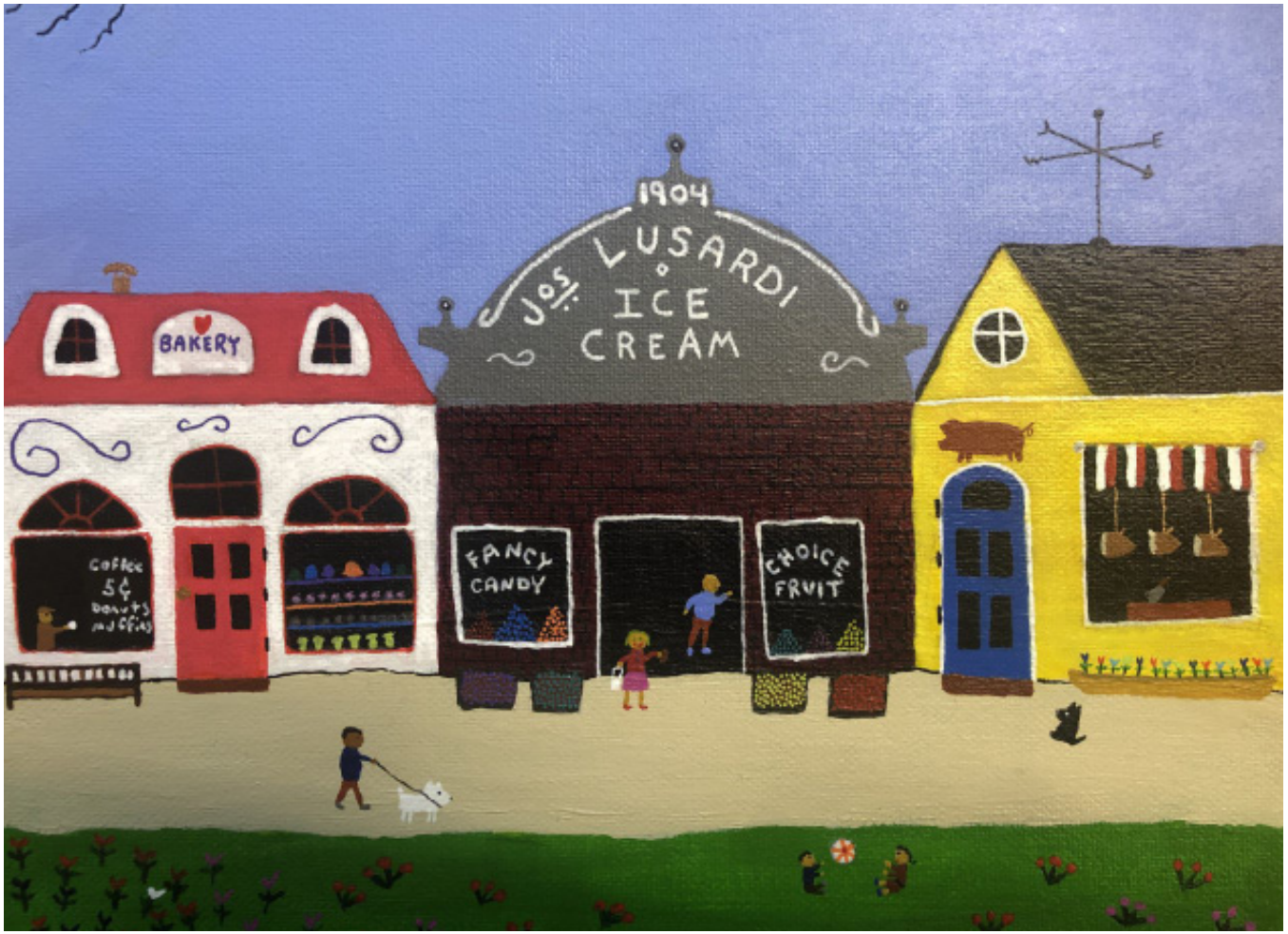
CAMBRIDGE HOUSING AUTHORITY

MOVING TO WORK

CHA

ANNUAL REPORT 2019

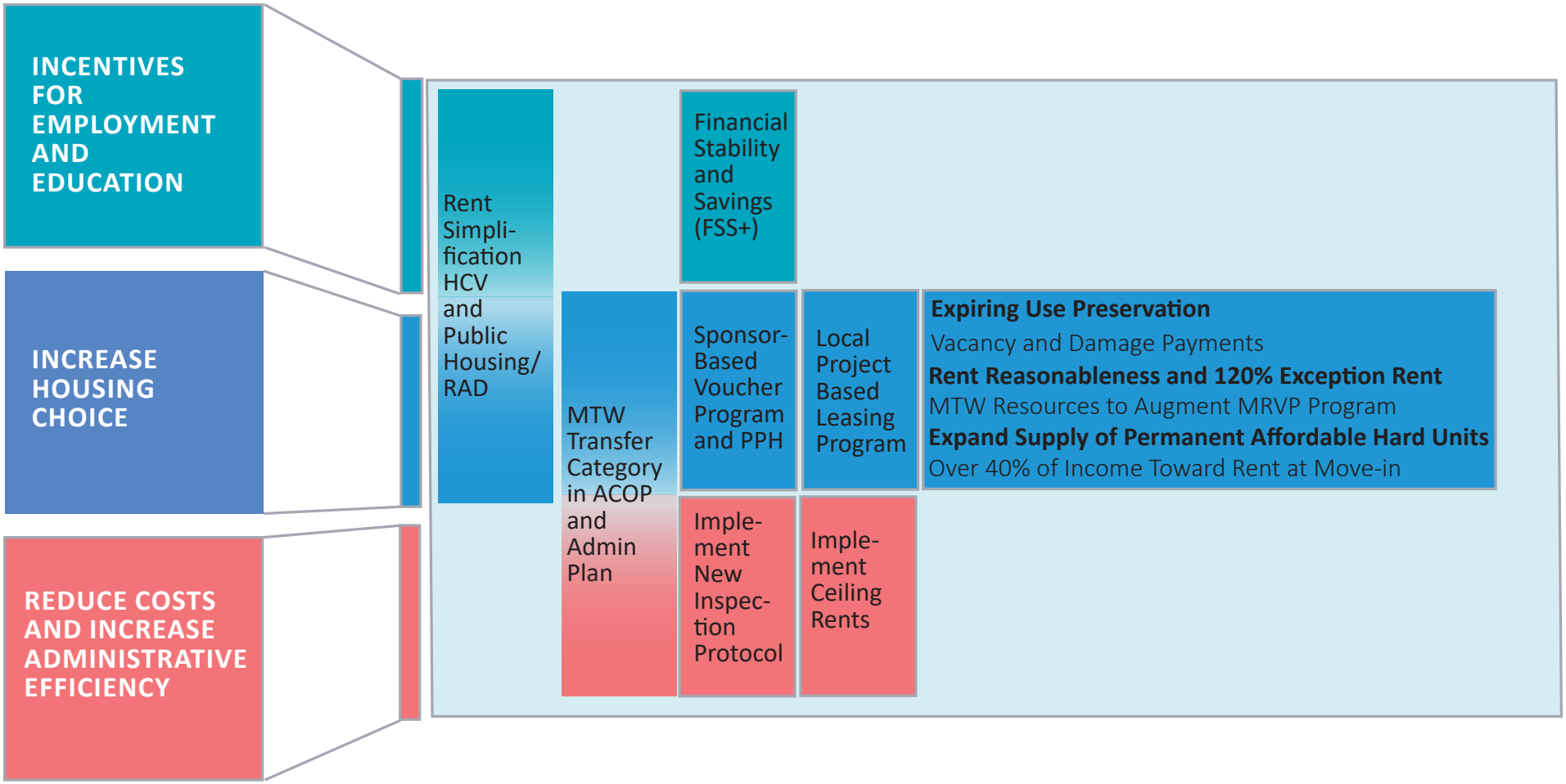
January 1, 2019 - December 31 , 2019



Community - Acrylic on Canvas
Emmanuel "Manny" Lusardi
Annual Art Contest Winner

In the artist's words: "My painting was influenced and inspired by an antique photo of my immigrant grandparent's store circa 1904.

Shops, stores, and businesses of many different types, often represent the center or heart of many communities across America, just as Central Square represents the heart of Cambridge. A place where people from all walks of life regardless of social status, education, age or background can gather. Throughout American society, the center is a microcosm of diversity represented by any community. Throughout American history individual businesses change, including the type of business and occupants. American life will always include a business center that welcomes all in the community."



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

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

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FREQUENTLY USED ACRONYMS

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

CHA HIGHLIGHTS

ANNUAL REPORT FISCAL YEAR 2019

JANUARY 1, 2019 TO DECEMBER 31, 2019

HOUSING CHOICE

- Transition to Small Area FMRs providing greater housing choice for HCV participants.
- Awarded 136 vouchers to preserve additional units at 808- 812 Memorial Drive.
- Conversion of an additional 331 federal public housing units to the Section 8 platform bring the overall total of units converted to 2,226 units or 92% of CHA's federal public housing portfolio

SELF-SUFFICIENCY

New FSS+ Escrow Calculation and Homeownership Incentive

- New income band-based escrow calculation to benefit participants enrolling at all ranges of income.
- Creation of a one-time $5,000 homeownership incentive.

COST EFFECTIVENESS

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

- Over 20,055 distinct applicants.
- Over 163,485 applications.
- Includes site-based waitlists.

