelopment and rehabilitation of these two sites. CHA submitted is formal request to DHCD in November 2017. DHCD has reviewed CHA's application, and has submitted it to HUD for its review and approval.

In addition to these two developments, the CHA operates three special need facilities housing twenty-five individuals. These facilities are supported with capital funds from DHCD and operating funds from the Department of Mental Health (DMH). A vendor, VinFen, operates the programs and provides the services required by the participants through a contract with DMH. The properties are located on Hammond Street, Aberdeen Avenue, and Woodbridge Street. CHA recently submitted an application in January 2018 seeking approximately $1M and a rent increase to DHCD under its Moving to Independence Program to fund identified rehabilitation and establish a replacement reserve that would ensure the long-viability of the physical facilities without any future need for DHCD resources.

OTHER MODERNIZATION ACTIVITIES DURING PERIOD

In addition to its large scale reinvestment in public housing in Cambridge, the Planning & Development Department has continued to perform other modernization activities to either stabilize a condition or address specific needs at various properties. A listing of these activities and the construction activity involved is provided below.

Construction Completed

Development	Type of Funding	Work Activity	Construction Cost	Completion Date
Truman Apartments	MTW	Elevator Upgrade	$38,142	Apr-2016
JFK Apartments	Reserves	Sanitary Pipe Replacement	$32,000	Sep-2016
Roosevelt Twrs Mid	MTW	Emergency Roof Repairs	$41,236	Oct-2016
Temple	Reserves	Fence Around Generator	$5,950	Oct-2016
Subtotal - 2016			$117,328	
Burns/Millers River	MTW/Site	Duct Cleaning	$30,700	Jul-2017
Millers River	MTW	Sewer Repair	$108,449	Dec-2017
Central Office	MTW	Three Office Reconfigurations	$53,059	Sep-2017
689 Special Needs	State	Hammond Fire Alarm	$23,200	On-Going
689 Special Needs	State	Woodbridge Kitchen Mod	$123,640	Jul-2017
689 Special Needs	State	Kitchen and Bath Mod	$394,520	Feb-2017
Jefferson Park Fed	MTW	Emergency Sewer Repairs	$253,836	Oct-2017
Jefferson Park Fed	MTW	Emergency Drainage Repairs	$115,691	Nov-2017
Jefferson Park Fed	MTW	Water Line Repairs	$19,427	Jan-2017
JFK Apartments	Reserves	Heating Plant Replacement	$677,543	Dec-2017
Temple	Reserves	Laundry Ventilation Upgrade	$2,898	Jul-2017
Subtotal - 2017			$1,802,963	
Total During Period			$1,920,291	

In Planning

Development	Type of Funding	Work Activity	Construction Cost (est)	Projected Construction
Ashton	Reserves	Heat Plant Replacements	$150,000	Summer 2018
Central Office	MTW	Lobby Improvements	$75,000	Spring 2018
689 Special Needs	State	Heating System Upgrade	$120,000	Spring 2018
689 Special Needs	State	Porch Replacement (Wood.)	$15,000	Spring 2018
Burns	MTW	Duct Cleaning	$65,000	Spring 2018
Jefferson Park Fed	MTW	Basement Boarding	$150,000	Summer 2018
JFK Apartments	Reserves	Trash System Upgrade	$50,000	Fall 2018
JFK Apartments	Reserves	Fire Pump Replacement	$75,000	Fall 2018
Total			$700,000	

NEW DEVELOPMENT OPPORTUNITIES

As part of ongoing planning efforts, CHA continues to explore the potential of adding new units at various sites. During the current reporting period, focus has been given to five specific sites as follows:

Millers River	As part of the planned renovations of the 19-story tower at Millers River, CHA has been working with a development team to create a master plan for the 1.6 acre site. The team has developed plans to improve and enhance the properties connection to the main commercial corridor in East Cambridge, Cambridge Street, with plans to replace the one-story community room with a four to six story mixed use building which would contain a combination of commercial and residential uses. In addition, the team is exploring an addition of the main tower and adding some residential units over the existing parking lot.
155 Willow Street	CHA has identified 155 Willow Street, a parking lot across from its Roosevelt Towers development, for possible redevelopment to approximately 20 to 24 units of affordable housing. It is currently working with an architectural team to determine the most cost effective manner to develop these units, and towards finalizing a plan that would enable it to begin a public process during the Spring 2018. Funding for these new units is anticipated to require either an allocation of 9% Low-Income Housing Tax Credits or Private Activity Bonds among other sources.
Roosevelt Towers Mid-Rise	As part of its assessment of the Roosevelt Towers Mid-Rise, CHA and its design team identified the possibility of adding to the back side of the building. This addition would not only add as many as 60 units to the site, but also eliminate a long-standing issue with the location of the elevators. A new addition would allow for two centrally located elevators that would service every unit. Right now, only one elevator services each unit, and when it is not working, residents are required to walk down from as high as eight stories.
Jefferson Park Federal	As noted elsewhere, conditions are quite deteriorated at Jefferson Park Federal. The property meets HUD's definition for obsolescence, and has a number of design defects that are affecting the habitability of units. While CHA had hoped to be able to address some of the worse conditions, CHA has determined that an interim strategy would not sufficiently improve conditions and is currently in the process of vacating approximately 32% of the units. Baker Wohl, the project's architect, completed a study of conditions and found it would be more cost effective to demolish and replace the structures than repair. This replacement strategy has the added benefit of being able to add between 35 to 60 new units at the site.
81 Clifton Place	CHA is exploring to possibility of adding to the existing structure at 81 Clifton Place to provide for some much needed additional family units, and could possibly become a resource for housing veterans with the use of VASH vouchers. In all, the property could support 3 additional units. More notably, the unit mix would change from 9 studio and 11 one bedroom apartments, or twenty beds, to 15 one bedroom, 8 two bedroom and 1 three bedroom apartments, or thirty-one beds.

Efforts to develop these and other new units will continue to be an element of Planning & Development's efforts as its works to upgrade and preserve its existing hard unit stock.

ENERGY AND SUSTAINABILITY

In 2017 CHA's energy program focused primarily on our continued modernization efforts with RAD Phase 1 moving toward completion and RAD Phase 2 in the planning and early construction phase. Three of CHA's RAD Phase 1 projects have been submitted to Enterprise Green Communities (EGC) for certification under their program. EGC is similar to LEED, but focused solely on affordable housing construction and substantial retrofit projects. All of CHA's modernization projects will be certified under this program, signaling CHA's commitment to healthy living environments, resident comfort and energy and water conservation.

With the nearing completion of RAD Phase 1, CHA earned over $2.5 M of energy incentives from the utility as administered by Action for Boston Community Development (Boston ABCD). Aside from the large modernization efforts, CHA and Boston ABCD also completed three comprehensive LED lighting retrofits and provided over 1,500 LED lightbulbs and energy savings devices directly to our residents.

The RAD projects to date have increased CHA's onsite energy generation with the addition of three cogeneration (combined heat and power) plants; increasing CHA's onsite generation to over one half Megawatt, or about 15% of our properties energy use.

CHA continues to closely track energy and water consumption, with significant year over year declines. The Agency is a member of U.S. Department of Energy Better Buildings Challenge program, with the goal of a 20% reduction in energy intensity by 2024. As of this writing, we are well on our way with an 11% reduction over our 2014 baseline. CHA also participates in the Cambridge Energy Disclosure Ordinance, which publicly shares the energy performance of the buildings within our portfolio. CHA staff were selected to present at the United States Green Building Council (USGBC) national Green Build conference as well at the regional North East Sustainable Energy Association (NESEA) conference. CHA participates in the City of Cambridge's Low Carbon Study Committee, Net Zero planning, and Resiliency efforts.

VOLUNTARY COMPLIANCE AGREEMENT

VCA units are handicap-accessible units that CHA has committed to complete as a condition of its Voluntary Compliance Agreement (VCA) with HUD's Office of Fair Housing and Equal Opportunity. Twenty-seven (27) wheel chair accessible units in Public Housing were completed as of July 2017. Construction of ten (10) units are underway. Construction is planned at Millers River in 2019. We will have an estimate of when those units will come on line when plans for Millers River are completed in FY18.

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		03/2018		Units under construction at Jefferson Park
2		06 /2018		Units under construction at Manning Apartments
5		TBD		Units planned for Millers River Apartments
42	**27**			**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.

FY17 RESIDENT PROGRAMS + SERVICES

PROGRAM	HHS SERVED	MTW FUNDS[1]	TOTAL FUNDS[2]	FY HIGHLIGHTS AND UPDATES	OPTIMAL CAPACITY (YEAR)
EARLY CHILDHOOD					
Baby U	30 Families	-	-	34 participants in cohort including 12 fathers and 22 mothers.	40 Families
Baby U Alumni Association	200 Families	-	-	20 trainings/event completed annually.	182 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	$13,150	$15,342	10 youth paired with Harvard mentors for academic year.	15 Youth school yr 30 Youth summer
Work Force	200 Youth	$298,634	$1,332,676	Addition of new grant-funded Alumni Coach position to support alumni.	200 Youth
Work Force College Savings Program	120 banked	-	$114,743	$100,000 in annual funding from foundation with new savings ceiling of $1,500 per student.	200 Youth
This Way Ahead - Gap, Inc.	90 Youth	-	$250,069	16 weeks for training workshops. 45 internships.	100 Youth - 45 summer internships
Big Brother Big Sister Program	100 Youth	-	-	Goal of 125 matches.	110+ Youth
Youthbuild	4 Youth	-	-	Earn GED while building affordable housing	4-6 Youth

PROGRAM	HHS SERVED	MTW FUNDS[1]	TOTAL FUNDS[2]	FY HIGHLIGHTS AND UPDATES	OPTIMAL CAPACITY (YEAR)
ADULT					
Bridge-to-College Program	4 Adults	$8,191	$23,113	Majority of graduates enroll at Bunker Hill Community College.	10 Adults
Community Computer Centers	200 Youth 180 Adults	-	$20,818		200 Youth 180 Adults
Cambridge Employment Program	95 Adults	-	$110,586	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	$225,000	$225,000	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	$221,868	$304,993	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 contracted through CASCAP, Inc.	640 Elderly Adults	$580,796	$699,528	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]	**404 Youth 1,220 Adults 676 Elderly**	**$1,347,639**	**$3,096,868**		

1. MTW Funds are inclusive of block grant commitments from previous years. Funds cover a 21-month FY.
2. Total Funds are inclusive of MTW funds and other resources such as foundation funding, site and program fees, etc. It does not include staff time or voucher costs. Funds cover a 21-month FY.
3. Total count of individuals is not distinct. An individual may be counted more than once if s/he participates in more than one program.

HOUSING INVENTORY

FY17 UNIT AND VOUCHER INVENTORY[1] AND HOUSEHOLDS SERVED - DECEMBER 31, 2017

	HUD Baseline[2]	Vouchers Authorized or PH Units in Place on 12/31/2017	Total Households on 12/31/2017	HH Demographics **(pps 32-33)**	MTW Local Non Traditional **pps 48-49**	MTW Family and Bedroom size **pps 51-52**	Notes
Public Housing Elderly/Disabled		357	376	376		376	Burns (198), Truman (59), 116 Norfolk St. and St. Pauls (55), Weaver and Linnaean (40), 5 Elderly Condos.
Public Housing Family		572	560	561		561	Corcoran Pk (153), Jefferson Park Fed (175), Roosevelt Towers (124), River Howard Homes (32), Willow Street Homes (14), Scattered Sites and Condos (72), St. Pauls (2). HH demographics indicate 1 additional HH (560 vs 561) and suggests that one HH selected more than one race and counted twice.
RAD Elderly/Disabled		419	326	326	0	326	Manning Apartments (198), LBJ Apartments (177), JFK Apartments (44 RAD) Actual total units in JFK building is 69 (44 RAD + 25 PBVs) We count only 44 RAD units under this category.
RAD Family		731	616	616		616	Washington Elms (175), Newtowne Court (268), Putnam Gardens (122), Woodrow Wilson Court (68), Lincoln Way (53 RAD) and Jackson Gardens (45). Actual total units in Lincoln Way building is 70 (53 RAD + 17 PBVs) We count only 53 RAD units under this category.
Former Public Housing Elderly/ Disabled		348	267	267		267	Millers River (297) and Russell (51).
MTW HARD UNITS	**854**	**2,427**	**2,145**				**88% occupancy (2,145/2,427).** Occupancy affected by RAD conversion.
MTW Tenant Based		2,152	1,761	4,129	0	4,129	Inclusive of Non-Expiring Use/Non-Enhanced project- and tenant-based MTW vouchers. Total Households served (1,761+796+1,568) is 4,125. However, HH demographics indicate an additional 4 HHs, suggesting that 2-3 HHs selected more than one race and counted more than once.
MTW Project Based			796				All Non-Expiring Use/Non-Enhanced MTW vouchers are counted under tenant based. 2,152 is inclusive of tenant-based vouchers that have been converted to project-based.
Expiring Use/Enhanced[3]		2,165	1,568				Allocated is inclusive of enhanced non-project based voucher. Count includes Inman (114), Bishop Allen (32), Harwell (39), Smith (132), Rindge (218), Madison (119), Louis Barrett (145), St. Stephens (130), Brookside (168), Cleaves (36), Briston (81), Chauncey (53), Mass Pike (157), 808 Memorial (216), Coes (250), Quincy Towers(160), Landfall (15).
Sponsor-based/ Local Non-Traditional			363	0	370	0	155 sponsor-based vouchers (127 Hard to House + 7 MTW MRVP + 21 PPH-HH) allocated. Households (336 Hard to House + 24 PPH-HH + 3 PPH-TH). MRVP already counted under State Vouchers and PPH-TH are hard units with no HH data attached. CHA has no demographic data for this population.
MTW VOUCHERS	**5,304**	**4,317**	**4,488**				**104% utilization rate. 1:1 sponsor-based voucher to household served yields a 99% utilization rate.**

FY17 UNIT AND VOUCHER INVENTORY[1] AND HOUSEHOLDS SERVED - DECEMBER 31, 2017

	HUD Baseline[2]	Vouchers Authorized or PH Units in Place on 12/31/2017	Total Households on 12/31/2017	HH Demographics **(pps 32-33)**	MTW Local Non Traditional **pps 48-49**	MTW Family and Bedroom size **pps 51-52**	Notes
Federal Non-MTW		574	511	511	N/A	N/A	Voucher allocation includes Mainstream (200), VASH (155), DHVP/NED (100), Mod Rehab (89), and Shelter Care (30).
ALL FEDERAL VOUCHERS		4,891	4,999	N/A	N/A	N/A	102% utilization rate.
ALL FEDERAL ASSISTED		**7,318**	**7,144**				**98% utilization. Includes hard units + vouchers.**
State New Construction		110	108	108	N/A	N/A	Includes Roosevelt Towers (Mid-Rise) and Putnam School.
State and Local Vouchers		174	136	136	N/A	N/A	Voucher funding includes MRVP (103), AHVP (53), Shelter Care (18). There is one HH that did not indicate a race and therefore does not appear in HH demographics for race.
STATE AND LOCAL ASSISTED		**284**	**244**				**86% Utilization**
TOTAL ASSISTED		**7,602**	**7,388**				
Other (No CHA subsidy)		6	6	N/A	N/A	N/A	Includes Porter Road (3/26) and Lancaster (3/65). CHA has no demographic information for this population.
ALL PROGRAMS TOTAL		**7,608**	**7,394**				

1. Non-dwelling units have been removed from the inventory because they do not serve households.
2. Projected FY17 baseline values approved by HUD MTW office on July 5, 2017. The public housing number is limited to units factored in the operating funds calculation. The HCV number includes all RAD and former public housing units that have converted to project-based vouchers. This table will evolve as public housing is transitioned out of CHA's portfolio.
3. We have included the Expiring Use/Enhanced vouchers under MTW to simplify the table. In prior years, this category included only expiring use and enhanced vouchers in its first year of issuance and not yet officially designated as MTW. The non-MTW expiring use vouchers are identified as units preserved in the FY in the Approved MTW Activities section under Expiring Use Preservation.

HOUSEHOLD DEMOGRAPHICS

MTW HARD UNITS AND VOUCHERS
HOUSEHOLDS SERVED - DECEMBER 31, 2017

	HARD UNITS							MTW HCV HOUSEHOLDS		
	PUBLIC HOUSING FAMILY	PUBLIC HOUSING ELDERLY	RAD FAMILY	RAD ELDERLY	FORMER PUBLIC ELDERLY	TOTAL	PERCENT	HOUSE HOLDS	PERCENT	TOTAL
UNIT SIZE										
0 BR	0	179		60	195	434	20%	153	4%	587
1 BR	72	193	116	263	71	715	33%	1,974	48%	2,689
2 BR	228	4	243	3	1	479	22%	1,301	32%	1,780
3 BR	211		208			419	20%	583	14%	1,002
4+ BR	50		49			99	5%	118	3%	217
TOTAL HOUSEHOLDS	561	376	616	326	267	2,146	100%	4,129	100%	6,275
RACE										
American Indian	4	1	4	1	1	11	1%	15	0%	26
Asian	27	11	37	21	11	115	5%	509	12%	624
White	175	174	197	174	174	947	44%	1,876	45%	2,823
Black/African American	353	77	378	124	77	1,059	49%	1,726	42%	2,785
Native Hawaiian/Other Pacific	2	4	0	6	4	14	1%	3	0%	17
TOTAL HOUSEHOLDS	561	376	616	326	267	2,146	100%	4,129	100%	6,275
ETHNICITY										
Hispanic	87	22	93	28	32	262	12%	661	16%	923
Non-Hispanic[7]	474	354	523	298	235	1,884	88%	3,468	84%	5,352
TOTAL HOUSEHOLDS	561	376	616	326	267	2,146	100%	4,129	100%	6,275
INCOME[2]										
At 30 AMI or below	289	312	315	280	228	1,424	66%	2,873	70%	4,297
Over 30 AMI – 50 AMI	136	42	160	37	30	405	19%	903	22%	1,308
Over 50 AMI – 60 AMI	37	12	34	8	7	98	5%	179	4%	277
Over 60 AMI – 80 AMI	55	9	46	1	1	112	5%	131	3%	243
Over 80 AMI	44	1	61	0	1	107	5%	43	1%	150
TOTAL HOUSEHOLDS	561	267	616	326	267	2,146	100%	4,129	100%	6,275
CAMBRIDGE RESIDENT										
Cambridge	561	267	616	326	267	2,146	100%	2,122	51%	4,268
Outside Cambridge	0	0	0	0	0	0	0%	2,007	49%	2,007
TOTAL HOUSEHOLDS	561	267	616	326	267	2,146	100%	4,129	100%	6,275

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

FEDERAL NON-MTW, NEW CONSTRUCTION AND STATE
HOUSEHOLDS SERVED - DECEMBER 31, 2017

	NEW CONSTRUCTION		FEDERAL NON-MTW		STATE + LOCAL VOUCHERS		
	HOUSEHOLDS	PERCENT	HOUSEHOLDS	PERCENT	HOUSEHOLDS	PERCENT	TOTAL
UNIT SIZE							
0 BR	14	13%	118	23%	53	39%	185
1 BR	83	77%	340	67%	46	34%	469
2 BR	11	10%	38	7%	18	13%	67
3 BR	0	0%	11	2%	13	10%	24
4+ BR	0	0%	4	1%	6	4%	10
TOTAL HOUSEHOLDS	108	100%	511	100%	136	100%	755
RACE							
American Indian	0	0%	5	1%	1	1%	6
Asian	5	5%	9	2%	6	4%	20
White	59	55%	304	59%	76	56%	439
Black/African American	42	39%	192	38%	52	39%	286
Native Hawaiian/Other Pacific	2	2%	1	0%	0	0%	3
TOTAL HOUSEHOLDS	108	100%	511	100%	135	100%	754
ETHNICITY							
Hispanic	10	9%	46	9%	18	13%	74
Non-Hispanic[7]	98	91%	465	91%	118	87%	681
TOTAL HOUSEHOLDS	108	100%	511	100%	136	100%	755
INCOME[2]							
At 30 AMI or below	82	76%	442	86%	112	82%	636
Over 30 AMI – 50 AMI	22	20%	47	9%	16	12%	85
Over 50 AMI – 60 AMI	3	3%	11	2%	1	1%	15
Over 60 AMI – 80 AMI	0	0%	8	2%	3	2%	11
Over 80 AMI	1	1%	3	1%	4	3%	8
TOTAL HOUSEHOLDS	108	100%	511	100%	136	100%	755
CAMBRIDGE RESIDENT							
Cambridge	108	100%	243	48%	117	86%	468
Outside Cambridge	0	0%	268	52%	19	14%	287
TOTAL HOUSEHOLDS	108	100%	511	100%	136	100%	755

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 – DECEMBER 31, 2017

	Units Available	Units Occupied	Younger Disabled Households	Percent of Units Available[1]	Percent of Occupied Units
116 Norfolk Street	37	36	8	21.6%	22.2%
D.F Burns Apartments*	196	196	28	14.3%	14.3%
Elderly Condos*	5	5	0	0.0%	0.0%
H.S. Truman Apartments*	59	54	11	18.6%	20.4%
J.F. Kennedy*	44	43	3	6.8%	7.0%
Linnaean Street*	19	18	2	10.5%	11.1%
L.B. Johnson Apartments*	177	165	20	11.3%	12.1%
F.J. Manning Apartments*	194	123	12	6.2%	9.8%
Millers River Apartments*	295	283	45	15.3%	15.9%
Putnam School	33	31	3	9.1%	9.7%
R.C. Weaver Apartments*	20	18	4	20.0%	22.2%
Roosevelt Midrise	75	72	22	29.3%	30.6%
L.J. Russell Apartments*	29	26	4	13.8%	15.4%
St. Pauls Residence	18	12	6	33.3%	50.0%
GRAND TOTAL	**1,201**	**1,082**	**168**	**14.0%**	**15.5%**

1. CHA uses the State's threshold of 13.5% for the entire portfolio not for each individual property. As units become available CHA works towards raising the percentage of young disabled in non-compliant properties. These numbers should not be confused to represent the developments and requirements under CHA's Designated Housing Plan (DHP).