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CHA DEPARTMENT ACCOMPLISHMENTS

OPERATIONS

REORGANIZATION

Efforts to restructure the Operations department began in late 2018 and successfully concluded in mid-2019, unofficially marked by the successful hiring of a fourth District Manager. The newly added District Managers have provided crucial administrative support to the Director and Deputy Director of Operations while supervising the Property Managers that are in their respective districts. The Manager's Aide position was eliminated with all Aides being promoted to Assistant Housing Managers, and the Area Maintenance Supervisor position was eliminated. In 2019, the department saw a total of 35 internal promotions.

PROPERTY MANAGEMENT AT THE YWCA

The CHA was awarded a contract from the Young Women's Christian Association of Cambridge in March 2019 for property management services. Ops now fills vacancy at and maintains the building infrastructure for the YWCA's Tanner Residence, a 103 SRO unit building for women in need of supportive housing where they can live and grow.

STAFF TRAININGS

Operations' leadership remains committed to providing staff the trainings they need to succeed. In the 4th quarter, the department logged a total of 1,500 training hours over 10 trainings covering a variety of topics. The two longest trainings were a 5-part overview of the newly created 92-page Resource Guide with Edgemere Consulting, and a 3-day Tax Credit training conducted by US Housing Consultants.

RELOCATION

Relocation coordinators in the Operations department successfully facilitated 228 moves for residents moving out or back-in to a CHA property as efforts to modernize our properties continue. The relocation team added two new members in 2019.

RUSSEL APARTMENTS LEASED UP

Russell Apartments completed modernization in October 2019. Russell, a building for elderly and disabled tenants in North Cambridge, was successfully leased by the Operations department. It was originally built in 1984 and is comprised of 52 one-bedroom apartments.

SAFETY AND SECURITY

CHA's Public Safety Administrator continued to coordinate monthly meetings with the Cambridge Police Department (CPD) and property management staff to provide timely information regarding crime and safety. It is the goal of the Public Safety Administrator to enter into partnerships not only with the Police

and residents of all CHA developments, but also city agencies, public service providers and the business community to promote a better quality of life for all CHA residents. In FY19, the public administrator completed the following:

- Conducted 24 lighting surveys throughout various developments
- Attended quarterly meetings with the Local Emergency Planning Committee (LEPC), and the Cambridge Police Department Stakeholders meeting
- Continue meetings with CABHART, a domestic violence support network, as requested by CABHART
- Conducted 12 resident neighborhood meetings regarding safety and security concerns across the city
- Participated in the City Council's Safe Streets series of roundtable meetings

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 & Pathways to Permanent Housing programs, 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.

PAYMENT STANDARDS -TRANSITION TO SMALL AREA FAIR MARKET RENT (SAFMR) METHODOLOGY

Each year HUD publishes the fair market rents (FMRs) for each market area in the United States. CHA must adopt a payment standard schedule that establishes voucher payment standard amounts for each unit size. In the past CHA had used a single payment standard for each bedroom size throughout all areas of Cambridge. In July of 2019, CHA transitioned to a methodology of establishing its payment standards based on zip codes (known as "Small Area Fair Market Rents" / SAFMRs). CHA believes that this change to zip-code based payment standards, in addition to a significant overall increase in the payment standards from 2018, has and will continue to improve the ability of voucher holders to locate units in which they can utilize their voucher.

CHA has already seen an increase in voucher success rate, in large part we believe due to the increase in the payment standards. In a recent issuance of vouchers to non-elderly disabled households, 68% of households were successful in finding and leasing a unit with their voucher before the voucher expiration date, compared to a prior success rate of 44%. CHA is hopeful that continuing to utilize SAFMRs both in and outside of Cambridge will not only preserve existing leased units in areas where the market is steadily rising, but also open up areas of the City and region in which voucher holders have traditionally had difficulty finding units.

FSS+ GRADUATIONS

In October 2012 CHA launched a new economic mobility program, known as the Family Savings and Stability Plus (FSS+) Program, which is modeled on HUD's Family Self-Sufficiency Program (FSS). CHA partners with Compass Working Capital, a nonprofit financial services organization, to administer the program and provide financial counseling and other related services and coaching. FSS+ is a five-year program, and throughout 2018 many of the first participants graduated from the program. In November 2018 CHA and Compass hosted a graduation ceremony to celebrate the first class of graduates. Eighty-six program graduates were honored, and together they saved over $460,000 throughout the course of the program. Many were able to increase their credit scores, repay debt, pursue higher education, increase their earnings, and some were able to become homeowners.

EXPIRING USE/PRESERVATION

In September 2019 CHA was awarded an additional 136 vouchers for the purpose of preserving existing tenancies at 808-812 Memorial Drive in Cambridge, due to the pre-payment of the Section 236 mortgage at the site. In addition to screening the existing tenants for Enhanced Vouchers CHA used its MTW authority to convert these vouchers (with tenant consent) to project-based vouchers in order to preserve the affordability of the development in the long-term. 808-812 Memorial Drive is a 300-unit apartment building with an affordability requirement for 212 of the units. Seventy-six of these units were preserved under a PBV contract with CHA in 2015 (utilizing CHA's Expiring Use Preservation Initiative), upon expiration of a Rent Supplement contract. The addition of the 136 new vouchers will preserve ensure that all 212 units remain affordable in the long-term, both for existing tenants and new tenants on turnover.