* Indicates buildings in CHA's Designated Housing Plan.

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. In FY17 the HCV waitlist and elderly disabled CHA unit waitlists were opened. With the inclusion of site-based waitlists in HCV we can distinguish unit types. All applicants on the tenant-based waitlist are included under HCV family. At fiscal year end, there were 15,482 distinct applicants that generated 87,815 applications or an average of nearly 6 applications per applicant.

CHA WAITLIST INFORMATION - DECEMBER 31, 2017

DISTINCT APPLICANTS	PROGRAM	DISTINCT APPLICANTS BY PROGRAM	UNIT TYPE	DISTINCT APPLICANTS BY UNIT TYPE	TOTAL APPLICATIONS
	CHA Units Elderly/Disabled	1,491	Elderly/Disabled	3,328	
	CHA Units Family	3,989	Family	13,745	
	HCV Elderly/Disabled	1,837	Single Room Occupancy (SRO)	1,817	
15,482	HCV Family	9,756			**87,815**
	Single Room Occupancy (SRO)	1,817			
	Total	18,890	Total	18,890	

CHA WAITLISTS BY - DISTINCT APPLICANTS IN EACH PROGRAM GROUP – BY RACE AND ETHNICITY – DECEMBER 31, 2017

	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	25	2%	139	9%	513	34%	12	1%	785	53%	16	1%	189	13%	1,292	87%	10	1%	1,494
CHA UNITS FAMILY	23	1%	248	6%	1,737	44%	43	1%	1,648	41%	290	7%	1,069	27%	2,642	66%	278	7%	3,989
HCV ELDERLY/DISABLED	41	2%	94	5%	719	39%	19	1%	941	51%	22	1%	280	15%	1,554	85%	3	0%	1,837
HCV FAMILY	149	2%	374	4%	5,808	60%	218	2%	3,108	32%	98	1%	2,503	26%	7,249	74%	4	0%	9,756
SINGLE ROOM OCCUPANCY (SRO)	35	2%	58	3%	963	53%	48	3%	636	35%	76	4%	365	20%	1,341	74%	111	6%	1,817
TOTAL	**273**	**1%**	**913**	**5%**	**9,740**	**52%**	**340**	**2%**	**7,118**	**38%**	**502**	**3%**	**4,406**	**23%**	**14,078**	**75%**	**406**	**2%**	**18,890**

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

CHA WAITLISTS BY - DISTINCT APPLICANTS IN EACH PROGRAM GROUP – BY INCOME – DECEMBER 31, 2017

	$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	146	10%	1,140	76%	147	10%	23	2%	23	2%	12	1%	1,494
CHA UNITS FAMILY	652	16%	2,760	69%	460	12%	62	2%	26	1%	29	1%	3,989
HCV ELDERLY/DISABLED	144	8%	1,462	80%	196	11%	21	1%	12	1%	5	0%	1,837
HCV FAMILY	640	7%	6,564	67%	2,248	23%	185	2%	75	1%	44	0%	9,756
SINGLE ROOM OCCUPANCY (SRO)	232	13%	2,474	69%	284	16%	31	2%	14	1%	9	0%	1,817
TOTAL	**1,814**	**10%**	**13,173**	**70%**	**3,335**	**18%**	**322**	**2%**	**150**	**1%**	**96**	**1%**	**18,890**

1. Count of waitlist applicants that indicated they had no income on their applications. Applicants have not yet been prescreened to determine actual income.

The following provides a 5-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 FY12-FY16 are for federal public housing only. Total numbers for FY12 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, 2017

	FY12	FY13	FY14	FY15	FY16[1]	FY17
CHA FAMILY						
1 BR	569	420	399	390	316	284
2 BR	2,668	2,525	2,676	3,693	2,569	2,298
3 BR	1,244	1,372	1,379	1,785	1,214	1,199
4+ BR	224	272	278	249	213	208
SUBTOTAL	4,705	4,589	4,732	6,084	4,312	3,989
CHA ELDERLY/DISABLED						
Studio or 1 BR	2,357	2,541	2,980	2,787	2,151	1,410
2 BR	69	94	114	154	106	81
SUBTOTAL	2,426	2,635	3,094	2,921	2,045	1,491
HCV ELDERLY/DISABLED						
Studio or 1 BR						1,837
2 BR			N/A			
SUBTOTAL						1,837
HCV FAMILY						
Studio or 1 BR						5,982
2 BR						2,559
3 BR			N/A			979
4 BR						236
SUBTOTAL						9,756
SINGLE ROOM OCCUPANCY (SRO)						
SRO			N/A			1,817
TOTAL	**10,897**	**11,265**	**11,483**	**10,422**	**9,208**	**18,890**

SOURCES + USES OF FUNDING

The following tables reflect a 21-month fiscal year (April 1, 2016-December 31, 2017). In FY17, CHA received approximately $157 million in MTW funds. A total of over $105 million represent Housing Assistance Payments to landlords, with $4 million expended from the HUD Capital Fund. Other uses of the funds include $7.6 million restricted to Millers River for capital and operating needs. CHA designated $2 million in admin fees for modernization efforts. An additional $5 million in the form of MTW Program loans was used for Manning Apts construction and $1 million towards the new Jefferson Park Apartments which was previously state public housing.

MOVING TO WORK FUNDS - FY17

	Federal Public Housing	MTW Housing Choice Vouchers	MTW Funds for RAD Sites	Capital Fund	Total MTW Actual Funds
SOURCES					
Tenant Revenue	$9,1666,308	-	-	-	$9,166,308
Subsidy Revenue	$13,569,582	$110,607,044	$19,318,222	$4,094,043	$147,588,892
Other Revenue	$196,362	-	-	-	$196,362
TOTAL SOURCES	**$22,932,252**	**$110,607,044**	**$19,318,222**	**$4,094,043**	**$156,951,562**
USES					
Administrative Salaries, Taxes, and Benefits	$1,935,448	$5,085,954	-	$409,404	$7,430,807
Maintenance Labor, Taxes, and Benefits	$3,212,016	-	-	-	$3,212,016
Tenant Services	$625,822	$383,926	-	-	$1,009,748
Materials & Supplies, Contract Costs	$3,434,494	-	-	-	$3,434,494
General Expenses	$4,457,949	$2,111,447	-	-	$6,569,396
Utilities	$3,284,767	-	-	-	$3,284,767
Housing Assistance Payments (HAP)	-	$87,802,411	$17,282,058	-	$105,084,469
Capital Improvements	-	-	-	$3,684,639	$3,684,639
TOTAL USES	**$16,950,496**	**$95,383,738**	**$17,282,058**	**$4,094,043**	**$133,710,336**
CASH BEFORE BLOCK GRANT TRANSFERS	**$5,981,756**	**$15,223,306**	**$2,036,164**	**$0**	**$23,241,226**
Transfers to Block Grant and COCC	($1,600,000)	($1,797,230)	-	-	($3,397,230)
Transfers to Resident Services	($500,000)	-	-	-	($500,000)
Admin Fees Used for Modernization Transfers	-	-	($2,036,164)	-	($2,036,164)
Transfers to Millers River	($2,610,500)	($4,993,817)	-	-	($7,604,317)
MTW Program Loan Funds	-	($6,094,156)	-	-	($6,094,156)
NET SURPLUS (DEFICIT)	**$1,271,256**	**$2,338,103**	**$0**	**$0**	**$3,609,359**

OTHER FEDERAL FUNDS - FY17

Other Federal Programs consists of federal non-MTW voucher programs: special purpose voucher programs including Non-Elderly Disabled Designated Housing Voucher Programs (NED/DHVP), Veterans Affairs Supported Housing Programs (VASH), Mainstream and preservation programs. Resident Services receives nominal HUD funds, continues to receive outside funding from other non-federal sources, including private foundations and grants, to support the various programs.

	Non-MTW Vouchers	Non-Elderly Disabled (NED) and VASH	Resident Services	Total Other Federal Funds
SOURCES				
HUD Grants	$14,391,800	$4,852,037	$46,017	$19,289,854
Other Receipts	-	-	$2,644,205	$2,644,205
Transfers from Public Housing	-	-	$500,000	$500,000
TOTAL SOURCES	**$14,391,800**	**$4,852,037**	**$3,190,222**	**$22,434,059**
USES				
Administrative	$887,604	$421,877	$1,599,331	$2,908,811
Tenant Services	-	-	$1,452,478	$1,452,478
HAP Payments	$12,111,805	$4,351,129	-	$16,462,934
TOTAL USES	**$12,999,409**	**$4,773,006**	**$3,051,809**	**$20,824,223**
NET SURPLUS (DEFICIT)	**$1,392,391**	**$79,031**	**$138,413**	**$1,609,835**

STATE FUNDS - FY17

The State funds approximately $3.4 million, which is split between the Massachusetts Rental Voucher Program (MRVP) at 156 vouchers, and 110 hard units funded under the State's New Construction program. MRVP required $144,547 from Block Grant funds to cover the operating deficits due to lower administrative fees which do not support the operating costs of administering the program.

		Total MRVP	Total State Public Housing	Total State Funds
SOURCES				
	Tenant Revenue		$1,005,870	$1,005,870
	Operating Subsidy	$1,952,928	$1,424,261	$3,377,189
	Operating Transfers In / Block Grant	$144,547	-	$144,547
	TOTAL SOURCES	$2,097,475	$2,430,131	$4,527,606
USES				
	Administrative	$263,542	$541,179	$804,721
	Tenant Services	-	$29,974	$29,974
	Maintenance Labor	-	$267,835	$267,835
	Materials and Contract Costs	-	$688,348	$688,348
	General Expenses	-	$316,727	$396,274
	Rent Payments	$1,830,247	-	$1,830,247
	Utilities	-	326,767	$326,767
	Capital Improvements	-	-	-
	TOTAL USES	**$2,093,789**	**$2,170,830**	**$4,264,619**
	NET SURPLUS (DEFICIT)	**$3,386**	**$259,301**	**$262,987**

NON-FEDERAL FUNDS AND OTHER DEVELOPMENT SOURCES AND USES - FY17

Non-Federal funds are fees earned by CHA for services performed, such as inspections and certifications that pertain to third party leased or public housing programs. Additionally, non-federal funds include one-time fees earned for the initial work required to absorb new preservation programs and other income, such as grant income received for energy conservation efforts. Commitments of Unspent Funds represent CHA's obligations over the next 3 years for modernization.

	Actual
CASH BALANCE - 4/1/2016	$41,674,057
SOURCES	
Leased Housing Ancillary Fee Income	$101,427
MTW Transfers - RAD Admin Fees	$2,036,164
Development Fee Income	$3,107,077
TOTAL SOURCES	**$46,918,725**
USES	
Administrative Salaries and Benefits	$147,097
Administrative Costs and Overhead	$26,255
Development Fee transfer to Block Grant	$3,107,077
Transfers to CHA Affordable Lending Corps	$8,000,000
CHA Program Loans to LLCs	$23,408,027
TOTAL USES	**$34,688,456**
FUND BALANCE - 12/31/2017	**$12,230,270**
COMMITMENTS OF UNSPENT FUNDS	
Putnam Gardens LLC	$4,453,721
Newtowne Court LLC	$5,135,205
Manning Apartments LLC	$4,015,525
Russell Apartments LLC	$6,475,000
TOTAL COMMITMENTS	**$20,079,451**

CENTRAL OFFICE COST CENTER - FY17

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.

	Actual
SOURCES	
Total Management Fees	$7,166,266
Fee-for-Service	$2,606,966
Transfer in public housing reserve	$1,600,000
TOTAL SOURCES	**$11,373,232**
USES	
Salaries	$4,170,059
Benefits	$2,010,285
Central Maintenance Labor and Materials	$1,888,172
Administrative Contracts	$307,819
Office Rent	$468,150
Other Administrative Overhead	$978,049
Other Post Employment Benefit Costs	$1,320,302
TOTAL USES	**$11,142,835**
NET SURPLUS (DEFICIT)	**$230,398**

MTW BLOCK GRANT - FY17

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.

In FY17, the MTW Block Grant received $2.8 million from the Housing Choice Voucher Program. The funds were used for various block grant activities approved by HUD.

	ACTUAL
ESTIMATED BEGINNING CASH – 4/1/2016	$1,607,361
SOURCES OF CASH	
MTW Transfer	$2,828,411
Non Federal Transfer- Development Fee Income	$3,107,077
Proceeds from Russell Apartments disposition[1]	$2,290,000
Other Sources	$30,981
TOTAL SOURCES	**$9,863,831**
USES OF CASH	
Operating Transfers	
Transfers to MRVP/State Housing	$144,547
P&D Admin Support and Working Capital	$3,881,924
P&D Mixed Finance Working Capital	$193,493
Loan Transfers to Mixed Finance LLCs	$2,568,335
Policy + Technology Lab and MTW Initiatives	$583,242
TOTAL USES	**$7,371,542**
ENDING FUND BALANCE - 12/31/2017	**$2,492,290**

1. In Q1 2018, $2,290,000 was transferred to the NonFederal and Other Development Fund to be used for other modernization efforts.

HUD REQUIREMENTS
HOUSING STOCK

New Housing Choice Vouchers that were Project-Based During the Fiscal Year

Property Name	Anticipated Number of New Vouchers to be Project-Based	Actual Number of New Vouchers that were Project-Based**	Description of Project
Landfall Apartments	0	15	The property is located at 72 Marginal Street in East Boston, MA. The building consists of 15 units of elderly/disabled housing.
Port Landing	0	8	The property is located at 131 Harvard Street in Cambridge, MA. The building consists of 20 units of family housing.
Quincy Tower	0	4	The property is located at 5 Oak Street in Boston, MA. The building consists of 162 units of elderly housing.
Auburn Court III	0	8	The property is located at 3 Brookline Place in Cambridge, MA. The property consists of 78 units of family housing (individuals and families).
Elm Street	0	1	The property is located at 72 Elm Street in Cambridge, MA.
Otis Street	0	3	The property is located at 206-220 Otis Street in Cambridge, MA. Three units were added to an existing PBA contract at the same site, for a total of 8 units.
Churchill Court	0	1	The property is located at 2507-2527 Massachusetts Avenue in Cambridge, MA. One unit was added to an existing PBA contract at the same site, for a total of 8 units.
Total	**0**	**40**	

Anticipated Total Number of New Vouchers to be Project-Based[1]	Actual Total Number of New Vouchers that were Project-Based[2]
0	40

Anticipated Total Number of Project-Based Vouchers Committed at the End of the Fiscal Year[1]	Anticipated Total Number of Project-Based Vouchers Leased Up or Issued to a Potential Tenant at the End of the Fiscal Year[1]
2,160	2,160

Actual Total Number of Project-Based Vouchers Committed at the End of the Fiscal Year[3]	Actual Total Number of Project-Based Vouchers Leased Up or Issued to a Potential Tenant at the End of the Fiscal Year[4]
2,261	2,168

1. From the Plan.
2. The number of new vouchers that were project-based includes total vouchers attached to a HAP contract.
3. The FY16 Report stated that there were 2,435 actual vouchers commited at FY end. The number included backup vouchers that technically were not attached to a HAP contract and 98 units at JP State. In fact, there are 104 units at JP State. For this Report we are not including the 104 units at JP state because the site is still under construction. No units are under lease and including them would skew utilization. If we adjust FY16 numbers to reflect neither backups nor the 98 JP State units, actual vouchers committed would 2,220 units. Between FY16 and FY17, some backup units have moved under contract. The balance of voucher movement between backup and "under contract" results in 41 more units in this Report than in the FY16 Report. This is in line with the 40 vouchers that are newly project-based.
4. Utilization is at 96%. If we were to include 104 JP state units in the count, utilization would decrease to 92% (2,168/2,365).

Other Changes to the Housing Stock that Occurred During the Fiscal Year

A total of 523 relocation moves occurred during the fiscal year. In some instances a household may have moved more than once. The table below summarizes all moves, including moves related to Temple Place, Bishop Allen, and the Squirrel Building. The numbers were effective 1/17/18.

	Russell	Putnam Gardens	Newtowne Court	Manning Apts	Total
Moved within same development		81	228	111	420
Moved to different CHA development	23	21	30	5	79
Moved to project-based Voucher in Cambridge		3	2	1	6
Moved with tenant-based Voucher in Cambridge					
Moved with tenant-based voucher outside of Cambridge					
Moved in with family			2	1	3
Returned to original unit from off-site (as of 8/9/17)		1	5		6
Miscellaneous (e.g. moved to nursing home)		1	4	4	9
TOTAL IN FY	**23**	**107**	**271**	**122**	**523**
TOTAL TO-DATE	23	150	344	188	705

General Description of Actual Capital Fund Expenditures During the Plan Year

CAPITAL EXPENDITURES SINCE APRIL 30, 2016

Construction	FY17 Budget	No. of Units	Nature of work	9 mos-FY16	12 mos-CY17	Total 21 mos-FY17
Temple Revitalization	$25,000	40	New Construction	$966,818	$2,898	$969,716
JP Revitalization	$32,115,834	104	New Construction	$13,363,526	$25,387,361	$39,023,887
Manning Revitalization	$23,473,125	198	RAD	$28,403,019	$22,225,356	$50,628,375
Newtowne Court Revitalization	$17,225,130	268	RAD	$12,810,630	$14,983,242	$27,793,872
Washington Elms Revitalization	$15,957,468,	175	RAD	$13,336,684	$7,158,665	$20,495,349
Putnam Gardens Revitalization	$5,786,087	122	RAD	$4,128,641	$8,538,538	$12,667,179
Woodrow Wilson Court Revitalization	$50,000	68	RAD	$804,055	-	$804,055
JFK Modernization	$700,000	69	RAD	$32,000	$677,543	$709,543
RAD Phase 2 - Various	$1,000,000	51	DISPO	-	$135,627	$135,627
Selective Modernization - Various Sites	$250,000	831	-	$79,378	$1,122,522	$1,201,900
HVAC Improvements at 119 Windsor Street	$450,000	n/a	Capital Improvement	-	-	-
Retiring Construction Loans	$5,160,000	n/a	New Construction/RAD	$2,158,096	$4,348,200	$6,506,296
Construction Total	**$102,192,644**	**1926**		**$76,355,847**	**$84,579,952**	**$160,935,799**

Overview of Other Housing Owned and/or Managed by the PHA at Fiscal Year End		
Housing Program *	**Total Units****	
Other	3	26-unit residential building located at 78-80 Porter Road in Porter Square, Cambridge. There are 3 market-rate units. Remaining units use subsidies (CHA-issued and mobile vouchers issued by other agency)
Other	3	65-unit apartment complex located at 8-10 Lancaster Street. LIHTC, the Cambridge Affordable Housing Trust and CHA MTW funds were used to rehab the building. There are 3 market-rate units. Remaining units are CHA MTW subsidized.
Other	0	20-unit residential building located in mid-Cambridge at 195 Prospect Street. All units house either CHA-issued voucher holders or mobile voucher holders from other agencies.
Other	0	8-unit building located in Cambridgeport at 22 Lopez. All units are occupied by a local non-profit and use CHA sponsor-based vouchers. Building use has been consistent for many years, but was incorrectly documented in the FY15 Report.
Total Other Housing Owned and/or Managed	6	

*** Select Housing Program from:** Tax-Credit, State Funded, Locally Funded, Market-Rate, Non-MTW HUD Funded, Managing Developments for other non-MTW Public Housing Authorities, or Other.
** Total Units include only units that are not subsidized by a housing voucher.

If Other, please describe:	Mixed-finance development made up of Tax Credit, PBV, TBV and moderate/market rate units.

LEASING INFORMATION

Actual Number of Households Served at the End of the Fiscal Year

Housing Program:	Number of Households Served*	
	Planned	Actual
Number of Units that were Occupied/Leased through Local Non-Traditional MTW Funded Property-Based Assistance Programs **	0	0
Number of Units that were Occupied/Leased through Local Non-Traditional MTW Funded Tenant-Based Assistance Programs **CHA Note 1	155 (FY16 Report stated 139)	370
Port-In Vouchers (not absorbed)	0	0
Total Projected and Actual Households Served	155 (FY16 Report stated 139)	370

* Calculated by dividing the planned/actual number of unit months occupied/leased by 12. Planned numbers reflect vouchers issued and assumes one (1) unit serves one (1) household (1:1). Actual numbers reflect households served. See CHA Note 1.

** In instances when a Local, Non-Traditional program provides a certain subsidy level but does not specify a number of units/Households Served, the PHA should estimate the number of Households served.

CHA Note 1: Voucher count includes 7 MRVP under MTW Activity HC.2001.01 - Use MTW Resources to Augment State MRVP Leasing Program, 127 vouchers under HC.2008.03 Sponsor-based Voucher program, and 21 vouchers under HC.2008.03A Pathways to Permanent Housing - Heading Home. Actual households include 336 Hard-to-House + 24 PPH-Heading Home + 7 MRVP + 3 PPH-TH in CHA hard units.

Housing Program:	Unit Months Occupied/Leased****	
	Planned	Actual
Number of Units that were Occupied/Leased through Local Non-Traditional MTW Funded Property-Based Assistance Programs ***	0	0
Number of Units that were Occupied/Leased through Local Non-Traditional MTW Funded Tenant-Based Assistance Programs ***	3,255	3,255
Port-In Vouchers (not absorbed)	0	0
Total Projected and Annual Unit Months Occupied/Leased	3,255	3,255

*** In instances when a local, non-traditional program provides a certain subsidy level but does not specify a number of units/Households Served, the PHA should estimate the number of households served.

**** Unit Months Occupied/Leased is the total number of months the housing PHA has occupied/leased units, according to unit category during the year.

	Average Number of Households Served Per Month	Total Number of Households Served During the Year
Households Served through Local Non-Traditional Services Only	0	0

Reporting Compliance with Statutory MTW Requirements: 75% of Families Assisted are Very Low-Income

HUD will verify compliance with the statutory objective of "assuring that at least 75 percent of the families assisted by the Agency are very low-income families" is being achieved by examining public housing and Housing Choice Voucher family characteristics as submitted into the PIC or its successor system utilizing current resident data at the end of the agency's fiscal year. The PHA will provide information on local, non-traditional families provided with housing assistance at the end of the PHA fiscal year, not reported in PIC or its successor system, in the following format:

Fiscal Year:	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**[1]
Total Number of Local, Non-Traditional MTW Households Assisted	n/a	n/a	87	169	**281**	370
Number of Local, Non-Traditional MTW Households with Incomes Below 50% of Area Median Income	n/a	n/a	87	169	**281**	369
Percentage of Local, Non-Traditional MTW Households with Incomes Below 50% of Area Median Income	n/a	n/a	100%	100%	**100%**	99.7%

1. Households include 336 Hard to House + 24 PPH-HH + 3 PPH-TH + 7 MRVP.

Reporting Compliance with Statutory MTW Requirements: Maintain Comparable Mix

In order to demonstrate that the statutory objective of "maintaining a comparable mix of families (by family size) are served, as would have been provided had the amounts not been used under the demonstration" is being achieved, the PHA will provide information in the following formats:

CHA NOTE: Pursuant to the revised HUD 50900 implemented by HUD in May 2013, MTW agencies are required to provide data on the number of persons in each household served as of the date of entry to the MTW program and as of the current fiscal year. CHA has historically provided bedroom size data to meet MTW compliance. Therefore, the mix of bedroom count from April 1998 has been provided as the baseline comparison. 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.

BASELINE FOR THE MIX OF FAMILY SIZES SERVED - 2014

Family Size:	Occupied Number of Public Housing units by Household Size when PHA Entered MTW	Utilized Number of Section 8 Vouchers by Household Size when PHA Entered MTW	Non-MTW Adjustments to the Distribution of Household Sizes *	Baseline Number of Household Sizes to be Maintained	Baseline Percentages of Family Sizes to be Maintained
1 Person	N/A	N/A	N/A	2,270	50.0%
2 Person	N/A	N/A	N/A	999	22.0%
3 Person	N/A	N/A	N/A	609	13.4%
4 Person	N/A	N/A	N/A	372	8.2%
5 Person	N/A	N/A	N/A	194	4.3%
6+ Person	N/A	N/A	N/A	94	2.1%
Totals	N/A	N/A	N/A	4,538	100%

Explanation for Baseline Adjustments to the Distribution of Household Sizes Utilized	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

	1 Person	2 Person	3 Person	4 Person	5 Person	6+ Person	Totals
Baseline Percentages of Household Sizes to be Maintained	50%	22%	13%	8%	4%	2%	**99%**
Number of Households Served by Family Size this Fiscal Year*	3,193	1,448	803	479	242	110	**6,275**
Percentages of Households Served by Household Size this Fiscal Year 2016	51%	23%	13%	8%	4%	2%	**101%**
Percentage Change (compared to FY14)	**+1%**	**+1%**	**+0%**	**+0%**	**+0%**	**+0%**	

*Aggregate of public housing, RAD, former public housing and MTW vouchers (tenant-based, project-based, and expiring-use/enhanced). Does not include vouchers issued but not yet leased up.

Justification and Explanation for Family Size Variations of Over 5% from the Baseline Percentages	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 Bedroom Count - Occupied

	Bedroom Size in April 1998				Bedroom Size in December 2017					
	HARD UNITS	VOUCHERS			HARD UNITS			VOUCHERS		
	Public Housing	HCV	Total	% by BR size**	Public Housing	RAD	Former Public Housing	HCV*	Total	% by BR size**
1 Bedroom/SRO	890	398	1,288	41%	444	439	195	2,127	3,276	52%
2 Bedroom	447	537	984	31%	232	246	71	1,301	1,780	28%
3 Bedroom	363	342	705	23%	211	208	1	583	1,002	16%
4+ Bedroom	101	51	152	5%	50	49	0	118	217	3%
TOTAL	1,801	1,328	3,129	100%	937	942	267	4,129	6,275	100%

Percentage change between 1998 and 2017 reflect the substantial increase in units added to CHA's portfolio as a result of expiring use activities and conversion of former state public housing to MTW federal public housing and RAD.

*HCV counts are of voucher sizes on 12/31/2017
**Percentages may not add to 100% due to rounding.

Description of any Issues Related to Leasing of Public Housing, Housing Choice Vouchers or Local, Non-Traditional Units and Solutions at Fiscal Year End

Housing Program	Description of Leasing Issues and Solutions
Public Housing/RAD/Former public housing (Section 18)	Ongoing RAD conversion and Section 18 disposition has resulted in frequent relocation and holding of units for residents.

Number of Households Transitioned To Self-Sufficiency by Fiscal Year End

Activity Name/#	Number of Households Transitioned *	Agency Definition of Self Sufficiency	
FSS+/SS.2013.01 (**p 54**)	276	Reduction in Subsidy (RIS)	
	10	End of Subsidy (EOS)	
Sponsor-Based Voucher/HC.2008.03 (**p 62**)	5	End of Subsidy (EOS)	
RSP/PH/RAD/CE.2006.01 (**p 86**)	32	End of Subsidy (EOS)	

Households Duplicated Across Activities/Definitions	0 households duplicated across EOS.
ANNUAL TOTAL NUMBER OF HOUSEHOLDS TRANSITIONED TO SELF SUFFICIENCY	47

* The number provided here should match the outcome reported where metric SS #8 is used.

WAITLIST INFORMATION

Waitlist Information at Fiscal Year End - December 31, 2017

Housing Program(s) *	Waitlist Type **	Number of Households on Waitlist	**Waitlist Open, Partially Open or Closed *** **	**Was the Waitlist Opened During the Fiscal Year**
Family Housing (Includes MTW and non-MTW)	Site-Based	3,989	Closed	No
Family Housing (Includes MTW and non-MTW)	Site-Based	1,491	Open	Yes
HCV Program (MTW and non-MTW that are not SROs) - includes elderly/disabled and family.	Site-Based and Community-Wide	11,593	Open	Yes
HCV SRO ONLY (MTW and Non-MTW)	Community-Wide	1,817	Open	N/A

** Select Housing Program*: Federal MTW Public Housing Units; Federal MTW Housing Choice Voucher Program; Federal non-MTW Housing Choice Voucher Units; Tenant-Based Local, Non-Traditional MTW Housing Assistance Program; Project-Based Local, Non-Traditional MTW Housing Assistance Program; and Combined Tenant-Based and Project-Based Local, Non-Traditional MTW Housing Assistance Program.

*** Select Waitlist Types:* Community-Wide, Site-Based, Merged (Combined Public Housing or Voucher Waitlist), Program Specific (Limited by HUD or Local PHA Rules to Certain Categories of Households which are Described in the Rules for Program Participation), None (If the Program is a New Waitlist, Not an Existing Waitlist), or Other (Please Provide a Brief Description of this Waitlist Type).

*** For Partially Open Waitlists, provide a description of the populations for which the waiting list is open.

n/a

If Local, Non-Traditional Program, please describe:

n/a

If Other Waitlist Type, please describe:

n/a

If there are any changes to the organizational structure of the waitlist or policy changes regarding the waitlist, provide a narrative detailing these changes.

All waitlist application are accepted online only through a web-based application portal unless a reasonable accomodation request for a paper-based submission is made. This new platform was instituted in October 2016 when CHA re-opened its HCV waitlist. In addition, owner-managed site-based waitlists (SBWL) were established so that applicants have more choice in selecting specific buildings with project-based units. The site-based lists are organized according to the owner of the building. An owner may own several project-based buildings.

In May 2017, CHA modified its SRO waitlist policy so that waitlist preferences do not apply to the SRO waitlist and what was 2 SRO waitlists has been consolidated into one centralized SRO waitlist. The waitlist was open throughout the process.

In July 2017, CHA re-opened its elderly/disabled housing waitlist and modified policy so that applicants are no longer limited to selecting 3 elderly/disabled sites-based lists and may select as many lists as meets their needs.

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.

The Rent-to-Save pilot takes a different approach and CHA automatically creates Rent-to-Save accounts for all residents at Jefferson Park Federal and Corcoran Park. One percent (1%) of rent charged is automatically put into the resident's account each month during the pilot period. If an increase in rent charged occurs as a result of a change in income (and not for other reasons such as a change in unit size), fifty (50) percent of the difference is also put into the account. Quarterly account statements are sent to all RTS households. Compass financial coaching is offered only to Jefferson Park Federal residents while Corcoran Park residents receive the account only. At the end of the pilot, residents may access their account balances as long as they meet the program requirements.

IMPACT

FSS: The first FSS+ graduate completed the program on November 30, 2013 (FY14).

CHANGES TO BENCHMARKS, BASELINE, METRICS

None for HCV. Benchmark values for RTS were not set in the FY17 Plan. Outcome values for FSS+ and RTS are consistent with benchmarks set in the FY18 Plan. Rent-to-Save program design had not yet been finalized at the time that the CHA's FY16 Plan was prepared.

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 that will have been in the program for at least one year and experience an increase in earnings**: $33,000	All FSS+ participants: 192 Average Earned Income for all FSS+ participants: $39,852 FSS+ participants that have been in the program for at least one year and experience an increase in earnings:138 **Average Earned Income for FSS+ participants that have been in the program for at least one year and experience an increase in earnings**: $38,304 **Average Earned Income for all RTS participants**: $23,970 JP Enrolled in coaching: $33,164 JP Total: $23,518 CP: $24,708 Average earned income of RTS participants that have earned income: $37,532 JP Enrolled in coaching: $46,983 JP Total: $38,217 CP: $36,815	Yes.

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

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:** $1,700	**FSS+ participants that have been in the program for at least one year and established an account** $3,784 **Total RTS participants:** $550 JP Enrolled in coaching: $1,007 JP Total: $581 CP: $510	Yes.
SS #5: Households Assisted by Services that Increase Self Sufficiency				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Number of households receiving services aimed to increase self sufficiency (increase).	0 households	251 households	**FSS+ participants:** 192 **Total RTS participants:** 321 JP Enrolled in coaching: 34 JP Total: 169 CP: 149 There are 3 households still in enrolled in RTS but moved out of their RTS unit.	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: 128 **Avg Housing Assistance Payment (HAP) at FSS+ enrollment for participants that have been in the program for at least one year:** $988	FSS+ Participants that have been in the program for at least one year: 138 **Avg HAP of FSS+ participants that have been in the program for at least one year:** $942 **Avg subsidy of RTS participants based on ceiling rent:** $579 JP Enrolled in coaching: $509 JP Total: $574 CP: $588	Yes.

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

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	$89,000	**<u>Monthly</u> TTP aggregated for FSS+ participants that have been in the program for at least one year:** $131,501 **<u>Monthly</u> rent charged for RTS participants:** $186,265 JP Enrolled in coaching: $23,778 JP Total: $98,475 CP: $85,578	Yes. Please note that CHA does not collect any rental revenue in the FSS+ voucher program and more accurately reflects the amount voucher holders pay to landlords in the private market. A difference of $2,122 between the site total and RTS total reflects TTP of the 3 households that are still enrolled in RTS but no longer live at either site.
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:** 0	Number of FSS+ participants that **experienced end in subsidy**: 8 Number of RTS participants that **experience end in subsidy**: 2	Yes. In FSS+, 16 participants graduated the program. 8 remain in the voucher program, 5 purchased a home, and 3 transitioned to market rental units. It is too early to connect an end of subsidy to self-sufficiency and the RTS program. The two RTS participants that left CHA housing include (1) One resident lived in the unit for less than one month and (2) one resident moved in with relatives.
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	70%	FSS+ Participants: 66 JP Enrolled in coaching: 92	Close but no for FSS+. In keeping with previous years, some participants have accounts in serious delinquency or in collection. Improvements in credit score may take longer, as they work to increase their incomes and negotiate payment plans for delinquent accounts.
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	45 points	FSS+ Participants: 44 JP Enrolled in coaching: 25	Close but no for FSS+. See description above.

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: 45	**Percent of FSS+ participants in the program for at least an entire year and had a decrease or zero collection debt:** 80 **Percent of JP Enrolled in coaching that had a decrease or zero collection debt:** 100	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: $33,000	All FSS+ participants: 192 All FSS+ participants: $38,000 FSS+ Participants that have been in the program for at least one year and experienced an increase in earnings:138 **FSS+ Participants that have been in the program for at least one year and experienced an increase in earnings:** $36,798 **RTS Participants:** $17,466 JP Enrolled in coaching: $17,079 JP Total: $13,666 CP: $19,344 Median earned income of RTS participants that have earned income: $30,561 JP Enrolled in coaching: $33,626 JP Total: $29,296 CP: $31,498	Yes.

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

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: 50%	**FSS+ Participants:** 100% **RTS Participants:** 47% Count of RTS Participant: 151 JP Enrolled in coaching and experienced an increase: 19 JP Total that experienced an increase: 75 CP that experienced an increase: 75	Yes
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**: 25	**FSS+ Participants that have been in the program for at least one year <u>and</u> experienced a reduction in subsidy**: 138 RTS Participants that experienced a reduction in subsidy: 138 JP Enrolled in coaching: 18 JP Total: 69 CP: 66	Yes. There are 3 households that moved out of their units at either Jefferson Park or Corcoran Park and are still enrolled in RTS. All three experienced a reduction in subsidy.

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

1,984 total units have been preserved as a result of this activity. In FY17, 358 units across three sites in Boston were preserved. One site consists of 181 units that elected to take enhanced vouchers for all the units. The following table includes the units preserved under this activity and have been updated based on information to-date.

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	3	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	127	145
Brookside Terrace	Southbridge	Family	FY15	133	150
Cleaves Court	Boston	Family	FY16	29	36

PROJECT	CITY	HOUSING TYPE	FY ISSUE OF HAP	UNITS UNDER HAP CONTRACT	UNITS PRESERVED
Chauncy House	Boston	Family	FY16	53	53
MassPike	Boston	Family	FY16	146	157
808 Memorial Drive	Cambridge	Family	FY16	76	76
Briston Arms	Cambridge	Family	FY16	32	50
Coes Pond	Worcester	Elderly/Disabled	FY16	207	207
Madison Park	Boston	Family	FY16	115	120
Landfall Apartments	Boston	Family	FY17	15	15
Quincy Tower	Boston	Elderly/Disabled	FY17	4	162
Concord Houses[1]	Boston	Family		0	181
TOTAL				**1,558**	**1,984**

1. All enhanced vouchers, no PBA HAP contract

CHANGES TO BENCHMARKS, BASELINE, METRICS

None.

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: 1,925 Units to be preserved before FY Start: 250 Units already preserved: 1,416 **Units Planned:** 250	Total Units: 1,984 Units already preserved: 1,626 **Units Preserved in FY:** 358	Yes.