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

Moved to a new database server

CHA replaced its cloud-based database server with system built on new systems. This update improved the security and reliability of our mission-critical housing management system.

Computer refresh for over 75% of the organization

Some computers can continue working for nearly a decade but keeping them in production that long is rarely a good idea. Computer performance deteriorates over time such that the optimal production life is generally around 3 to 4 years. We replaced nearly all machines that hit the four-year mark in 2019, with several more upgrades scheduled for 2020. Such regular computer refreshes ensure that staff are not hindered by underperforming hardware.

Cybersecurity

Most cyber-attacks begin with email and involve either phishing for login credentials or delivering malware via a malicious email link or attachment. There is no "silver bullet" fix and no organization is immune from cyber threats. CHA takes cyber security seriously and regularly adapts to the constantly changing threat landscape.

CHA in 2019 implemented new layers of security services aimed at protecting email.

Microsoft Office 365 Advanced Threat Protection (ATP)

ATP works at the cloud-level to scan all email attachments for malware before delivering them to the end user. Similarly, ATP scans links to limit user exposure to phishing attacks on malicious sites and malware delivered via infected websites.

Conditional Access Policies

Also to protect email, CHA has implemented conditional access policies. These policies prevent access to email accounts from a configurable list of geographies either known as sources of hacking attempts, or outside locations that CHA users are likely to visit.

These new protections complement measures already-in-place, which include recurring cybersecurity training, two-factor authentication and anti-malware defenses both on the network and on end-user's computers.

Moved File and Printer Servicers In-House

To improve performance and reduce cloud hosting fees, IT moved CHA's file server and printer server from the cloud to on premises.

Implemented Partner Portal

In conjunction with Leased Housing, implemented a partner portal which allows landlords self-service access to information related to their properties. This should over time reduce the burden on CHA staff around landlord communications. To keep our technology infrastructure up-to-date, planning began to consolidate several older servers onto fewer newer servers. This will streamline IT services and allow CHA to take advantage of speed and other improvements that newer servers provide.

The IT department continued to manage data conversions for developments transitioning this year from low income public housing through RAD/Section 18 Disposition.

LEGAL

National Policy Direction

CHA remains active in the coalition of 39 MTW agencies that has been coordinating on common issues since the negotiations with HUD over the terms of the extension of the MTW Agreement in 2015, as well as HUD's effort to unilaterally amend the Annual Contributions Contract applicable to all housing authorities. CHA will continue to participate in commentary and discussion to ensure that the MTW Agreement with HUD is not compromised by these HUD initiatives.

Immigration

CHA continues to play a major role in coordinating other agencies around immigration issues and its potential impact on both agencies and the clients they serve. Now that Department of Homeland Security has announced that "public charge" rule will go into effect on February 24, 2020, CHA continues engage in internal staff training about the impact on applicant and participants in our programs.

State Policies

CHA continued to advocate for adoption of public housing reform measures that would bring the state enabling act. M.G.L. c.121B, into conformity with current ways of financing and operating our housing. In addition, CHA participates on the Governor's Council to Address Sexual Assault and Domestic Violence to share the lessons learned over the course of our partnership with Transition House with other housing providers across the Commonwealth.

LEP Update

CHA worked collaboratively this year with the City of Cambridge to analyze data language data collected. Primary languages in households with incomes less than $40,000 in Cambridge are as follows:

1) Spanish (10.4%)

2) French or Haitian Creole (6.5%)

3) Amharic- (3.5%)

CHA conducted and will continue to conduct training on our obligations under the current LEP policy, as well as use of language assistance resources (phone translation, document translation, and in-person translators). We have explored the use of Google Translate as an additional tool that may enhance our ability to provide written communication in the appropriate language to residents and participants.

POLICY AND TECHNOLOGY LAB EAST

INTERNS

In summer 2019, the PTLab worked with an Urban Planning Graduate student with MIT to produce the Ladder to Opportunity activity for the 2020 MTW Plan. This included conducting interviews with various service providers and speaking with other MTW agencies about their sponsor-based initiatives. This project has helped to carve out a path for sponsor-based voucher participants. Earlier in the year, the PTLab, hosted another MIT graduate student to work

on creating a homeownership activity. The activity that resulted was not approved in the 2020 Plan but CHA anticipates moving forward with this project using non-federal funds.

HUMAN RESOURCES AND SECTION 3 HIRES

In the calendar year 2019, there were 8 Section-3 hires and 5 new tenant coordinator hires at CHA.