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

IMPLEMENTATION YEAR

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

PREVIOUSLY APPROVED AUTHORIZATION

2009 MTW Agreement, Attachment C.D.2

DESCRIPTION

The Sponsor-Based Program is composed of three programs:

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

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

1. HARD TO HOUSE PROGRAM (HC.2008.03)

CHA partners with local service providers that work directly with the hard-to-house population including households and individuals with psychiatric, developmental and behavioral disabilities. CHA provides housing assistance only while the local service provider provides intensive support services and case management to the hard-to-house households served. CHA allocates a specific number of vouchers for this program and service providers may end up serving more than one household or individual per voucher for the year. The following table identifies partnerships and vouchers allocated in FY17:

	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.	2
2	Heading Home, Inc.	2009	Homeless families/individuals.	30
3	YWCA	2009	Participants of YWCA Dept of Mental Health (DMH) housing program, may include services from Vinfen.	15
4	Just A Start Corp.	2009	YouthBuild participants requiring emergency or transitional housing.	1
5	North Charles, Inc[1]	2008	Men in substance abuse recovery, housed in YMCA Central House; 5 SBVs committed.	5
6	Transition House	2009	Victims of domestic violence.	11
7	Specialized Housing, Inc.	2009	Adults with developmental disabilities.	1
8	Vinfen	2009	Adults with psychiatric disabilities served through Cambridge Supported Housing Program.	1
10	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

11	Y2Y	2016	Homeless/street involved youth, ages 14-24.	22
12	Somerville Homeless Coalition	2016	Homeless families/individuals.	2
13	YWCA - Bigelow Shelter	2016	Homeless families/individuals.	6
14	Casa Myrna Vazquez	2017	Survivors of the sex trade.	8
			TOTAL	**127**

1. The partnership agreement ended in November 2017.

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.

MTW FUNDS LEVERAGED IN PPH-TH PROGRAM

	2014	2017
MTW funds	$65,000	$142,500
Number of staff	1	4
Program operating cost[1]	$65,000	$415,000
Percent MTW Funds for staff	100%	34%
Funding resources	CHA	CHA City of Cambridge MA Office of Victims Assistance Tufts Health Plan Foundation
Households served (inclusive of CHA residents and Cambridge residents)	62	174

1. Operating cost does not include unit month cost.

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. A minimum of 30 and maximum of 45 MTW HCV subsidies have been allocated for the entire duration of this program (more than one year).

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
HARD TO HOUSE	
Heading Home, Inc.	Clients within the program are a tight-knit, united group and constantly provide each other with resources and emotional support. Several clients in the program are continuing to attend various support groups to maintain their sobriety. One of these clients reunited with her family after a long absence. A client obtained a Section 8 voucher and successfully transferred out of the CHA program into Charlestown Public Housing. The client worked very hard andwas only in the program for a year and a half and during that time, experienced many losses- the loss of a job, the loss of a friend and a family member, and experienced bouts of depression. Despite this, the client adhered to all of the program requirements while holding down a job and raising two sons. A client started an internship at Hallmark Health Medical Associates in Wakefield and is set to graduate next month with a Medical Assistant certificate. The client's ultimate goal is to make an income that will allow her family to move into market rent. The client took all of the necessary steps last year to receive full custody of her son; even though he's been in her care since birth. This client is in regular contact with her case manager regarding schedules and weekly/monthly goals. A client moved into a new unit that received an Up and Out from volunteers. Despite facing many trials last year, this client never lost hope. The client got her daughters into daycare, started working at Victoria's Secret as a stock clerk and made new friends at a local church. This client has been working diligently on obtaining housing. She is on numerous housing waitlists and always presents her housing logs to her case manager.
Just-A-Start Corp.	One participants was "couch surfing" with no fixed home. His attendance at YouthBuild (YB) was being negatively impacted by his housing instability and the chaotic situation with his family. Staff believed he would drop out of YB. Although he has continued to experience ups and downs (with a family member becoming incarcerated), his attendance increased once he could live in the unit through this program. He obtained his Pre-apprenticeship Certificate Training (PACT) credential. Other work towards obtaining his HiSet credential is in progress. He has also learned about being a responsible resident in an apartment building.
Home for Little Wanderers Roxbury Village	One individual graduated with a bachelor's degree. One individual enrolled in a bachelor's program full-time and living on campus. One individual finished a GED equivalent and has enrolled part-time at a community college. One individual obtained a full-time job at the VA in Dedham. Two individuals enrolled in a new program to pursue higher education. One individual is pursuing a GED through night classes and is on track to finish in June 2018.
Home for Little Wanderers Temple Street	Three residents completed the fall semester in college. One of the residents previously lived in an abandoned house; in fall 2017 she earned a 4.0 (GPA). One resident secured a full-time administrative job at a local hotel. She will be enrolling into college in the fall. One resident enrolled in a CPR/First Aid course and passed her certification which will help her in her career path as a ship captain. Twelve residents are working full-time. These jobs were secured with the help of the Life Coach. With assistance from her local Corporate Coach, one resident worked with a bank to develop a plan to reduce her debt. One resident is working with the Life Coach to develop a transition plan and moving into her own apartment within the year and work full time. One resident is working on a permanency initiative with the Program Director to locate and connect with her biological mother. One resident, with the help of the Program Director is re-connecting with her biological father after seventeen years of not having him in her life. One resident recently reconnected with her biological mother who lives nearby. They have begun cooking meals together. This resident is also teaching her mother how to cook!

Partner	Highlights
Y2Y	Check out the Y2Y Annual Report. https://www.y2yharvardsquare.org/wp-content/uploads/2017/12/Y2Y-2017-Annual-Report.pdf
Somerville Homeless Coalition	One client worked with the Massachusetts Coalition for the Homeless and gave testimony for MA House Bill 1129 (A Bill of Rights for People Experiencing Homelessness).
Casa Myrna Vazquez	Casa Myrna was able to open this new shelter program thanks in part to operating subsidies from CHA. Without the funding, there would be no specialized housing program for survivors of commercial sexual exploitation in the Boston/Cambridge area.
CASCAP	In February 2017 both clients transitioned off this program and were able to remain in the same unit. The units no longer receive CHA sponsor-based subsidies. One resident is fully employed and receives no public subsidies. The other became a tenant-based voucher holder and achieved permanent housing.
PATHWAYS TO PERMANENT HOUSING - PPH	
Transition House	The Pathways (PPH) program that is a collaboration with CHA continues to be a successful model. One household of a mother and 1 teenage daughter is an example. The mother entered the PPH program while under our supervision working in the educational field and then lost her job (cuts in the school). This would have put her at risk of homelessness if not for the support of the program and the CHA voucher. She was able to dedicate herself to job search and now works for a non-profit in administration. Another very disabled single individual was able to access housing in the PPH although she had a CORI. Her criminal history was linked to her domestic violence history but other landlords would have not housed her.
Heading Home	Three program participants successfully graduated the program and qualified for a CHA-funded housing voucher. No Plus One Payouts occurred because there were no eligible participants in the FY.

CHANGES TO BENCHMARKS, BASELINE, METRICS

None.

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

HC #5: Increase in Resident Mobility				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	0 households	Hard to House: 96 Transition House: 2 Heading Home: 20 **Total Households:** 118	Hard to House: 336 (127 vouchers) Transition House: 3 Heading Home: 24 (21 vouchers) **Total Households:** 363	Yes.
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: 96 Transition House: 2 Heading Home: 20 **Total Households:** 118	Hard to House: 336 (127 vouchers) Transition House: 3 Heading Home: 24 (21 vouchers) **Total Households:** 363	Yes
SS #5: Households Assisted by Services that Increase Self Sufficiency				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Number of households receiving services aimed to increase self sufficiency (increase).	0 households	Hard to House: 96 Transition House: : 2 Heading Home: 20 **Total Households:** 118	Hard to House: 336 (127 vouchers) Transition House: 3 Heading Home: 24 (21 vouchers) **Total Households:** 363	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 households	0 households	Hard to House: 5 (127 vouchers) Transition House: 0 Heading Home: 0 (21 vouchers) **Total Households:** 5	Yes. HUD is requiring the use of this metric and End of Subsidy (EOS) as the unit of measurement. EOS, while it might occur, is not a realistic or intended outcome; using this "finish line" to measure self-sufficiency is misleading and dilutes the positive impact that MTW authority has had in advancing self-sufficiency in other MTW and non-MTW activities.

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

CE #4: Increase in Resources Leveraged[2]				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Amount of funds leveraged in dollars (increase)	$0	$1,617,489	$3.3 million	Yes. HUD is requiring the use of this metric. Number includes Hard-toHouse population only.
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	1.9 households	2.6 households	Yes

1. Household count may exceed the voucher count depending on the program structure and client turnover. The North Charles partnership ended in November 2017 and CHA was unable to gather data directly from the organization after the contract expired. Therefore we carried over FY16 Report data for this partnership.

2. Resources leveraged does not account for an abbreviated program period such as in the case of Home for Little Wanderer-Temple Street (started August 2017), North Charles (ended November 2017), and Casa Myrna (started Winter 2017).

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

IMPLEMENTATION YEAR

Approved in FY01 MTW Plan and implemented in FY01.

PREVIOUSLY APPROVED AUTHORIZATION

2009 MTW Agreement, Attachment D.A.1

DESCRIPTION

This program allows CHA to preserve its Massachusetts Rental Voucher Program (MRVP) state rental assistance subsidies. As a stand-alone program, MRVP provides exceptionally low payment standards. CHA supplements these vouchers with MTW Block Grant funds so that the vouchers can be used in the Cambridge market. CHA originally allocated $21,600 for this program. The table below reflects the MRVP HAP and MTW funds spent in the last 4 years.

Fiscal Year	Households Served	MRVP HAP	MTW Funds	Monthly MRVP Average/HH	Monthly MTW Average/HH
FY14	8	$48,936	$44,607	$510	$464
FY15	8	$48,936	$50,340	$510	$524
FY16	8	$38,461	$50,896	$267	$530
FY17 (21 mths)	7	$57,838	$92,152	$393	$627

IMPACT

The average MRVP HAP increase between FY16 to FY17 reflect fluctuations that could occur in household income in any year. 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 BENCHMARKS, BASELINE, METRICS

The table below provides information for this MTW activity.

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	8 households Two CHA households left and a moratorium was instituted that did not allow any new vouchers to be issued.	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: $52,224 Total households served: 8 **MRVP subsidy amount:** $48,936	Amount of MTW funds spent: $92,152 Total households served: 7 **MRVP subsidy amount:** $57,838	Yes. The MRVP subsidy amount is over a 21-month transtion year. Average monthly amount is lower than the benchmark and indicates that households' incomes increased and led to lower average MRVP HAP payments. The MTW funds are monthly fixed amounts.

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. At the time of this writing, 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 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: 398 Anticipated in FY: 40 Anticipated in FY: 0 **Total Units**: 438	Units completed to date: 1,595 New units online : 0 **Total Units:** 1,595	Yes. The 1,595 units consist of: (1) 1,150 RAD Phase I units minus 44 JFK PH units and 53 Lincoln Way that were already included in the 398. (2) 104 units JP State(3) 40 units at Temple Place (4) 398 affiliate units

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
2017	2	0
2016	0	0
2015	1	5
2014	1	3

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 BENCHMARKS, BASELINE, METRICS

None.

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	4 households	2 households	No. This is an activity that provides households flexibility between housing programs and available on an as-needed basis. Therefore, we believe setting a benchmark is not relevant for this activity.

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

Approved in the FY09 MTW Plan and implemented in FY09. Modified in FY10 and FY14.

PREVIOUSLY APPROVED AUTHORIZATION

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

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.

receiving the maximum amount permissible under CHA's payment standard. This initiative is also used to assist disabled households. On a case-by-case basis, disabled households that find a unit in the private rental market may receive an even greater exception rent.

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

In October 2017, CHA set Cambridge payment standards at 125% of HUD's FY18 Fair Market Rents. This activity has become standard practice for all bedroom size units in Cambridge. Therefore, any new admission lease up in Cambridge would fall under this activity. CHA's challenge, like many housing authorities located in expensive housing markets, is balancing the maximum number of voucher households served with reasonable payment standards that would enable households to live in Cambridge.

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.

YEAR	Newly Issued Vouchers Leased in Cambridge (at initial lease up)	Total Newly Issued Vouchers	Percent Newly Issued Vouchers in Cambridge
FY17 (21 mths)	58	131	44%

IMPACT

This activity increases the ability for any new voucher holder to live in Cambridge and impacted 58 new voucher holders in FY17.

CHANGES TO BENCHMARKS, BASELINE, METRICS

This activity counts only voucher holders (new admissions) that physically moved into a unit in Cambridge, MA at initial lease up.

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: 37	**Households that leased units in Cambridge at over 120% FMR at initial move in:** 58	Yes. This metric is not an accurate measure of the effectiveness of this activity. The effectiveness is a function of new admissions leased at over 120% FMR relative to total new admissions that occurred during the FY.

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

IMPLEMENTATION YEAR

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

PREVIOUSLY APPROVED AUTHORIZATION

2009 MTW Agreement, Attachment C.D.7

DESCRIPTION

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

Sections of 24 CFR 983 Waived Through MTW Authority

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

This activity includes units preserved under (1) Expanding the Supply of Hard Units, (2) Units project-based under Expiring Use, and (3) new vouchers project-based (see Housing Choice Vouchers Project-Based section on **p 44**).

IMPACT

In FY17 40 new units were project-based and preserved.

CHANGES TO BENCHMARKS, BASELINE, METRICS

None.

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

HC #1: Additional Units of Housing Made Available				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household, give that type in this box.	0 units	Aggregate new units to date: 823 Anticipated new units: 0	Units project-based through expanding supply of hard units in FY: 0 Units project-based through Expiring Use in FY: 19 Units project-based through private nonprofit developers in FY: 21 (Port Landing - 8; Auburn Court III - 8; Elm St - 1; Otis St - 3; Churchill - 1) **Total New units in FY:** 40	Yes.
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	0 units	Units project-based through expanding supply of hard units in FY: 0 Units project-based through Expiring Use in FY: 19 Units project-based through private nonprofit developers in FY: 21 (Port Landing - 8; Auburn Court III - 8; Elm St - 1; Otis St - 3; Churchill - 1) **Total New units in FY:** 40	Yes.
CHA Metric: Percentage of PBAs Relative to Total MTW Vouchers				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
PBAs as percent of total MTW vouchers	26%	70%	52%	No. The calculation is based on total project based vouchers under contract (2,244) divided by total MTW vouchers (4,317 - inclusive of new expiring use vouchers).

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.

FY17 Voucher Holders Paying Over 40% Income Towards Rent

	Household Count	Elderly/ Disabled Count	Average Household Size	Average Tenant Rent to Owner	Income Range
New Admission in Cambridge	1	0	6	$1,651	$28,934
New Admission outside Cambridge	10	10	2	$719	$9,450 - $17,096
Participants at 2 years+ in Cambridge	9	5	2	$607	$3,644 - $33,012
Participants at 2 years+ outside Cambridge	3	0	1	$309	$6,454 - $9,765
Total	**23**	**15**			

The 10 new admission households outside of Cambridge all live in Boston in an elderly building in CHA's expiring use preservation program.

FY17 Zero Income - Paying Minimum Rent or Less at New Admission

	Household Count	Elderly/ Disabled Count	Average Household Size	Average Tenant Rent to Owner	Income Range
Zero Income at New Admission in Cambridge	2	0	1.5	$0	$0
Zero Income at New Admission outside Cambridge	22	0	1	$0	$0
$50 Minimum Rent or less at New Admission in Cambridge	2	0	2.5	$23.50	$7,200 - $11,232
$50 Minimum Rent or less at New Admission outside Cambridge	2	1	1.5	$17	$3,996 - $7,660
Total	**28**	**1**			

CHANGES TO 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	37 households	11 households at initial lease-up	No. This activity is available provide more choice for households that may not otherwise be able to live in opportunity neighborhoods, specifically Cambridge.

HC.2000.02 - IMPLEMENT VACANCY AND DAMAGE PAYMENTS/HCV

IMPLEMENTATION YEAR

Approved and implemented in FY00.

PREVIOUSLY APPROVED AUTHORIZATION

MTW Agreement, Attachment C.D.1.d

DESCRIPTION

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

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

1. Compensation in Cases of Vacancy Without Notice: In the event that a household vacates without notice, landlords may receive up to 80% of one month's contract rent if they do not require last month's rent at initial lease up.
2. Guaranteed Damage Compensation: Landlords who accept a reduced security deposit are guaranteed compensation for all damages in excess of the security deposit in the event that a household fails to pay.
3. Incentive to Rent to CHA Voucher Holders: Landlords (including those who require last month's rent at initial lease) with units occupied by a CHA voucher holder may be compensated up to 80% of contract rent to cover vacancy of those units, provided the new tenant is a CHA voucher holder.

IMPACT

The following provides (1) a breakdown of vacancy 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. Both calendar years 2016 and 2017 are included since both are included in adjusted FY17. A total of $48,093 vacancy payments were made to 20 distinct owners in 2016. A total of $123,375 vacancy payments were made to 18 distinct owners in 2017. The number of vacancy payments for SRO-type units were similar in 2016 and 2017 at $700-$800. However, the number of vacancy payments made for non-SRO units were greater in 2017 because we increased our tenant based voucher utilization and added project-based preservation units which meant that there were more units from which owners could request vacancy payments, particularly for new preservation units.

2016 Vacancy Payments

Total Distinct Owners: 20

Total Distinct Units: 49

Total Vacancy Payments: $48,093

	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	10	$23,282	27	$862	0	$0	0	$0
Project-based vouchers	12	$23,783	21	$1,133	1	$1,028	1	$1,028
Total	22	$47,065	48		1	$1,028	1	

2016 Owners[1]

Total Distinct Owners: 1,225

	In Cambridge	Outside Cambridge
Tenant-Based	279	836
Project-Based	35	15
Inclusionary	33	0
State	46	23

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

2017 Vacancy Payments

Total Distinct Owners: 18

Total Distinct Units: 92

Total Vacancy Payments: $123,375

	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	7	$57,409	44	$1,305	1	$960	1	$960
Project-based vouchers	14	$62,642	74	$847	1	$2,364	2	$1,182
Total	21	$120,051	118		2	$3,324	3	

2017 Owners[1]

Total Distinct Owners: 1,273

	In Cambridge	Outside Cambridge
Tenant-Based	275	884
Project-Based	37	16
Inclusionary	35	0
State	43	26

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

CHANGES TO 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	37	128	Yes. The number reflects total units in calendar years 2016 and 2017. There may be distinct units in January 2016 - March 2016 (outside this adjusted FY17) included in the outcome.

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

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

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

IMPLEMENTATION YEAR

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

DESCRIPTION

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

Regular and Interim Recertification	Elderly and disabled households undergo biennial recertifications. Elderly and disabled households may request as many interim recertifications as needed. Non-elderly, non-disabled households undergo recertification on an annual basis. Voluntary interim recertification may be requested once between annual recertifications. In FY14, CHA implemented a $60 fee to participants that do not attend a scheduled reexamination appointment without giving 48 hours prior notice. This measure was adopted to increase participant accountability and timely completion of recertifications. In calendar year 2017, biennial recertifications under HC.2008.08 - IMPLEMENT RECERTIFICATIONS EVERY TWO YEARS FOR HOUSEHOLDS IN HCV was submitted in the FY18 MTW Annual Plan. The initiative was originally intended for project-based voucher holders but extended to all voucher holders. The extension of the biennial recertifications to all voucher holders was not implemented 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 5 fiscal years. CHA began reporting aggregate earned income in FY13.

AGGREGATE EARNED INCOME OF HCV HOUSEHOLDS		
Year	Aggregate Earned Income	Difference (+/-)
FY13	$22,259,348	
FY14	$22,624,322	+$364,974
FY15	$22,786,661	+$162,339
FY16	$38,650,549*	+$15,863,888
2017	$47,205,015	+$8,554,446

*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 that include both members who are citizens/eligible immigrants as well as members who do not contend to have eligible immigration status are charged 110% of the rent they would pay if the household were not a mixed family.

FY17[1] COUNT OF MINIMUM AND MIXED RENT HCV HOUSEHOLDS

HCV Participants	Mixed Rent	$0 Rent	Between $0 and $50 Rent	At $50 Minimum
In Cambridge	66	168	29	22
Outside Cambridge	45	129	28	17
Total	**111**	**54**	**57**	**39**

1. The count of households covers a 21 month fiscal year.

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 relative to the previous year because of the additional 9 months included in FY17 as well as the number of interims resulting from rent increases and the increase in tenant-based voucher utilization.

CHANGES TO BENCHMARKS, BASELINE, METRICS

None.

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 performed: 1,380 + 535 expiring use units Interims Performed: 627 Recertification Time: 1.25 hours Interim Time: .75 hours Hourly cost of recertification specialist: $41.02 **Total cost:** $90,508	Recertifications performed: 4,132 Interims Performed in FY16: 2,867 Recertification Time: 1.25 hours Interim Time: .75 hours Hourly cost of recertification specialist: $41.02 **Total cost:** $300,348	No. The benchmark was not achieved because the number of recertifications and interims carried out during the 21 month adjusted fiscal year is significantly higher than in FY16 and at the time the benchmarks were set, we did not yet know that the FY would be adjusted. In addition 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	2,200 hours	Recerts performed: 4,132 Interims Performed: 2,876 Annual Recertification Time: 1.25 hours Interim Time: .75 hours **Total Time:** 7,322 hours	No. Factoring the number of recerts and interims that occurred, it is not realistic to see an aggregate decrease in staff hours.

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

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%	21%	24% based on a quality control audit performed in October 2017.	No. The rate is similar to the benchmark set and the department experienced staff turnover that may account for some errors.
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	$9,855,757	$33,380,641	Yes. The increase in rent that voucher holders paid to landlords/private property owners is a result of the increase in number of expiring use units combined with an extended 21 month fiscal year.
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	$23,592	$26,715	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	$21,592	$23,767	Yes. This number represents the median earned income of households that have earned income.

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

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

INCREASING HOUSING CHOICE:

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

REDUCE COST AND ACHIEVE GREATER COST EFFECTIVENESS IN FEDERAL EXPENDITURES

CE.2006.01 Rent Simplification Program

CE.2009.01 Implement Ceiling Rents

CE.2009.01 - IMPLEMENT CEILING RENTS/PUBLIC HOUSING

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

DESCRIPTION

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

IMPACT

CHA did not institute any changes to the ceiling rent. In the adjusted FY17, 150 public housing residents and 97 RAD residents maintained ceiling rent income for at least one month.

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

CHANGES TO 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: $66 **Total cost of task:** $0	Hourly cost of staff that sets annual ceiling rent: $66 **Total cost of task:** $0	Yes. HUD is requiring the use of this metric. CHA maintains that this is an estimate and not an actual measure of time saved; therefore, staff time should not be applied as a metric. CHA does not support the use of this metric and cautions that it is only an estimate.
CE #2: Staff Time Savings				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Total time to complete the task in staff hours (decrease)	24 hours	0 hours	0 hours	Yes. HUD is requiring the use of this metric. CHA does not support the use of this metric and cautions that it is an estimate; we do not have the data to support the claimed decrease in staff hours.
CE #5: Increase in Agency Rental Revenue				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Rental revenue in dollars (increase)	Ceiling rent revenue collected in FY14: $1,926,858	Ceiling rent revenue to be collected in FY: $2,209,671	Ceiling Rent Revenue collected for Public Housing: $2,138,774 Ceiling Rent Revenue collected for RAD in FY16: $1,618,990 **Total**: $3,757,764	Yes. Additional rental revenue from ceiling rent was collected. However, this was not an intended outcome of this activity. HUD is requiring the use of this metric even though it is not an intended outcome of this activity. This activity seeks to simplify any adjustments to the ceiling rent and ease the administrative burden. It is not meant to be a tool to increase revenue. Increases occur as a necessary measure to so as not be exceedingly under market rents.

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

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

IMPLEMENTATION YEAR

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

DESCRIPTION

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

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

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

AGGREGATE EARNED INCOME OF PUBLIC HOUSING/RAD/FORMER PUBLIC HOUSING HOUSEHOLDS		
Year	**Aggregate Earned Income**	**Difference (+/-)**
FY13	$24,632,853	
FY14	$25,384,099	+$751,246
FY15	$28,028,884*	+$2,644,785
FY16	$29,976,506*+	+$1,947,622
FY17	$33,676,381+	+$3,699,875

* 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.

Mixed Family Rent

Mixed families that include both members who are citizens/eligible immigrants as well as members who do not contend to have eligible immigration status are charged 110% of the rent they would pay if the household were not a mixed family.

Households with Real Property and Significant Assets

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

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

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

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

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

IMPACT

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

HARDSHIP APPLICATIONS

Application Year (by Fiscal Year)	Applications Received	Public Housing	HCV	Hardship Granted	Hardships Not Granted
2007	3	3	0	1	3
2008	1	1	0	0	1
2009	7	6	1	2	5
2010	10	10	0	8	2
2011	2	2	0	2	0
2012	1	0	1	0	1
2013	4	0	4	4	0
2014	2	1	1	1	1
2015	5	3	2	4	1
2016	0	0	0	0	0
2017	4	1	3	3	1
Total	**39**	**27**	**12**	**25**	**15**

FY17[1] HOUSEHOLDS TRANSITIONED TO HOMEOWNERSHIP OR MARKET RENT[2]

Program	Homeownership	Market rent	Total
Public Housing	8	11	19
RAD	7	3	10
Former Public Housing	0	3	3
Total	**15**	**17**	**32**

1. The count of households covers a 21-month fiscal year.
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.

FY17[1] COUNT OF MINIMUM AND MIXED RENT HOUSEHOLDS

Program	Mixed Rent	Zero Rent	$50 Minimum	Next Tier Minimum	Next Tier Adjusted Income Range
Public Housing	21	42	66	47	$2,580 - $4,998
RAD	20	10	79	23	$0[2] - $4,920
Former Public Housing	1	2	12	20	$2,600 - $4,940
Total	**42**	**54**	**157**	**90**	

1. The count of households covers a 21-month fiscal year.
2. 2 HHs with adjusted income at $0. They have been in CHA housing since 2010 and 2012. Next highest incomes are $1,800 and $2,628.

CHANGES TO BENCHMARKS, BASELINE, METRICS

Recertification and interim time was increased because tax credit recertifications are now part of the recertification.

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	Recertifications: 1,173 Interims: 508 Recertification time: 1 hour Interim Time: .5 hours Staff Cost/hr: $41.02 **Total Cost of Task**: $87,803	Total Recertifications: 1,942 Public Housing: 936 RAD: 792 Former Public Housing: 214 Total Interims: 1,191 Public Housing: 775 RAD: 408 Former Public Housing: 8 Recertification time: 1.25 hours Interim Time: .75 hours Staff Cost/hr: $41.02 **Total Cost of Task**: $136,217 Public Housing: $71,836 RAD: $53,161 Former Public Housing:$11,219	No. Many factors affected FY17 outcomes. First, all public housing/RAD/former public housing households were scheduled for recertifications in calendar year 2017. In addition, all RAD households need to complete a tax recertification every year. As a result of the RAD conversion, the recertification process has become more time intensive with annual tax recertifications now folded into continued occupancy. In this regard, this metric is not meaningful because the baseline activity was less intensive than the current recertification process.
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	2,141 hours	Total Recertifications: 1,942 Public Housing: 936 RAD: 792 Former Public Housing: 214 Total Interims: 1,191 Public Housing: 775 RAD: 408 Former Public Housing: 8 Recertification time: 1.25 hours Interim Time: .75 hours **Total Hours of Task**: 3,321 Public Housing: 1,751 RAD: 1,296 Former Public Housing: 274	No. See Benchmark Achieved section in CE1 above.

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%	5%	Rent determination errors from a quality control audit in January 2016: 15%	No. HUD is requiring the use of this metric. A quality control audit has not been carried out since the January 2016 audit reported in the FY16 Report. The audit was published in April 12, 2016. This number is below the error rate discussed in HUD's *Quality Control for Rental Assistance Subsidies Determinations for FY 2012* Report. The report states that nationally twenty-five (25%) of households living in housing authority-administer public housing had errors in their income and rent calcuations.
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	$11,491,914	Public Housing: $7,200,101 RAD: $5,726,824 Former Public Housing: 1,177,629 **Total rental revenue collected:** $14,044,554	Yes. Note that the outcome reflects rent collection over 21 months compared to previous fiscal years.
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: 2,315 Total households with earned income:1,110	Total households: 2,155 Public Housing: 926 RAD: 947 Former Public Housing: 282 **Total Households employed full or part-time:** 917 Public Housing employed: 427 RAD employed: 450 Former Public Housing employed: 40	No. HUD is requiring the use of this metric. CHA maintains that while household income increases are likely connected to employment and that Rent Simplification allows households to save any additional income increases experienced between biennial recertifications, employment is not required under this activity. Therefore tracking employment is misleading as a measure of Rent Simplification.
	Percentage of Public Housing households that experienced Full-or Part-Time employment status on March 31, 2014: 40%	48%	**Percentage of households that experienced full or part-time employment**: 43% Percentage Public Housing employed: 46% Percentage RAD employed: 48% Percentage Former Public Housing employed: 14%	No. See Benchmark Achieved explanation above.

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	130	**Total Households receiving TANF: 62** Public Housing: 27 RAD: 29 Former Public Housing: 6	Yes. HUD is requiring the use of this metric. CHA maintains that while leaving TANF is encouraged by Rent Simplification, it is misleading to track the metric using a Baseline and Benchmark approach, especially since exiting TANF is not a required outcome.
SS #8: Households Transitioned to Self Sufficiency/PH/RAD				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Number of households transitioned to self sufficiency (increase)	Households that left CHA public housing as a result of renting or purchasing a home in the private market in FY 13: 46	22	**Total: 32** Public Housing:19 RAD: 10 FPH: 3	Yes. HUD is requiring the use of this metric and End of Subsidy (EOS) as the unit of measurement. CHA maintains that it is misleading to track this metric as part of this activity because it is not a required or intended outcome.
CHA Metric: Average Household Income/PH/RAD				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Average Earned Income of households affected by this policy in dollars	$26,810	$31,430	**Total Average Earned Income:** $36,725 Public Housing: $37,850 RAD: $37,505 Former Public Housing: $15,926	Yes. The numbers are based on households that have earned income.
CHA Metric: Median Household Income/PH/RAD				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Median earned income of household affected by this policy in dollars.	$24,440	$25,440	**Total Median:** $28,520 Public Housing: $30,098 RAD: $29,199 Former Public Housing: $12,152	Yes The numbers are based on households that have earned income.

NOT YET IMPLEMENTED ACTIVITIES

EM.2014.02 - TRANSITION TO MARKET RENT/PUBLIC HOUSING

DESCRIPTION

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

This initiative was approved in the FY14 Annual Plan.

UPDATE

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

TIMELINE

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

HC.2008.08 - IMPLEMENT RECERTIFICATIONS EVERY TWO YEARS FOR HOUSEHOLDS IN PROJECT BASED UNITS/HCV

DESCRIPTION

Similar to the biennial recertification policy in Public Housing, a biennial recertification schedule would apply to households living in Project-Based units. This initiative would 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, ease 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 would not apply to elderly or disabled households.

UPDATE

Currently, elderly and disabled households in CHA's MTW HCV program are on a biennial recertification schedule. CHA is proposing to convert all MTW voucher households to a biennial recertification schedule. In addition to elderly or disabled households, the limit on voluntary interim recertifications would not apply to households in the FSS+ program. CHA completed an impact analysis to determine the impact of this activity on tenant rent and HAP. Note that the original activity title stated only project-based households and that has been removed so that the activity applies to all MTW HCV households in the same manner that it applies to all MTW public housing/RAD/FPLI residents at CHA.

TIMELINE

This initiative was approved in the FY08 Annual Plan. CHA anticipates implementing this activity in the latter part of FY18.

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

DESCRIPTION

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

This initiative was approved in the FY08 Annual Plan.

UPDATE

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

TIMELINE FOR IMPLEMENTATION

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

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

DESCRIPTION

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

This initiative was approved in the FY08 Annual Plan.

UPDATE

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

TIMELINE FOR IMPLEMENTATION

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

ACTIVITIES ON HOLD - NONE AT THIS TIME.

ACTIVITIES CLOSED OUT

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

REASON FOR CLOSING OUT INITIATIVE

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

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

FINAL OUTCOME AND LESSONS LEARNED

Not applicable.

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

REASON FOR CLOSING OUT INITIATIVE

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

FINAL OUTCOME AND LESSONS LEARNED

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

HC. 2007.01 - REVIEW OF ALTERNATIVE SUBSIDY APPROACHES

REASON FOR CLOSING OUT INITIATIVE

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

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

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

FINAL OUTCOME AND LESSONS LEARNED

Not applicable.

PD.2000.01 - REQUEST FOR REGULATORY RELIEF FOR MIXED FINANCE

REASON FOR CLOSING OUT INITIATIVE

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

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

FINAL OUTCOME AND LESSONS LEARNED

Not applicable.

PD.2008.01 - LIBERATING ASSETS

REASON FOR CLOSING OUT INITIATIVE

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

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

FINAL OUTCOME AND LESSONS LEARNED

Not applicable.

PH.2013.02 - PROJECT-BASED VOUCHER IN PUBLIC HOUSING

REASON FOR CLOSING OUT INITIATIVE

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

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

FINAL OUTCOME AND LESSONS LEARNED

Not applicable.

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

REASON FOR CLOSING OUT INITIATIVE

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

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

FINAL OUTCOME AND LESSONS LEARNED

Not applicable.

SS.2011.01 - CAREER FAMILY OPPORTUNITY PROGRAM (CFO)

REASON FOR CLOSING OUT INITIATIVE

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

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

SUMMARY TABLE OF OUTCOMES

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

FINAL OUTCOME AND LESSONS LEARNED

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

CE.2008.05 - IMPLEMENT NEW INSPECTION PROTOCOL/HCV

YEAR CLOSED OUT: FY15

REASON FOR CLOSING OUT INITIATIVE

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

SUMMARY TABLE OF OUTCOMES

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

FINAL OUTCOME AND LESSONS LEARNED

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

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

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

YEAR PARTIALLY CLOSED OUT: FY16

REASON FOR CLOSING OUT THIS PORTION OF THE INITIATIVE:

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

ACTUAL SOURCES AND USES OF MTW FUNDING

Actual Sources and Uses of MTW Funding for the Fiscal Year

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

Describe the Activities that Used Only MTW Single Fund Flexibility

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

TRANSFERS TO PROGRAM AND ACTIVITIES USING THE BLOCK GRANT

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

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

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

WORKING CAPITAL

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

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

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

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

CAPITAL PROJECTS - GUARANTEES AND TRANSFERS

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

Local Asset Management Plan

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

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

Has the PHA provided a LAMP in the appendix?	Yes

CERTIFICATION: MTW REPORTING COMPLIANCE

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

2. 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 **pps 32, and 51-52.** CHA certifies the following: -

3. 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.

ADMINISTRATIVE

LOCAL ASSET MANAGEMENT PLAN

AS SUBMITTED IN THE FY17 PLAN

CHA is in compliance with the asset management/operating fund rule requirements set by HUD. The agency has established a fee-for-service and shared resources structure for most activities, as well as a Central Office Cost Center (COCC). 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.

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BOARD APPROVAL

EXTRACT OF THE MINUTES OF THE REGULAR MEETING OF THE BOARD OF COMMISSIONERS OF THE CAMBRIDGE HOUSING AUTHORITY WEDNESDAY, MARCH 28, 2018 5:30 P.M.

MEMBERS PRESENT:	GERARD J. CLARK, CHAIRPERSON NAOMIE STEPHEN, VICE-CHAIRPERSON SUSAN T. CONNELLY, TREASURER VICTORIA BERGLAND, ASSISTANT TREASURER ANTHONY PINI, MEMBER
ALSO PRESENT:	MICHAEL JOHNSTON, EXECUTIVE DIRECTOR BRENDA DOWNING, EXECUTIVE DEPARTMENT SUSAN C. COHEN, GENERAL COUNSEL SHIRLEY SANFORD, RECORDING SECRETARY

4. SUBMISSION OF THE FY17 MTW ANNUAL REPORT

MOTION: Mr. Pini moved the following motions:

a. Approval of the Moving To Work Deregulation Demonstration Program FY17 Annual Report.
b. Authorization of any technical corrections and changes to the document including any information that would be helpful to address public comments received on the draft Report.
c. Authorization to submit the final Report to U.S. Department of Housing and Urban Development

pursuant to the memorandum from Martha Tai to Michael Johnston, Executive Director dated March 23, 2018. Ms. Bergland seconded the motion, which upon being put to vote, was passed unanimously.

Michael Johnston, Secretary

Attest:
Seal

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ATTACHMENT 1 - HIGHER EARNER HOUSEHOLDS FACT SHEET

CHA CAMBRIDGE HOUSING AUTHORITY
POLICY + TECHNOLOGY LAB

UNDERSTANDING HIGHER EARNERS' HOUSING NEEDS

PURPOSE OF THIS PROJECT

This project studied the housing needs and preferences of higher-earning households (incomes exceeding 120% of the area median income [AMI]) living in CHA housing to identify ways in which CHA can help households increase their economic mobility.

HOUSEHOLD AND FAMILY STATS

31 Total households (82 individuals with earnings)

- 7 underhoused • 9 overhoused
- Average length of stay in unit (as of August 2017): 9 years, 4.5 months (Median: 6 years, 10 months)
- Average household size: 3.8
- Average age of head of household: 57
- Average age of wage earner: 42.9 (standard deviation: 14.92 - wide spread)
- Percent multigenerational household: 100%
- Percent identifying as immigrant households: 72%

WORK AND INCOME STATS

- Wage-earners with multiple sources of income: 9
- Range HH Earned Income: $84,444 - $218,416
- Average HH Earned Income: $138,793 (Median: $136,667)
- Average individual income (per job): $46,297 (Median: $44,616)
- Total jobs: 91 • Jobs per wage-earner: 1.12
- Households with children under 18: 8
- Adults in school: 11
  - Working students: 6

INTERVIEWS

38 households (76 individuals)

23 in-person interviews
2 phone interviews
1 mailed survey

FINDINGS

HOUSEHOLDS ARE NUCLEAR

All households in this population are nuclear families. Some also include extended family members.

GENERATIONS MATTER

Older generations, regardless of income, are interested in aging in CHA housing. Overall, younger generations are interested in transitioning into homeownership.

INCOME AND STATUS ARE TELLING

Full-time workers are most likely to think about homeownership seriously. Students and part-time workers are less likely to think about homeownership.

VOLATILITY IN HOUSEHOLD COMPOSITION + INCOME

Individuals moved in and out of households with some frequency during the two-month project. There were 7 household composition changes, and 2 household income changes among 31 households.