In FY19 CHA completed a restructuring of our Operations department adding the critical position of District Housing Manager to provide day-to-day operational support and supervision to the Cambridge Housing Authority's portfolio of multi-family properties. Agency-wide there were internal 39 promotions providing current CHA employees with career advancement opportunities. The Human Resources team continues to promote an inclusive culture that values respect and inclusion, and that reflects the diversity of the communities in and around Cambridge that we serve.

RESIDENT SERVICES

POST-SECONDARY SUCCESS INITIATIVE - COLLEGE MATCHED SAVINGS PROGRAM

In 2018, the Resident Services department leveraged key funds to add the third and final component to the Work Force program's "Post-Secondary Success Initiative," launched in 2015. With these funds, the initiative became fully operational in 2018, providing coaching for persistence and career development support to roughly 160 Work Force seniors and graduates completing their first two years of college.

Central to the CHA's efforts to break the cycle of intergenerational poverty is the Work Force, our comprehensive, after-school educational enrichment, college prep, and work-readiness program which annually serves over 280 teens, aged 12 through 20, residing in Cambridge public housing and Section 8 voucher programs. The program operates at four different sites in the city, including three of the CHA's largest housing developments, and at Cambridge Rindge and Latin High School.

Uniquely comprehensive in both its manner and duration of support, the program provides participants with sustained networks of learning and support over a developmentally significant seven-year span: from the eighth grade through their first two years of post-secondary education. The Work Force focuses on building students' strengths to promote achievement at home, at school, and at work. By building a broad nexus of developmental support, the program has a demonstrated record of helping teens from low-income backgrounds hone the wide range of competencies necessary for long-term success: over 90% annually attend college, and nearly two-thirds of graduates no longer live in subsidized housing six years after completing the program.

Significant donations in 2018 from the Herb and Maxine Jacobs Foundation, the Boston Foundation's Skillworks initiative, and Google supported key aspects of the Work Force's "Post-Secondary Success Initiative" and the accompanying College Matched Savings program. The Post-Secondary Success Initiative provides coaching for persistence to college-going graduates, and a unique career development trajectory as students complete their junior and senior years of college. The latter is provided by a Career Development Specialist, a new position created in 2018 and paid for in part by the Jacobs Foundation.

In addition, the Work Force is the only educational program in the city to offer under-resourced students a College Matched Savings program, providing

financial education training and a unique savings methodology that offers a 1:1 match of up to $1500 saved by participants for freshman-year, college related expenses. These innovations, along with the addition of an Alumni Coach two years ago, work together to help our low-income participants secure post-secondary degrees within five years, and to position them for long-term economic mobility. We are pleased with the initial results: close to 80% of the Class of 2016 have completed their first two years of college in good standing, and enrolled for their junior year; and nearly 90% of the Class of 2017 successfully moved on to semester three.

These new funds also supported the technological upgrade of the agency's 119 Windsor St. Community Computer Lab, one of several across the city maintained by the Resident Services department. The Windsor St. lab supports 25 computer stations, and is used predominantly by the 50 Work Force students who attend the program site on a weekly basis, as well as annual participants of the This Way Ahead program, our job training and retail internship program operated in partnership with Gap, Inc. Opened in 1997, the lab has also been traditionally used by outside partners. The upgrade to the lab allows for greater programmatic flexibility in terms of providing a greater range of computing configurations for Work Force and our program partners.

"BRIGHTER FUTURES" CAMPAIGN

For over 30 years, the CHA has been transforming lives with innovative educational enrichment and asset building programs that help our residents to break the cycle of intergenerational poverty and to reach their personal, educational, and economic potential. We remain committed to ensuring that proven programs such the Work Force and This Way Ahead programs continue to operate successfully and to benefit the Cambridge community.

While the agency's Resident Services department consistently seeks financial support from outside funders to support its social service work, roughly half of the funding for the department currently is provided by the agency's operating budget. Given steady reductions in federal funding for such public housing initiatives, it is increasingly difficult for the CHA to make up the difference and maintain these impactful programs.

To responsibly address this budget shortfall, the Resident Services department formally launched the "Brighter Futures: People, Place, Potential" campaign in 2018. The goal of the campaign is to raise additional dollars to protect our nationally-recognized educational support programs, our long-running service partnerships with nearly 20 city agencies, institutions, and businesses, and our tradition of innovation.

Over the course of 2018, the department brought in $220,000 in new funding from local businesses, foundations, and individual donors (in addition to the nearly $700,000 raised annually from ongoing funding relationships). While we consider this a strong start, over the next year, we will renew our efforts to raise additional money from diverse sources and to build on the many funding and donor relationships we developed during our first full year of the campaign

THIS WAY AHEAD

The 2018 cohort of This Way Ahead, our rigorous year-long customer service, work-readiness, and retail internship program for low-income youth from 16 to 24 years of age, achieved new enrollment and internships levels. Administered in partnership with Gap, Inc., the CHA's This Way Ahead program is now in its seventh year of operation, and has served as a model for other TWA initiatives currently being operated in major urban centers across the country.