HOMEOWNERSHIP ISN'T JUST A DREAM

21/26 interviewees are thinking or have thought about purchasing a home. 14/21 are still considering homeownership. 12/26 not interested were once interested, but are no longer due to age. 10/12 not interested in homeownership are elderly or students.

RECOMMENDED NEXT STEPS

CONTINUE HIGHER-EARNER FELLOWSHIP THROUGH THREE TRACKS

- Establish connections between additional CHA households and access to City of Cambridge housing programs
- Identify resources and potential partners
- Conduct focus groups with residents to identify specific homeownership components that would be most helpful for CHA households

TAILOR HOMEOWNERSHIP TO CHA RESIDENTS THROUGH HOMEOWNERSHIP COURSES

- Make considerations for course design and CHA resident administrative needs

POLICY CONSIDERATIONS TO ADDRESS TWO DISTINCT POPULATIONS

AGING IN PLACE
Allow elderly individuals to retire in CHA housing.

ECONOMIC MOBILITY THROUGH WEALTH CREATION
Financially empower working individuals through homeownership programs.

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ATTACHMENT 2 - RESIDENT SATISFACTION SURVEY SUMMARY

CHA Cambridge Housing Authority
362 Green Street, Cambridge, MA 02139 | P: 617.864.3020 F: 617.868.5372 | www.cambridge-housing.org

Executive Summary

CHA conducted a resident survey from March through July of 2017. The survey was designed to provide CHA with detailed input on residents' concerns and priorities. CHA surveyed residents on key areas including, but not limited to, satisfaction with management, maintenance and resident services. The survey also provided residents with an opportunity to provide other types of comments and feedback. CHA contracted with an independent consulting firm to conduct the survey.

Survey Methodology

The methodology outlined below was used to conduct the 2017 Cambridge Housing Authority Resident Survey.

- A focus group meeting was held to solicit input from CHA housing residents regarding the survey instrument and administration process. The focus group meeting included a presentation about the survey process and an opportunity for residents to answer the survey questions and provide opinions/input.
- CHA developed draft and final versions of the survey. Areas of inquiry included:
    - Satisfaction with unit;
    - Satisfaction with maintenance or repairs;
    - Experience with the Property Manager and CHA Central Office;
    - Educational attainment;
    - Knowledge of CHA policies and programs; and,
    - Household financial health and concerns.
- Survey questions regarding finances were developed in cooperation with a doctoral student at Kennedy School of Government at Harvard University.
- The survey was prepared in English, Spanish, Portuguese, Haitian Creole, and Amharic.
- Prior to launching the survey, a memo was sent to CHA Housing Managers informing them of the survey process.
- A notice was sent to residents informing them of the survey process. The notice included Spanish, Portuguese, Haitian Creole and Amharic translation.
- A postcard was mailed to residents to remind them to complete the survey and informational posters were displayed at CHA's housing sites. CHA conducted outreach to local organizations regarding the survey process.
- Residents were given the option of completing the survey online or via paper copy. Independent surveyors administered the survey over the phone to residents who were unable to complete the survey online or via paper copy and who contacted the independent consulting firm via telephone.
- To ensure confidentiality, residents were given a password to use in completing the survey.
- There was a limit of one completed survey per household.
- Residents that completed the survey were eligible to win a prize. A total of six (6) cash prizes were awarded. Five (5) prizes of $50 each were awarded to households that completed the survey. A $25 cash prize was

awarded among households that responded to the survey during the door-to-door effort. All were selected through randomized drawings.

- In addition to online survey administration, in an effort to increase survey participation at elderly sites, on-site survey administration was conducted during coffee hours held at LBJ Apartments, Manning Apartments, and Miller's River. Residents were notified in advance that on-site survey administration would be conducted.
- To increase response rates at family sites, a door-to-door effort took place at Corcoran Park, Jefferson Park, Jackson Garden and Lincoln Way. Residents were notified in advance that door-to-door surveys would be conducted.

Survey Participation

A total of 462 residents, representing 19% of CHA's occupied units at the time, completed the survey. The table below provides data on the number and percentage of surveys completed for each CHA Team.

2017 Surveys Completed by CHA Team

Team	Number of Occupied Units	# of Completed Surveys	Survey Completion %
Aggregate	2,441	462	19%
116 Norfolk Street	52	6	12%
Affiliates	176	11	6%
Burns	279	55	20%
Corcoran Park	154	57	37%
Jefferson Park	272	92	34%
John F. Kennedy	43	8	19%
LBJ	186	38	20%
Manning	165	50	30%
Millers River	252	48	19%
Newtowne Court	378	33	9%
Putnam Gardens	185	26	14%

Team	Number of Occupied Units	# of Completed Surveys	Survey Completion %
Roosevelt Towers	208	25	12%
Truman	91	13	14%

Survey Results

Highlights of the aggregate survey results are outlined below.

Demographics

- Primary Language: The primary language spoken in the home is a language other than English for 30% of respondents. The primary languages other than English that are spoken most frequently are Haitian Creole (10%) and Spanish (6%). 27% of respondents indicated that there is a language barrier that prevents them from interacting with neighbors.
- Level of Education: 14% of respondents indicated that they have less than a high school diploma; 52% have a high school diploma, GED or some level of post high-school education absent a college degree; and 34% have a 2-year or 4-year college degree or post graduate degree.

CHA Policies

- 29% of respondents indicated that they are unaware of CHA's reasonable accommodation policy and 45% indicated that they are unaware of CHA's hardship policy.

Satisfaction Rates

- Quality of Current Unit: 75% of respondents indicated that they are either very satisfied or somewhat satisfied with the quality of their current unit.
- Experience Requesting Maintenance or Repairs:
  - 83% of respondents indicated that they are either very satisfied or somewhat satisfied with the way they were treated by the person doing the repairs; and,
  - 87% of respondents indicated that they are either very satisfied or somewhat satisfied with the process of requesting repairs, the quality of the repair work, and the amount of time it took to complete the repairs.
- Experience with Property Manager:
  - 85% of respondents indicated that they are either very satisfied or somewhat satisfied with how accommodating the staff was in proving the requested information and the way they were treated by the office staff;
  - 80% of respondents indicated that they are either very satisfied or somewhat satisfied with how easy it was to meet with the manager;
  - 79% of respondents indicated that they are either very satisfied or somewhat satisfied with the service provided by the Property Manager;

- 78% of respondents indicated that they are either very satisfied or somewhat satisfied with the Property Manager's communication skills; and,
- 76% of respondents indicated that they are either very satisfied or somewhat satisfied with how responsive management was to safety issues.

- Communication with CHA's Central Office: Eighty percent (80%) of respondents who contacted the CHA Central Office during the past year indicated that it took 5 work days or less for someone to get back to them, including 32% who indicated that someone got back to them the same day and 22% who indicated that someone got back to them the next day. Twenty percent (20%) of respondents who contacted the CHA General Office during the past year indicated that it took more than 5 work days for someone to get back to them, including 11 respondents (10%) that indicated that they never heard back from the Central Office.

Safety and Concerns

- In the Unit: 93% of respondents indicated that they feel very safe or safe in their unit.
- In the Building Hallway and Lobby: 78% of respondents indicated that they feel very safe or safe in the hallway and lobby of their building; however, 12% indicated that they feel unsafe or very unsafe.
- On the Outside Grounds of the Development: 83% of respondents indicated that they feel very safe or safe on the outside grounds of their development; however, 14% indicated that they feel unsafe or very unsafe.
- Areas of Concern: Of those respondents who identified an area of concern, the most common concerns are rodents and/or insects (53%), strangers lingering on the grounds (41%), and noise issues (37%).

Services

- After-School Programming: 56% of respondents would like to see more academic programming, 47% would like to see more athletic programming and 39% would like to see more art programming.
- Programs for Children, Teen and Adults: 38% of respondents indicated that they are unaware that CHA offers programs for children, teens and adults, such as The Work Force and This Way Ahead.
- Service Coordinators: 29% of elderly/disabled respondents are unaware that there are Service Coordinators available to help residents gain access to available resources such as medical and social services and 39% have not met with their Service Coordinator during the past year. Of those respondents receiving services or information from a Service Coordinator, 90% indicated that they were very satisfied or somewhat satisfied with the services or information they received during the past year from their Service Coordinator.
- CHA Website: 88% of respondents do not use the CHA website and 46% indicated that they would use a secure CHA website to log in and check their CHA account.
- Building Wi-Fi: 56% of respondents who live in buildings without free Wi-Fi indicated that they would use free Wi-Fi if it were made available.

Financial Considerations

- Internet Cost: The cost of monthly internet cost is over $15 for 89% of respondents who pay for internet in their home.
- 46% of respondents indicated that the statement "I am just getting by financially" describes their situation completely or very well, while 42% of respondents indicated that the statement "I am concerned that the money I have or will save won't last" describes their situation completely or very well.
- 54% of respondents indicated that they rarely or never have money left over at the end of the month while 42% indicated that their finances always or often control their life.

- Savings: 78% of respondents indicated that they have not added to their savings in the past year. Household bills (33%), paying off debt (19%) and medical bills (15%) were the most frequently identified reasons that have made saving difficult.
- Financial Goals: The most frequently identified financial goals were having savings for emergency use (40%) and no debt-pay off all loans (30%).

Recommendations

Based on the survey results, CHA has identified and will take the following actions as part of our commitment to improve level of service to our residents.

Communication

1. PROVIDE BETTER INTERNET ACCESS. We recognize the need to have internet access does not necessarily translate into being able to afford internet access. Survey results indicate that only 11% of respondents pay for the affordable $15/month internet option available to Cambridge residents. We are also aware that there are eligibility restrictions for this option and that the service itself is slow. Even so, providing a $15/month slow internet service to every household would be cost-prohibitive at an added cost of $500,000 per year to our operating costs. We believe a reasonable approach is to establish at least 2 computer workspaces with good internet speed and printer access for resident use at our housing sites.

2. IMPROVE WEBSITE FUNCTIONALITY. Our website is underutilized by residents. The website can be a valuable communication tool that allows residents to communicate with CHA and access critical information. CHA has prioritized diversifying information on our website to better engage residents.

3. IMPROVE NEWSLETTERS AND INCREASE EMAIL NOTIFICATIONS. CHA will make a concerted effort to gather email addresses from residents and prepare email notifications and news to residents. CHA will continue to produce newsletters and look for ways to improve newsletter content to better engage and meet the needs of residents.

Maintenance and Management

1. ALL WORK ORDERS WILL BE ADDRESSED BY NEXT BUSINESS DAY. To improve the responsiveness of CHA's Central Office to resident calls, CHA will invest in ensuring that each site team responds to work order requests within 24 hours of the next business day. Understanding that the scope of some orders may take more time than others and that each order will be prioritized accordingly, residents should expect a CHA staff person to confirm that their work orders have been submitted within 24 hours.

2. IMMEDIATE CONFIRMATION OF WORK COMPLETED. We are working to build a work order system that provides immediate confirmation when work is completed to the affected household. We recognize that communication between staff and residents has been inconsistent across sites and implementing an additional step, such as immediate paper confirmation of work, can alleviate both residents' concerns and the administration of work orders.

3. ROTATION OF PEST MANAGEMENT ACROSS ALL SITES. To ensure that all sites receive equal treatment in pest management, CHA will implement a rotation schedule of pest management services across all sites. Additional treatments may be requested.

4. LOCATE TRASH RECEPTACLES AWAY FROM BUILDINGS. Another source of increased rodents is the presence of trash. As part of the RAD conversion and Section 18 Disposition process, CHA is moving trash compactors and trash processing in spaces outside and away from the main building. Although this does not remove the presence of rodents, it is a positive step towards better managing rodents. CHA will implement additional rodent management measures where and when possible.

5. IMPROVED MAINTENANCE OF COMMON SPACE. CHA will invest in ensuring that site teams improve the maintenance of common space. Staff will be trained, as necessary.

Services

1. SERVICE FAIRS WILL BE HELD AT EACH ELDERLY SITE. CHA will work with service coordinators and local partners to hold an annual service fair at every elderly site to increase awareness of services available to our elderly and disabled residents.

2. IMPROVE ENGAGEMENT WITH CAMBRIDGE POLICE. CHA's safety and security administrator, upon request, will assist residents in initiating meetings with Neighborhood Sergeants so that residents can speak directly with officers based in their neighborhood. Cambridge Police maintains community policing program that includes Sector Lieutenants and Neighborhood Sergeants teams that cover neighborhoods across Cambridge.

ATTACHMENT 3 - PUBLIC COMMENTS

COMMENT 1: Pages 19-24: The detailed descriptions of the different funding mechanisms and status of the buildings are very helpful. One suggestion for additional information (either here or elsewhere) would be to indicate, for each development, the number of low income housing tax credit (LIHTC) units and the number of non-LIHTC units. (Given the income and other restrictions on LIHTC units, this would be an important piece of information for applicants, advocates, and the public to know).

CHA RESPONSE 1: For sites that have closed and the number of LIHTC units are confirmed, we have included the count of LIHTC units in the Development Directory on the CHA website. We felt this was the best place and a more dynamic platform to present the information as sites close. To date, we do not have a count of LIHTC units for most sites. The sites where LIHTC units are confirmed include Woodrow Wilson Court (55 out of 68 units), LB Johnson (177 out of 177 units), Lincoln Way (64 out of 70 units), and Jackson Gardens (45 out of 45 units).

COMMENT 2: Page 19: Can you provide the addresses for the 47 new affordable units created 4/1/16 – 12/31/17?

CHA RESPONSE 2: The 47 units include 40 units at Temple Place, 6 units at Manning Apartments and 1 unit at Russell Apartments. Temple Place is completed and the remaining 7 are part of the ongoing construction.

COMMENT 3: Page 30: The format and details (of the unit and voucher inventory) are helpful.

CHA RESPONSE 3: CHA appreciates this comment.

COMMENT 4: Pages 31 and 40: I don't think that there are 103 MRVP (page 31) or 156 MRVP (page 41). Given that tenant-based (and "regular" project based) MRVPs are the only remaining source of affordable housing in CHA's inventory for those without the HUD-required immigration restrictions, it is important to provide the

a. number of tenant-based MRVP (26?)
b. number of project-based MRVPs and location (Linwood Court 17; Kennedy Biscuit Loft – 2, ___ Magazine Street – 1)
c. number of mod rehab MRVPs at the YWCA (29?)

I think the other units counted as "MRVP" may be DMH project based subsidies located at the YWCA (29?) and elsewhere so those units should be separated out from the MRVP total (as they are not MRVPs and only available to a narrow subpopulation) and the number or program type stated.

CHA RESPONSE 4: The MRVP unit counts referenced by the commenter reflect funding allocations and the manner in which CHA's fiscal department categorizes MRVP funding. They do not represent vouchers leased up. The inventory includes 28 leased up MRVP mobile vouchers and 19 leased up MRVP PBA vouchers. Currently active MRVP PBA increments in CHA's database includes Linwood Court, Kennedy Lofts and Church Corner. According to the set up table, Linwood Court consists of 20 PHA baseline units, Kennedy Lofts consists of 2 PHA baseline units and Church Corner consists of 1 PHA baseline unit. The remaining units types under the MRVP funding allocation are SRO and shelter-based units.

COMMENT 5: Page 34: Although I noticed the footnote stating that the information on the chart (Younger Disabled Resident Composition by various buildings) should not be confused with the Designated Housing Plan (DHP), I do think it would be useful to separate out the buildings by those are included and not included in the Designated Housing Plan. That will provide a more accurate picture of whether or not the CHA is in compliance with the approved DHP (as to the number of young disabled tenants in each development) rather than masking this by including the Roosevelt Mid-rise (non DHP) at 30.6%.

CHA RESPONSE 5: The table has been revised so that sites under CHA's Designated Housing Plan (DHP) are indicated by an *. It is important to note that federal DHP compliance is on a site by site basis and not on an aggregate basis. Also, the report may under-report the total count of disabled households for households that are aging in place. In instances where a resident qualified as younger disabled at move-in and has remained but is now of elderly age, the report would designate that unit as being occupied by an elderly resident even though the resident composition has remained the same.

COMMENT 6: Page 41: The non-federal funds is listed as "in progress". If it is done, can you email?

CHA RESPONSE 6: The non-federal funds table has now been included in this report.

COMMENT 7: Page 76: In the narrative, it would be helpful to state the number of Section 8 tenants who are on minimum rent and paying more than 40% of income for shelter at move in. Those paying minimum rent include those with no income as well as those with very low income, so it is important to have the information on those tenants.

CHA RESPONSE 7: A new table has been included in the activity section to represent both (1) new admission households with zero income and (2) new admission households paying $50 minimum rent or less. In FY17, no new admissions at zero income or new admissions paying $50 minimum rent or less contributed 40% or more of their income towards rent.

COMMENT 8: Page 77 – 78: The CHA should include the total number of landlords who had signed up for the "vacancy" payments and signed up for the "damage" payments in the FY (as well aggregate data from prior years) as that will provide useful information about the importance of this MTW initiative. I believe that Hannah Lodi keeps track of this in the CHA's data base (at lease up).

CHA RESPONSE 8: Unfortunately, CHA does not have accurate information on this data point. When Hannah Lodi first started her position at CHA, she confirms that she tried to track this data point but was only capturing new applicant lease-ups and not moves/transfers.

COMMENT 9: Pages 79-82: It would be helpful to include the number of Section 8 households on minimum rent (page 79) and the number of households on the mixed immigrant formula (page 81). It would be helpful if CHA could modify its software so as to track the reason for interim rent adjustments (given the increase in the number and cost over the baseline) and thereafter report on that (page 82).

CHA RESPONSE 9: CHA intends to report on the count of minimum rent and mixed rent households but did not have sufficient time to include in the draft report. A table has been included in the activities section. Regarding tracking of interim rent adjustments, CHA will be able to better report on this when this feature has been upgraded in our software.

COMMENT 10: Page 84: Similarly, for public housing it would be helpful to include the number of households on minimum rent and the number of households paying mixed immigrant rent.

CHA RESPONSE 10: A table has been included in the activities section that includes the count of minimum and mixed rent households living in LIPH, RAD, and FPH units.

COMMENT 11: Page 88: Given the low number of hardship applications for rent decreases in both public housing and Section 8 programs (page 84) and given that 45% of public housing tenants responding to the CHA's survey were unaware of the hardship policy (page 109), we hope that CHA will change how tenants are made aware of the policy (and ideally, expand the policy so that it covers more tenants faced with unaffordable rent).

CHA RESPONSE 11: The hardship policy is available on the CHA website and introduced as part of the lease up process as well as at recertification and interim appointments. CHA welcomes suggestions on how to increase awareness of this policy to our residents.

COMMENT 12: Pros: Formatting was excellent. Sizing of headings, font colors, etc. make this document an easy read. Great way to start out the document with a CHA tenant-created art piece. I like the 3-D and color-coding on the chart on the next page. 3-D makes the page view less cluttered. However when copying MTW in black-and-white, the contrast of some color/font will be hard to see.

CHA RESPONSE 12: CHA appreciates this comment. The commenter is correct that a black and white version of the Report does not show contrast as well as a color version and is more difficult to read. The report graphics was not designed to be read in black and white and CHA is not considering designing future graphics in black and white.

COMMENT 13: General Comments: 3-D chart on page before Table of Contents has no specific education/employment programs. I noticed they were eliminated (page 96). I think many tenants weren't even aware of these programs when they existed. Advertising for these programs isn't reaching most people.