The program, as currently configured, is comprised of three components. The first, twelve weeks of paid customer service and job training workshops offered twice weekly, are run by CHA's TWA Coordinators with select involvement from Gap, Old Navy, and Banana Republic store managers in the greater Boston area. This year, 130 participants were enrolled, and 104 successfully completed the stringent requirements to be declared internship-eligible. Those

104 participants interviewed and competed for 70 paid summer internships, the second component of the program, exceeding the 2018 regional goal of 65 set by Gap.

These internships provide opportunities for students to experience all aspects of working within a retail environment, with their performance potential leading to permanent or seasonal part-time jobs. Of the 70 students selected for internships, a record 64 successfully completed all of the requirements, with 54 (nearly 85%) receiving offers for permanent or seasonal part-time jobs.

At the completion of the internship phase, TWA participants benefit from several months of case management support, during which time students who have completed the program receive additional job training workshops, as well as networking and career development support.

PLANNING AND DEVELOPMENT

CHA's Planning and Development Department spent over $44 million in renovation work impacting 974 units of housing at twelve different sites, in the planning stages of work totaling over $400 million at six other sites impacting 639 units of housing, and $542,560 in smaller construction projects including boiler replacements and masonry restoration.

In 2019, Cambridge Housing Authority completed construction on Russell Apartments; made final payments on two other large scale projects; Manning Apartments and Jefferson Park Apartments; and began work on three other renovation projects with total construction costs exceeding $130 million: Garfield Apartments, St. Paul's Residences, and Millers River. Together, these six projects added or will add one hundred eighteen (118) new units to the Cambridge Housing Authority portfolio and significantly enhance the quality of existing apartments. Millers River is a three-year project, expected to conclude in 2021, while both Garfield Apartments and St. Paul's are expected to be complete in 2020.

CHA continues to convert its remaining units from the public housing program using both the RAD program and the Section 18 disposition process. In 2019, CHA converted an additional 331 federal public housing units to the Section 8 platform bring the overall total of units converted to 2,226 units or 92% of CHA's federal public housing portfolio. Additionally, HUD approved in 2019 CHA's disposition applications for its scattered site portfolio under Section 18 of the United States Housing Act (USHA) of 1937. This means that CHA will be able to obtain Tenant Protection Vouchers for these properties, gaining an important source of funding to maintain these affordable apartments.

CHA's disposition application for Scattered Site Properties was approved in early December 2019. Additional disposition applications for 116 Norfolk and Harry S. Truman Apartments which were submitted in late 2018 and early 2019 are still under review by HUD's Special Application Center. CHA has near-term plans to renovate Truman Apartments, aiming to begin construction in January 2021.

In December 2019, CHA closed on the financing for Roosevelt Towers Low-Rise, 112 units of housing in four three-story buildings on the Roosevelt Towers site. This financial closing will enable CHA to begin construction on the Low-Rise buildings in early 2020. The Planning and Development department also completed substantial work on the financing for 78-80 Porter Road and Burns Apartments, with the financing closing for those two developments scheduled to occur in January and February 2020, followed shortly by the start of construction respectively.

CONSTRUCTION PROJECTS

Millers River – Total Construction Contract of $109 million; $26.7 million spent in 2019

Major renovations began at Millers River in January 2019. Construction at this 297-unit building for low-income seniors and people with disabilities includes the replacement of the heating systems, replacement of the waste and water piping in the buildings, significant upgrades to the electrical equipment, replacement of the roof on the high rise building, conversion of all studio apartments to one-bedroom apartments, complete renovation of all kitchens and bathrooms, insertion of voice and cable wiring in all living spaces and bedrooms in units, and construction of a new community center.

The Millers River construction process is expected to last three years, concluding in 2021. The renovations will add five additional deeply affordable units to the CHA portfolio. In 2019, $26.7 million of the $109 million construction was completed.

Russell Apartments – Total Construction Contract of $14.4 million; $3.6 million spent in 2019

Besides Millers River, Cambridge Housing Authority led three other construction projects in 2019. Construction concluded on Russell Apartments in Spring 2019. The $14.4 million construction contract at Russell was finalized in November 2017. After receiving approval from HUD for disposition in October 2017, 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.

Construction at the site began in March 2018. All residents were relocated for the duration of this work, as was the North Cambridge Senior Center which occupies space on the first floor of the building. The comprehensive modernization of this 51-unit elderly and disabled development in the North Cambridge neighborhood comprised 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 included the conversion of an under-utilized lounge space into a new residential unit, the 52nd-unit at the development. The project was 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.

Garfield Street Apartments – Total Construction Contract of $2.3M; $2.0 million spent in 2019

Construction began in April 2019 for Garfield Street Apartments, an eight-unit building in the Porter Square area. Improvements at Garfield Street Apartments include new windows and roof, siding and heating upgrades, new kitchen and bathrooms, upgraded ADA unit, and improved parking lot, sidewalks, and plantings. Garfield Apartments is expected to be completed in February 2020, with $2.1 million of the $2.3 million in construction already completed in 2019. Six of the eight Garfield units were converted to Section 8 PBVs through the RAD program with the remaining two units converted to Section 8 after receiving tenant protection vouchers after Section 18 approval. The project is being funded directly by the CHA.

St. Paul's Residences – Total Construction Contract of $5.6M; $3.3 million spent in 2019

St. Paul's is located in Harvard Square, and is part of the area's historic district. Construction has been underway since March 2019 and will result in a new elevator, new ventilation system, an upgrade of the heating system, installation of new windows, comprehensive modernization of the bathrooms, and the addition of four more SRO units. The additional four units will bring the site to a total of 22 SRO units, one two-bedroom unit, and one three-bedroom unit. Fifteen of the twenty St. Paul's units were converted to Section 8 PBVs through the RAD program with the remaining five units converted to Section 8 after receiving tenant protection vouchers after Section 18 approval. The four new units will be supported through the use of CHA's PBVs. The project is being

funded directly by the CHA.

Manning Apartments Revitalization and New Construction of Jefferson Park Apartments

CHA also completed close out activites for two consutrction projects which reached substantial completion in 2018 - Manning Apartments and Jefferson Park Apartments. Upon completion of the close-out activities including required documents, warranties, and certifications, final payments of approximately $3.8 million and $4.2 million respectively were made on each project in 2019. The final construction costs for the projects were:

Manning Apartments Total Construction Cost: $65,990,119

Jefferson Park Apartments Total Construction Cost: $53,023,673

Major Construction in 2019

Site	Units After Construction	2019 Expenditure	Status
Manning Apartments	205	$3,819,264	Completed 2018; Close-out in 2019
Jefferson Park Apartments	104	$4,175.644	Completed 2018; Close-out in 2019
Russell Apartments	52	$6,626,985	Completed in March 2018.
Millers River	300		To be completed 2021
Garfield Street Apartments	8	$2,017,544	To be completed early 2020
St. Paul's	24	$3,286,022	To be completed 2020
Total	693		

SMALLER PROJECTS

The Planning and Development Department also becomes involved in smaller projects in the portfolio. In 2019, CHA concluded miscellaneous upgrades on the Putnam Gardens community building, and a boiler replacement project for Aberdeen, Hammond, and Woodbridge. The CHA also began work on a masonry restoration for Lancaster Street, expected to conclude in late January 2020, and undertook some pre-construction services at Burns Apartments. Finally, the CHA began work on a camera installation at Jefferson Park State as well as a fire pump replacement at John F. Kennedy Apartments.

Project Name	Expenditures in 2019
Putnam Gardens Community Building Upgrades	$265,146.00
Aberdeen, Hammond, and Woodbridge Boiler Replacement Project	$237,329.94
Burns Revitalization Pre-Construction Expenditures	$234.385.00
Jefferson Park State Camera Installation	$37,950.00
JFK Fire Pump Replacement	$1,900.00
Lancaster Street – Masonry Restoration	$0.00
Total	$542,560.33

SECTION 18 DISPOSITION APPROVALS

Cambridge Housing Authority received approval in 2019 for the disposition of its scattered site portfolio. CHA's scattered site portfolio. Scattered site units tend to be more expensive to manage than units in larger buildings, because property managers must spend time travelling between these spread-out properties and because materials for repairs cannot be ordered in bulk. The Tenant Protection Vouchers received through this disposition will help preserve these deeply affordable units.

CHA has two more disposition applications awaiting HUD approval: Truman Apartments and 116 Norfolk. Truman Apartments is a 59-unit building for seniors and people with disabilities. It was built in 1969, and the Tenant Protection Vouchers CHA would gain from the Section 18 disposition would help fund renovations set to begin in January 2021.

116 Norfolk is a 37-unit SRO building originally constructed in 1920. Though beautiful and located on a spacious lot, the building needs substantial renovations. The CHA does not have a start date for renovations to this site. However, CHA would like to begin improvements to this site in the next few years, and the additional funding from Tenant Protection Vouchers gained through a Section 18 disposition would make the renovations more feasible.

RAD and Section 18 Dispositions in 2019

Property	Type of Conversion	Units	Date of Disposition	Funded Rehab	Comment
UDIC	RAD	26	07/25/2019	NA	Project did not require any initial rehab
Cambridgeport Commons	RAD	10	05/31/2019	NA	Project did not require any initial rehab
Garfield Street	RAD/ Sec 18	8	09/30/2019	$2.4 million	Financial closing complete and renovations underway
Jefferson Park	Sec 18	175	10/25/2019	NA	Financing plans still being developed in accordance with disposition approval.
Roosevelt Towers	Sec 18	112	12/31/2019	$33.3 million	Financial closing complete and renovations underway
Total		331		$35.7 million	

In total, as of December 31, 2019, CHA has converted 2,226 of its federal public housing units, or 92% of its total federal public housing portfolio.