CHA RESPONSE 13: CHA appreciates this comment. The 3-D chart represents MTW-specific activities currently in place. The activities referenced on page 96 were closed out as MTW-specific activities. One activity, the Work Force Success Initiative, is currently in place and available only to CHA youth participating in the Work Force. The activity was closed out as an MTW activity because no MTW authority is required to operate the program. The program is operating at full capacity and all Work Force participants are banked according to program requirements. The other activity, Career Family Opportunities (CFO), required MTW authority and was closed out and no longer in operation because it was too costly and not achieving the goals that CHA had intended.

COMMENT 14: Request: page 92--Transition to Market Rent/Public Housing. Insert a note specifying that this program is not mandatory for tenants.

CHA RESPONSE 14: Transition to Market Rent is an approved MTW activity that CHA has not yet implemented. It is premature at this time to specify that the program is not mandatory, particularly considering that program rules have not yet been developed and there is no program for a tenant to enroll in even if a tenant expresses interest.

COMMENT 15: CONFLICTS: There is no infrastructure within CHA policies to handle conflict escalation/resolution between residents, particularly residents who struggle with substance abuse addiction and mental health issues. By the time management has heard from residents; the conflict has sometimes escalated to violence or intimidation. Because of confidentiality policies CHA has a real hands off approach in addressing this problem.

CHA RESPONSE 15: Tenant-to-tenant conflicts described by the commenter are issues for all multi-unit residential buildings, including luxury housing units. The commenter has identified an universal issue that landlords are often faced with and, as general practice, do not get involved in for a number of reasons. CHA is in a difficult position legally as the managing entity when conflicts arise between tenants.

COMMENT 16: ASSET DEVELOPMENT/SELF-SUFFICIENCY There are no programs that assist seniors or disabled young people with building assets. Family developments are encouraged to pursue self-sufficiency. There is a lack of resources or attempts to work with these senior/disabled residents so they can have some kind of control, feel hopeful about their future by building or creating assets. I am referring to asset development or a program that enables residents to buy supplies or save for diabetic shoes, medical equipment or have matching savings account (with a modest goal), funeral expenses. Any effort that encourages a sense of autonomy. The reality of never having enough money to buy a computer, purchase apartment insurance is an obstacle that can be overcome through a program.

CHA RESPONSE 16: The FSS+ and Rent-to-Save program does not exclude elderly, younger disabled residents, or fixed income households from participating in the program. CHA would be interested in partnering with asset-building organizations that work directly with the population described by the commenter and asset models that promote savings for households that are on fixed/limited income and plan to age in place in CHA housing. CHA welcomes suggestions on partnering with programs that work with residents to increase a sense of autonomy and economic empowerment.

COMMENT 17: COMMUNICATIONS There is a wide gap in having information disseminated, received and ultimately understood so that all parties are on the same page to meet common goals and secure CHA as a welcoming community for all.

There are glimmers of hope that CHA does try to work with residents through workshops, conferences and meetings with CHA staff. I recognize and appreciate the difficulties working in any environment within the housing spectrum. As an advocate I will continue to express the concerns that living here is sometimes stressful, overwhelming and depressing. The challenge is in supporting each other and creatively allocating limited resources within the community, BUT above all listening to residents and making sure they are heard and considered in their homes and communities.

CHA RESPONSE 17: CHA appreciates this comment and the work of the commenter as a resident and advocate. Recently CHA formalized a partnership with Cambridge Economic Opportunity Committee (CEOC). CHA recognizes the critical role that this partnership plays in empowering and supporting CHA tenants.

COMMENT 18: In this Report, CHA has made the extra effort to include information that is not required by HUD, data points such as the percentage of new vouchers leased-up in Cambridge, and the number of participating landlords in and outside Cambridge, providing a more complete picture of the ways in which CHA has used its MTW authority to meet the housing needs of lower income people in this very expensive private rental market. I especially appreciated the section of the report which described the impact of the CHA's sponsor-based program by highlighting the individual stories of participants (the losses they experienced as well as their successes). As CHA points out in this Report, HUD requires the use of certain metrics to measure MTW activities, even when it is "misleading." For example, HUD requires CHA to report on the increase in rental revenue collected and the number of households that leave CHA housing, exit TANF, and become employed full or part-time, as a result of Rent Simplification (RSP)/Public Housing, though these are not required or intended outcomes of RSP. I encourage CHA to continue to include in the Annual MTW Plan/Report agency-developed metrics in addition to the required Standard HUD Metrics.

CHA RESPONSE 18: CHA appreciates this comment and included the new data points with the intention of continuing to report them in future Annual Reports.

COMMENT 19: In my comments on the CHA's FY 2018 Draft Annual MTW Plan, I asked, what do we know about the savings habits of CHA public housing households who have been recertifying on a biennial basis (as part of RSP/PH) since FY 2006? The 2017 CHA Resident Satisfaction Survey included several questions having to do with finances. Seventy-eight % of the 421 residents who responded to the question "Have you added to your savings in the past year?" indicated they had not, chiefly, because of household bills (groceries, internet, phone, etc.). (CHA Resident Survey 2017 Aggregate Results, pages 29-30) Fifty % of respondents identified having savings to pay for an emergency as one of the three financial goals that they wanted to work towards, while 29.6 % would like to pay off all of their loans, and 26 % selected the statement "I have no financial goals at this time." (Ibid., page 34) Given these results, I was surprised that CHA did not mention residents' financial concerns in the Executive Summary. (Draft Annual MTW Report FY 2017, Attachment 2 – Resident Satisfaction Survey Summary, Recommendations, pages 111-112)

CHA RESPONSE 19: The Executive Summary included a section on financial considerations that identifies some of the data points described by the commenter. However, CHA did not include financial well-being-related actions steps in our recommendations. We do not directly provide these services and we could not realistically commit to any new policies or programs that would increase residents' financial well-being.

COMMENT 20: The survey asked residents about the CHA's hardship policy, but only in relation to the limit on interim rent requests. Forty-five % of respondents indicated that they are unaware of the CHA's hardship policy. (CHA Resident Survey 2017 Aggregate Results, page 7) It is not clear whether the 54 % of respondents who are aware of the policy know the rest of the policy, including who qualifies for a waiver under the rent simplification hardship policy. (Ibid.) This was a missed opportunity to educate residents.

CHA RESPONSE 20: The Resident Satisfaction Survey was designed to gather feedback from residents in topic areas that departments sought information, with a focus on customer satisfaction. Our original list of questions was longer and we pared it down to less than 50 questions. While it would have been optimal for the survey to serve multiple purposes, including as an educational tool, we decided to develop as short a survey as possible with the understanding that it would be less burdensome, increase the likelihood that respondents will finish the survey, thereby yield a higher response rate.

COMMENT 21: In FY 2017, there were four hardship applications, three of which were granted. We do not know the reasons why there were no applications in FY 2016. (Draft Report, page 88) The revised HUD Form 50900 states "The MTW PHA must establish a hardship policy that clearly defines the circumstances under which households may be exempted or provided temporary relief from the activity. The MTW PHA must describe how such households could access the hardship policy and the associated process." (Form 50900: Elements for the Annual Moving to Work Plan and Moving to Work Report, Attachment B to the Moving To Work Agreement Between the U. S. Department of Housing and Urban Development and Moving to Work Agencies, Expiration Date: 01/31/2021, page 16) Is it accurate that CHA will be required to include information on where to find the policy, and the process for applying for a waiver, in the next Annual MTW Plan?

CHA RESPONSE 21: The upcoming FY19 Plan will be subject to the revised HUD Form 50900 and CHA intends to conform with any changes that occurred in the form since the last iteration. The hardship description referenced by the commenter is for proposed MTW Activities seeking HUD approval. CHA's Rent Simplification Program would not require that the hardship information referenced be included in the next Annual Plan. However, if CHA proposes a new rent reform activity, then CHA would be required to include hardship information as referenced above.

COMMENT 22: According to the Executive Summary, "door-to-door surveys" were conducted at Corcoran Park, Jefferson Park, Jackson Gardens, and Lincoln Way. However, Jackson Gardens and Lincoln Way are not listed in the chart 2017 Surveys Completed by CHA Team. (Draft Report, pages 108 – 109) Based on the number of occupied units reported in the chart, I am assuming that sites have been combined. Were there any responses from Woodrow Wilson Court? Did the CHA Teams include any bilingual speakers?

CHA RESPONSE 22: The commenter is correct that sites were combined according to the organization of CHA's site management teams. Woodrow Wilson Court was part of the Putnam Gardens team and Lincoln Way was part of the Jefferson Park team. There were 11 responses received from Woodrow Wilson Court. The CHA Teams in the survey participation table references site management teams in the Operations Department and not door-to-door survey teams. The door-to-door survey was administered by an individual. She was accompanied by a tenant coordinator. The tenant coordinator worked at the site surveyed and may have been bilingual depending on the site. The door-to-door surveys involved the surveyor having on hand hard copies of the survey translated into five languages. She distributed the preferred language version for tenants that opened their doors and agreed to take the survey. She also had an information sheet that non-English speakers could point to to indicate their preferred language if they were unable to verbally communicate this to the surveyor. The surveyor returned to the units within the hour to collect the surveys. Respondents also had the option to drop off their survey responses in a box at a convenient location on-site.

COMMENT 23: The survey asked residents "Is there a language barrier that prevents you from interacting with neighbors?" Seventy-three % of respondents said no. (2017 CHA Resident Survey – Aggregate Results, page 4) However, the survey did not explore whether language barriers prevent residents from interacting with management staff. This past December members of the Haitian Action Group (HAG) met with CHA Executive Director Michael J. Johnston to share their experiences living in CHA housing. No HAG members had ever witnessed the site management staff using the language line. "It is more work for them. The attitude is, why don't you speak English?" HAG members expressed their concerns about elderly Haitian tenants who feel "there is no one to talk to, no way to communicate" when they receive a notice (e.g., a violation letter) written in English.

CHA RESPONSE 23: CHA appreciates this comment. The Executive Director is aware of this concern and is working with the Operations team to determine how this can be addressed as part of the strategic planning process for the Operations department.

COMMENT 24: It is worth noting that neither the CHA Resident Satisfaction Survey, nor the Leased Housing Survey, asked tenants whether their rent was calculated properly. One HAG member commented that when she went to her rent recertification appointment she asked her property manager to explain the change in her rent, but she wasn't "educated that rent is budget [income] based" or given a rent chart.

CHA RESPONSE 24: CHA appreciates this comment. This is an important concern that informs processes being addressed by CHA's strategic planning team.

COMMENT 25: The Report states that as of the end of FY 2017 over 10,000 applications had been submitted for the Housing Choice Voucher (HCV) program. The CHA HCV waitlist, which had been closed since June 2008, was re-opened on October 6, 2016. "Opening the waitlists provide a measure for demand for the voucher program which informs both CHA as well as the City when discussing the need for affordable housing." (Draft Report, page 12) I would suggest that CHA be more specific about the "demand and need" for deeply affordable housing. The great majority of applicant households on the CHA's waitlists, 70 %, are extremely low income (at or below 30 % of Area Median Income). Ten % of these households indicated in their applications that they had zero income. (Ibid., page 36)

CHA RESPONSE 25: CHA has added the sentence, "Please see waitlist tables for demographic information on applicants seeking CHA housing." at the end of the paragraph referenced. All waitlist income data is self-certified by the applicant and CHA cannot verify its accuracy until an applicant has been screened.

COMMENT 26: The CHA's family and elderly/disabled public housing waitlists were closed as of January 1, 2015 so that CHA could hold vacant units for existing tenants who had to relocate during RAD renovations. (The elderly/disabled public housing list was re-opened on July 5, 2017.) As of the end of FY 2017, there were 2,298 two-bedroom applicant households and 1,199 three-bedroom applicant households on the CHA family waitlist. (Ibid. page 37) I am aware that over a two-year period, beginning in the spring of 2015 and ending in April 2017, CHA issued 526 HCV tenant-based vouchers to eligible interested applicant households on the public housing waitlists; 330 households were able to use their voucher to find housing. Seventy-eight % of the new lease-ups were family households. (Dillon C. Harvey, Memo to Michael J. Johnston Re: Update on CHA's Issuance of Housing Choice Vouchers to Public Housing Applicants, 26 April, 2017) Though this was not a MTW activity, I think that it is worthy of mention in the Report as the issuance of vouchers to public housing applicants served to increase housing choices for low-income families. I would propose that future Reports report on the number of different types of applicant households on CHA's waitlists that were housed in the fiscal year.

CHA RESPONSE 26: CHA appreciates this comment and will look into developing a report to demonstrate types of applicant households that experienced new admission into CHA housing.

COMMENT 27: In FY 2017, 44 % of voucher lease-ups were in Cambridge. (Draft Report, page 73) I appreciate that CHA is including this data point in the Annual Report. "We believe this number is decreasing as the Cambridge rents continue to increase." (Ibid.) The percentage of voucher holders that were able to use their voucher to stay in Cambridge decreased from 68.58 % in March 2011 to 61.14 % in March 2016. (Presentation by CHA, Cambridge City Council Housing Committee Hearing, 12 April, 2016) It is worth noting that out of 705 RAD and disposition relocations, only 16 tenants moved with a tenant-based voucher, eight in Cambridge and eight outside of the city. (CHA Planning & Development Department, CHA Relocation Update, 1 January, 2018) The total number of landlords that participated in the CHA Leased Housing Program (defined as landlords that received at least one Housing Assistance Payment from CHA) in 2017 was 1,272. (Draft Report, page 78) I would be interested in knowing how many units these landlords rent, and how many of those units are rented to CHA voucher holders.

CHA RESPONSE 27: CHA is also interested in this information and examined our database to see if we could connect units and landlords in a more meaningful manner. However, a brief review of HAP payees (landlords) in the database indicates that although a landlord may own several building sites, each site may be represented by a unique ID (e.g. TIN) and payee description that does not tie back to a central landlord entity. CHA also follows this common practice with the establishment of LLCs for each RAD site. Also, there is no field in the CHA database that indicates the total units in a building attached to the HAP payee. This is true even for project-based sites in which not all units in the building are necessarily project-based. At this point, we are not able to extrapolate the data described by the commenter.

COMMENT 28: The CHA Annual MTW Plan FY 2002 reported on the results of a landlord survey which included those questions as well as the number of years that the landlord had participated in the voucher program. I understand that CHA is conducting a Property Owner/Landlord Survey as part of its strategic planning process. Will the aggregate results be made available on the CHA website? What does CHA hope to learn from the Leased Housing and Property Owner/Landlord surveys, and how does CHA plan to use the findings to inform CHA policies?

CHA RESPONSE 28: The Landlord survey is being completed as part of CHA's Strategic Planning Process. At this time there is no plan to make that available on the CHA website. Although, there will be some form of documentation of the strategic planning results. CHA hopes to learn from the surveys some best practice opportunities, ways to streamline and improve some of our current practices, and ways to identify better customer service opportunities. At this point we are unsure of the methods we will apply to inform CHA policies; however we believe that those opportunities will be identified through the strategic planning process.

COMMENT 29: The section of the Report "CHA Highlights" gives examples of how CHA met MTW's statutory objectives, housing choice, self-sufficiency, and cost effectiveness, in FY 2017. One of the outcomes of CHA's self-sufficiency activities was that "five sponsor-based voucher participants left the program and receive no public subsidies." (Ibid., page 9) What does "left the program" mean? Did they leave for positive reasons? Does "public subsidies" refer only to housing assistance or to all public benefits (i.e., TANF, SNAP, etc.)? It is noted later in the Report that two CASCAP clients transitioned off the program. "One resident is fully employed and receives no public subsidies. The other became a tenant-based voucher holder and achieved permanent housing." (Ibid., page 67) Do you have any additional information about the other four sponsor-based voucher participants who were leavers (e.g., the program they left or completed)?

CHA RESPONSE 29: CHA defines self-sufficiency as receiving no public subsidies and no housing subsidies in its data request to sponsor-based partners. Therefore if a participant is receiving benefits such as TANF and SNAP but no housing subsidy, the participant would not count as having achieved self-sufficiency. However, if the participant receives no benefit and moves in with family or friends, the participant would count as self-sufficient. Nonprofit partners provided the following information for those they identified as having achieved self-sufficiency: 1 individual is fully employed and stayed in his unit with no housing subsidy attached (CASCAP), 1 household moved in with family with permanent tenure (Heading Home), 1 household moved in with a friend (JAS Youthbuild), and 2 individuals moved in with family (Home for Little Wanderers - Roxbury).

COMMENT 30: The Report states that the goal of the Rent-to-Save Pilot (RTS, previously referred to as the FSS+ Expansion Pilot) is "to increase asset-building for residents and see if financial coaching makes a difference." (Ibid., page 14) Can you say more about what the Compass financial coaching program entails? How many Jefferson Park Federal tenants are currently enrolled in coaching? (Ibid., page 57) Has that number changed since the pilot began in March 2016?

CHA RESPONSE 30: Compass' financial coaching model generally starts with a series of workshops around common topic areas. A Compass financial coach is assigned to the client and meets one-on-one with the client at least 4 times in the first year following workshop completion. The following year, the coach will meet one-on-one with the client at least 2 times. The coach may meet with the client more times as needed. One of the learnings of RTS is that the workshops may be too burdensome and may prevent households from enrolling in financial coaching. The program design was altered so that enrollment in financial coaching involves one-on-one coaching sessions tailored for the client. Workshop topics may be addressed in the sessions as needed. At FY end, there were 34 JP households enrolled in coaching. When the pilot started on March 1, 2016, no JP households were enrolled in coaching. Financial coaching at JP is an RTS feature that the household must actively seek. The number has increased over time.

COMMENT 31: Jefferson Park Federal tenants are not required to participate in Compass's coaching program. CHA automatically creates savings accounts for all Jefferson Park Federal and Corcoran Park households. Since it is beyond the scope of the Report to report on the outcomes for individual RTS participants, we do not know whether Compass's coaching model makes a difference in advancing economic self-sufficiency. I appreciate that CHA states in the Report "It is too early to connect an end in subsidy to self-sufficiency and the RTS program. The two RTS participants that left CHA housing include [sic] (1) One resident lived in the unit for less than one month and (2) one resident moved in with relatives." (Ibid., page 58)

CHA RESPONSE 31: CHA appreciates this comment.

COMMENT 32: The "average earned income of RTS participants that have earned income" is reported to have been $37,532. (Ibid., page 56) In FY 2017, how many RTS participants out of a total of 321 participants had earned income? For the purpose of SS #1: Increase in Household Income, what counts as earned income? Can you explain why the "average earned income for all RTS participants" was $23,970, a difference of roughly $14,000?

CHA RESPONSE 32: There were 205 RTS participants with earned income. Earned income includes any wage income, or other income resulting from owning a business, pension, military, and other sources. The decrease from $37,532 to $23,970 reflect how the average is brought down when 116 households with $0 earned income are folded into the average.

COMMENT 33: Does the metric CHA: Increase in Credit Score include only FSS+ participants "who have been in the program for at least one year and experienced an increase (in points)"? The average increase in credit score points for those FSS+ participants, 44 points, did not meet the benchmark of 45. CHA explains that "some participants have accounts in serious delinquency or in collection. Improvements in credit score may take longer …" (Ibid., page 58) It is worth mentioning that credit requirements to be accepted in market-rate rental housing vary by location. The average credit score of successful rental applicants in Boston, one of the most expensive cities for renters in the country, was 737 in 2017. ("What credit score do you need to rent an apartment? Insanely high, if you're in Boston or San Francisco," 3 November, 2017, www.rentcafe.com/blog/rental-market/credit-score-to-rent-an-apartment/)

CHA RESPONSE 33: The 44 points was provided by Compass is based on the description provided. CHA appreciates the commenter's information on the role of credit scores in securing rental units in expensive cities such as Boston and Cambridge.

COMMENT 34: Does CHA know the average credit scores of current FSS+ participants? I would encourage CHA to request from Compass the average credit scores of FSS+ graduates and include this information in the Report.

CHA Response 34: CHA does not know the average credit scores of all FSS+ participants and is working with Compass on gathering additional data points of the program.

COMMENT 35: In FY 2017, there were 16 FSS+ participants who graduated from the program; eight of these households remained in the HCV program, five were able to purchase a home, and three moved to market-rate rental housing. (Draft Report, page 58) Does Compass conduct exit interviews with FSS+ graduates? For FSS+ graduates who leave the HCV program for positive or neutral reasons, it would be helpful if Compass asked them what type of housing they were moving to, and whether they were staying in Cambridge or leaving the city.

CHA Response 35: Compass may conduct informal exit interviews with FSS+ graduates. CHA recently requested data on where clients purchased homes. Compass confirmed that they do not systematically collect the location that clients move to when they are moving to market rental housing. Case notes may or may not include the information. For example, of the 9 graduates that moved to market rental housing, case notes indicated that 2 graduates moved to units in Cambridge and 1 graduate moved to Leominster. No locational information is available for the remaining 6 graduates. For the 9 graduates that purchased a home, case notes indicate that 2 purchased in Everett. In addition, 5 FSS graduates purchased homes in Lynn, North Providence, Billerica, Roslindale and Nashua. Compass does not have notes on the home purchase location for the 2 remaining graduates. Both were early graduates.

COMMENT 36: I would also be interested in reading in the Annual Report: the FSS+ participation rate, the percent of eligible non-elderly, non-disabled CHA MTW HCV participants who voluntarily enrolled in FSS+; the graduation rate of FSS+ participants, the number and percent of graduates each year, and the number of years it took them to reach graduation; the number and percent of graduates who exit assisted housing; and the number and percent of participants who leave or are terminated from the program.

CHA Response 36: CHA is also interested in the data points described. We are developing reports to extract this data from CHA's database. It has been an involved project and complicated process. The data reports are not yet finished. CHA intends to include the above data points, to the extent possible, in the next Report.

COMMENT 37: A total of 32 CHA households, including public housing, RAD, and Former Public Housing (FPH) households, transitioned to homeownership or market-rate rental housing in FY 2017. (Ibid., page 88) (Were the three FPH households who left CHA housing residents at Millers River and Russell Apartments?) CHA explains that this data is "based on inputted end of participation (EOP) reason codes based on information from the households leaving CHA housing. CHA cannot verify if the household has purchased a home or moved into a market rent unit." (Ibid.) Can CHA verify that these households left CHA housing for positive or neutral reasons?

CHA Response 37: The 3 FPH households lived in Millers River. CHA can verify that the 32 households left for positive or neutral reasons. Please see CHA Reponse 38 below for information about CHA's EOP reason codes.

COMMENT 38: Is moving to an inclusionary ownership or rental unit considered moving to the private market or to another type of affordable housing?

CHA RESPONSE 38: The list of End of Participation (EOP) reason codes for CHA's hard units does not include inclusionary as a separate and distinct reason. Therefore, CHA staff likely selected "rented" or "purchased" as EOP reasons in instances where tenants indicated inclusionary homeownership or rental as the reason they were exiting CHA housing. The table in the Rent Simplification Activity for CHA Hard Units (public housing, RAD, and FPH) should include households that left CHA to live in an inclusionary unit.

COMMENT 39: One of the recommendations of the 2017 Abt Associates report Testing Performance Measures for the MTW Program was that MTW agencies be required to measure and report on the "share of households making positive exits from assisted housing (i.e., exits that suggest self-sufficiency)." (Abt Associates, Testing Performance Measures for the MTW Program, sponsored by the Public and Affordable Housing Research Corporation at HAI Group, 25 July, 2017, page 12) However, the challenge is that most public housing agencies (MTW and non-MTW) "do not collect data on the nature of exits from assisted housing." (Ibid.). I appreciate CHA's comment regarding exit interviews. "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." (Draft Report, page 88) Would it be possible for CHA to exclude from its count of households that transitioned to self-sufficiency neutral and negative exits from CHA housing?

CHA RESPONSE 39: In instances where there is an end of subsidy (EOS) count attached to HUD's SS8 metric, CHA only included households with EOP reason code "Rented" or "Purchased" for households living in CHA hard units and descriptions indicating paying full HAP for voucher holders. We believe these reasons best reflect the intent of the metric. Additional reason codes such as "deceased", "lease violation", "moved without notice", "moved without notice", "program transfer", "moved to nursing home", "eviction", "other", "unknown" and "Moved in with Relatives" were not included in the SS8 count. CHA's EOP reason codes are broad and many and difficult to aggregate because the system is designed so that unique descriptions can be added at any time by CHA staff.

COMMENT 40: I am curious as to the reasons why HUD is requiring the use of End of Subsidy as the unit of measurement for the metric SS#8: Households Transitioned to Self-Sufficiency/PH/RAD for CHA's Rent Simplification Program (RSP)/Public Housing. "CHA maintains that it is misleading to track this metric as part of this activity [sic] it is not a required or intended outcome." (Draft Report, page 91) HUD is also requiring CHA to report on the number of households removed from TANF, and the number of households who are employed full or part-time for the MTW activity RSP/PH, though leaving TANF and employment are not requirements under CHA's rent simplification policies.

CHA RESPONSE 40: CHA appreciates this comment and agrees with the commenter.

COMMENT 41: Has there been a significant change in the number of public housing leaver households since the implementation of the main elements of rent simplification (i.e., biennial recertifications, the tiered rent schedule, and pared back deductions) in FY 2006? Has there been a change since the CHA began the conversion to RAD?

CHA RESPONSE 41: CHA does not have baseline EOP data on public housing households before Rent Simplification was implemented. We also would like to know the proportion of positive and negative EOPs before and after Rent Simplification. CHA's database used in FY06 has been discontinued and any archived data is not accessible. Changes since conversion to RAD is more difficult to determine because the population has contracted as units are held for relocation. Also it would be difficult to tie any significant changes to rent simplification versus other external factors associated with RAD and relocation.

COMMENT 42: I recommend that CHA report on the average length of stay of CHA public housing/RAD/FPH and HCV households, and of different household types (i.e., elderly, disabled, and non-elderly families with children), in the Annual Report. Nationally, the average length of stay of HCV households who left the program in 2015 was 6.6 years, and the median length of stay was 4.8 years. For public housing households that exited in 2015, the average length of stay was 5.9 years, and the median length of stay was 3.0 years. (U.S. Department of HUD, Office of Policy Development and Research, Multi-Disciplinary Research Team, Length of Stay in Assisted Housing, Submitted by Economic Systems, Inc., Prepared by Kirk McClure, October 2017, page v) Market conditions impact how long households remain in publicly assisted housing. "Where the rents on housing in the private marketplace are comparatively high or the availability of rental housing is comparatively low, households in assisted housing stay longer. Where alternative housing in the private market is expensive and scarce, households will stay longer in assisted housing." (Ibid., page 32) According to the 2016 Cambridge Inclusionary Housing Study, there are 0.0 % available three-bedroom apartments and .8 % two-bedroom apartments in the private rental market in Cambridge that are affordable to four-person households with incomes at or below 80 % of Area Median Income. (David Paul Rosen & Associates, Cambridge Inclusionary Housing Study, 27 March, 2017) There are 31 higher earner (incomes exceeding 120 % of Area Median Income) households living in CHA housing. The average length of stay of these households in their unit in August 2017 was nine years, 4.5 months; the median length of stay was six years, 10 months. (Draft Report, Attachment 1 – Higher Earner Households Fact Sheet, page 105) I would be interested in comparing the average length of stay of higher earner households with ceiling rent income households, a somewhat larger group of 150 CHA public housing residents and 97 RAD residents. (Draft Report, page 84) I would not be surprised to learn that ceiling rent households are staying as long in CHA housing as higher earner households, and are staying longer than their counterparts living in public housing in less expensive housing markets.

CHA RESPONSE 42: CHA shares the commenter's interest in this information. In our list of data reports to be created to supplement future annual reports, length of stay is on the list. It is also important to note that the ceiling rent count referenced above includes any household that paid ceiling rent at least once. Any household that transitioned off ceiling rent or moved into ceiling rent during the FY was counted. We would like to think more carefully about designing a report that compares ceiling households to higher earning households to CHA's general population. Also, the number of ceiling rent households may decrease as more buildings convert to RAD and the rent schedules include more income bands.

COMMENT 43: It is worth noting that applicants for affordable three-bedroom homeownership units have the longest wait time in the City's Homeownership Resale Pool. The three-bedroom pool also has the highest percentage of Cambridge residents, 89 %; and 78 % of this pool are Cambridge resident households with children. (Chris Cotter, Housing Director, and Anna Dolmatch, Housing Planner, Cambridge Community Development Department, Memo to the Cambridge Affordable Housing Trust, Re: First-Time Homebuyer Program Update, 25 May, 2017).

CHA RESPONSE 43: CHA appreciates this comment. CHA's larger bedroom-size units are also supply restricted and in high demand with longer wait times and slow turnover. We also think it is important to look at length of stay relative to bedroom-size and development type when we determine data points for our length of stay report.

COMMENT 44: The Report includes a one-page summary of the findings of the PT Lab research project Understanding Higher Earners' Housing Needs. In FY 2017, interviews were conducted with 26 individuals representing 18 higher earner households living in CHA housing. (Draft Report, Attachment 1 – Higher Earner Households Fact Sheet, page 105) The idea behind the study was to find out if these 'over-income' families were "considering or interested in purchasing a home and in what ways, if any, CHA could play [sic] in supporting homeownership." (Draft Report, page 15) According to the summary, "21/26 interviewees are thinking or have thought about purchasing a home. 14/21 are still considering homeownership. 12/26 not interested were once interested, but are no longer due to age. 10/12 not interested in homeownership are elderly or students." (Draft Report, page 105) Are the interviewees who are still considering or are interested in homeownership only thinking of buying a home in the private market? Have they attended one of the City's affordable housing information sessions? Are they aware of the City's affordable homeownership programs? (Households with incomes up to 120 % of Area Median Income are eligible for HomeBridge's pilot program.) Do we know what homeownership means to these families?

CHA RESPONSE 44: CHA has not made contact with interviewees since the research was completed in Summer 2017. Therefore, we do not know if those interested in homeownership are interested in private market, limited-equity/deed-restricted, or any other homeownership structure. Six (6) out of the 14 interviewees that were considering homeownership had completed a homeownership class. The research did not tally whether the classes attended were part of the City's affordable housing informations session or first-time homebuyer class. Though, some interviewees anecdotally shared that they were. One of the concerns commonly raised about the City's homeownership programs was the inability to grow assets in line with the market. Although the income threshold for HomeBridge is higher at 120 AMI, most of the households interviewed were above the threshold. Regarding what homeownership means to the families, this was not an interview question in the research project and we do not know what homeownership means to these families. General comments around homeownership included, but were not limited to, being able to capture market growth at future sale, being able to pass on the property to family, having more space, and being able to do what you want with your space without dealing with management.

COMMENT 45: I strongly encourage CHA to continue its research on the locational choices of CHA tenant-based voucher households who live outside of Cambridge. In FY 2017, a PT Lab intern surveyed "all CHA mobile voucher holders living outside of Cambridge to understand the factors, if any, that led households to reside where they are and if there is interest in moving to Cambridge." (Ibid., page 15) The high cost of housing in Cambridge is presumed to be the determining factor in making the decision to leave the city; households who have been lucky enough to win the lottery want to use their voucher to stay in Cambridge. As a member of the Cambridge Affordable Housing Trust Subcommittee on Tenant Selection Preferences, I have been participating in a review of the preference policies and priority points system for the inclusionary housing program. The local preference for Cambridge residents is the most impactful preference. (The priority point system for inclusionary rental housing is as follows: current Cambridge resident, four points; a household with at least one child under 18, one point; a household with at least one child under six, one point; and a household with an emergency need, one point.) Some city councillors and advocates too want to broaden the definition of a local resident to include former residents

who were displaced, or involuntarily displaced, from the city, including CHA tenant-based voucher holders who left Cambridge. Can we answer the question, how many former residents want to return?

CHA RESPONSE 45: CHA is also interested in continuing the research that was started in Summer 2017. Although the report is unfinished, a cursory review of survey results indicates that 105 out of 131 (80%) respondents had previously lived in Cambridge. 102 out of 114 (89.5%) respondents wanted to live in Cambridge in the past. 77 out of 114 (67.5%) indicated that they want to live in Cambridge now. Based on these responses, we cannot answer the question of how many former Cambridge residents want to return to Cambridge.

COMMENT 46: Last May, CHA offered all of its 751 tenant-based voucher households who live outside the city the opportunity to move back to a new or newly renovated unit at one of CHA's RAD or FPH project-based voucher developments. The letter of opportunity explained "these properties are funded through CHA's Project-Based Voucher (PBV) program. The PBV is attached to the apartment and is not mobile. If you apply and are approved to move to any of these four developments, your Tenant-Based Voucher (TBV) will be replaced with a PBV." (Michael J. Johnston, CHA Executive Director, "Dear Resident." 15 May, 2017) How many of these households were interested in moving back to Cambridge?

CHA RESPONSE 46: At the time of this writing, 83 out of the 751 (11.5%) households we reached out to expressed interest in the opportunity. At this writing 32 out of the 83 households have been contacted for screening. 3 out of 32 became ineligible because they moved into a project-based unit. 4 out of 32 declined because they did not want to give up their voucher. 18 households started but did not complete the screening process (ie, did not documentation and did not attend next scheduled appointment). 12 are currently in the screening process. 2 have given up their voucher and moved into CHA units. The remaining 47 households have not yet been contacted because CHA does not have available the appropriate bedroom size units that they need.

COMMENT 47: Did the prospect of losing mobility factor into the decision not to return? The findings of the survey would help to inform the discussion about the City's tenant selection policies. Is there a "better definition" of local preference? The section of the survey dealing with the voucher holder's history in relation to Cambridge is particularly relevant. I want to know what voucher holders had to say in response to such questions as: "Have you wanted to live in Cambridge in the past? Do you want to live in Cambridge now?" and "Did you attempt to look for housing options in Cambridge during your search with your voucher? If no, explain in a few sentences why you chose not to look for housing in Cambridge." (Survey of "HCV Outside Cambridge," July 2017) When does CHA anticipate that a summary of the survey results will be ready to share with the community?

CHA RESPONSE 47: This is an interesting question and it important to note that the survey was sent to the same 751 tenant-based voucher holders that were offered a PBV unit in Cambridge. 83 out of 751 (11.5%) expressed interest in a PBV unit in Cambridge. 143 out of 751 (19%) responded to the survey, though not all answered every question. I think it is important to recognize that respondents from both inquiries were self-selected and we cannot determine how many of the 83 interested voucher holders also submitted survey responses. Therefore, it is important that the outcomes of one effort are not used to help understand outcomes of the other effort.

Please see CHA Response 45 for results to some of the questions posed. Regarding the question on whether respondents looked for housing in Cambridge during their housing search, 103 out of 130 (79%) stated they looked in Cambridge. The remaining 27 respondents provided a range of responses that included but were not limited to:

- Parking.
- Too expensive.
- Could only find a PBA with 30 families, want a 3 family.

- Homeless and relied on existing network outside Cambridge.
- Did not like school department and safety of child living in Cambridge.
- Liked where they were living outside Cambridge (e.g. Arlington, Winchester).
- Voucher not enough.
- Could not get any information.
- Too much construction and looking to get away from Cambridge.
- Cambridge could not offer affordable units comparable current unit in Boston (design, amenities, mainentance/management). Prefer life choices in Boston than Cambridge.
- Works and lives in same town.
- The building outside Cambridge that applicant was living in accepted the voucher.
- N/A

6 out of 27 respondents mentioned expensive and high cost reasons.
2 out of 27 respondents mentioned parking.
2 out of 27 respondents mentioned crime and lack of safety for their children.
9 out of 27 respondents expressed that they deliberately sought and preferred housing outside Cambridge rather than providing reasons for why it was difficult to find units in Cambridge or attributes that they did not like about Cambridge.

At this time, CHA does not a sense of when the survey results will be ready to share with the community.

COMMENT 48: The Report states that "The Operations Department has begun screening prospective residents for future occupancy of the new JP State Development …" (Draft Report, page 11) Can you report on the number of original Jefferson Park State households who will be returning to the new Jefferson Park Apartments? A small edit: I would suggest changing "JP State Development" to Jefferson Park Apartments.

CHA RESPONSE 48: At this time, 28 original JP state households will be returning to the JP site (104 total units). The remaining 76 units will be filled by other tenants (e.g. Russell relocation, JP basement transfers). CHA agrees that the JP State Development site should be renamed and the agency is in the process of reviewing options.

COMMENT 49: Lastly, I want to propose that CHA develop a local definition of opportunity neighborhood or area, and include it in the MTW Plan/Report. The metric HC#5: Increase in Resident Mobility is used for several of CHA's housing choice MTW activities, including Allowing Households to Pay Over 40 % of Income Toward Rent at Move-in/HCV. It is measured by the "number of households able to move to a better unit and/or neighborhood of opportunity (increase)." (Draft Report, page 76) In FY 2017, the numeric benchmark of 37 households was not achieved; 11 households were paying over 40 % of their income for rent at initial lease-up. The Report explains "This activity is available [sic] provide more choice for households that may not otherwise be able to live in opportunity neighborhoods, specifically Cambridge." (Ibid.)

CHA RESPONSE 49: CHA appreciates this comment. With regard to HUD metrics, we interpret "better unit and/or neighborhood of opportunity" as binary - whether or not the voucher holder has secured a unit. In Form 50900 HUD does not define "opportunity neighborhod" so we give the voucher holder agency in selecting the neighborhood and unit. We believe that a household being able to stay in a hard unit or move into a unit that the they seek to live in, is in itself, "a move to a better unit and/or neighborhood of opportunity" even if it may not have been the voucher holder's first or preferred choice. Otherwise the household would be in neither a unit or neighborhood. Of the many definitions of opportunity neighborhood, a common

indicator is poverty level. We believe housing options in the greater Boston area would rely heavily on other critical variables in defining opportunity and establishing a local approach or methodology would be a large undertaking that we are not yet ready to tackle. Also, does it make more sense to create a CHA-specific definition or adopt a definition/approach that has already been created? These are some of the questions we would want to carefully consider.

COMMENT 50: I have probably asked this before, are all neighborhoods of Cambridge neighborhoods of opportunity for low-income families? To give an example, in the Agassiz neighborhood, an area that has "traditionally been underserved by affordable housing" (in the words of a city housing planner), there are 0.0 % female head-of-household with children households living in poverty. (Cambridge Community Development Department, City of Cambridge, Massachusetts, Neighborhood Statistical Profile, April 2016, 2010 – 2014 American Community Survey data, page 38) I think it is important that the MTW Plan/Report describe the opportunities that are made available to low-income families if they are able to move to a better neighborhood.

CHA RESPONSE 50: CHA absolutely considers all Cambridge neighborhoods as neighborhoods of opportunity. However, we are unsure what the commenter is suggesting regarding using the Plan and Report to describe the opportunities made available to low-income families able to move to a better neighborhood. We see the Agassiz neighborhood as much of a neighborhood of opportunity as Area 4 or Strawberry Hill. CHA believes that retaining and increasing the number of hard units anywhere in Cambridge is the most realistic strategy to preserving housing for CHA families. This is emphasized in the planning and development narrative and in some of our approved MTW activities.