One additional blended RAD and disposition conversion, St. Paul's Residence, is anticipated for the first quarter of 2020. The Section 18 disposition of the scattered site portfolio is projected for the second quarter of 2020.

DESIGN AND FINANCING OF OTHER RENOVATIONS

Projects Being Financed in 2019 with a 2020 Construction Start

In addition to the Section 18 disposition applications, the Planning and Development department has been pursuing other sources of funding for upcoming renovations. In 2019, the CHA received allocations of private activity bonds allowing three proceeds to proceed through the planning and design phase towards a construction start of early 2020 as shown below.

Private-activity bonds allocated in 2019

Property	Units	Private Activity Bonds	Construction Cost
Burns Apartments	198	$45 million	$67,885,112
Roosevelt Towers Low-Rise	112	$30.5 million	$33,255,814
78-80 Porter Road	26	$8.1 million	$11,849,000
Total	336	$83.6 million	$112,989,926

Roosevelt Towers - The first of these three projects, Roosevelt Towers, had its financial closing in late December 2019. The overall transaction totaled $59.1 million, allowing the CHA to proceed with over $33 million in much needed rehabilitation at the property. Renovations to these 112 units in four three-story buildings will include roof replacement, creation of a new boiler room, installation of a new ventilation system, masonry repairs, and unit kitchen and bathroom upgrades. This project, which begins construction in early January 2020, was financed through a combination of 4% Low Income **Housing Tax Credits and private activity bonds.**

Two additional financial closings, for 78-80 Porter Road and for Burns Apartments, are expected to follow in January 2020. Planning and Development staff worked with investors and lenders on the financing of these projects and with residents on the design process for these sites throughout 2019. 78-80 Porter Road is a 26-unit building in Porter Square, while Burns Apartments is a 198-unit site with two buildings for elderly and/or disabled residents. More specific information on each of the projects is below.

78-80 Porter Road - Extensive renovations are planned at Porter Road totaling just under $11.9 million, or approximately $450,000 per unit. Work includes the complete repointing of the building's masonry as well as replacement of rusting lintels. A new roof will be installed along with new windows to ensure a weather tight structure. Interior improvements include full system upgrades of the electrical, plumbing and ventilation systems, installation of a fire sprinkler system and new fire alarm panel, and complete refurbishment of kitchens and bathrooms. Two new handicapped accessible units will also be created as part of the on-going work.

Burns Apartments - CHA is proceeding with a construction scope totaling $68 million that is similar in scale as the Millers River project. Renovation work at Burns includes: replacement of the waste and water piping in the buildings, installation of a fire sprinkler system and upgrade to the fire alarm service, significant upgrades to the electrical equipment, installation of central air condition, conversion of all studio apartments to one-bedroom apartments,

complete renovation of all kitchens and bathrooms, insertion of voice and cable wiring in all living spaces and bedrooms in units, and reconfiguration of the building's existing community space. Work is scheduled to start in February 2020, and take approximately 2 years to complete.

Possible Projects Being Financed in 2020 with a 2021 Construction Start

In 2019, CHA's Planning and Development Department also prepared Official Action Status applications to MassDevelopment for 2020 private activity bonds for two properties, Truman Apartments and Putnam School Apartments. Truman Apartments is a 59-unit building built in 1969 and Putnam School Apartments is a 33-unit building built in 1890. Both properties are home to residents who are elderly and/or have disabilities, and both properties are in need of substantial renovations. If private activity bonds are issued in 2020 for these two properties, then construction would begin in early 2021. In December 2019, CHA issued an RFP for architectural and engineering services in designing these renovations.

Potential private-activity bonds allocated to be in 2020

Property	Units	Private Activity Bonds	Est. Construction Cost
Truman Apartments	59	$18.7 million	$17.5M to $19.5M
Putnam School	33	$10.3 million	$9.7M to 10.7M
Total	92	$29 million	$27.2M to $30.2M

In addition to those two projects, the CHA continued efforts to secure funding on three larger scale projects including:

Jefferson Park Federal. CHA is working with the architectural firm, BWA Architecture (formerly 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. As part of its early design work, 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. Further, there is an opportunity to increase density at the site allowing the expansion of affordable units. 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, and is hopeful that a commitment will be received in early 2020 to allow for a 2021 financial closing date. In addition to continuing to work on schematic designs, CHA commissioned BWA Architecture to complete a net zero study to determine the potential feasibility of moving the project in that direction. BWA submitted that study in December 2019 which is currently under review.

Corcoran Park - CHA hired Studio G Architects in March 2018 to oversee the design work at Corcoran Park, a 153-unit family development in the Strawberry Hill neighborhood. As of December 2019, Studio G has completed work on a Feasibility Report with preliminary design and scope options for the site. There may be possibility to increase units at this site. 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.

Roosevelt Towers Mid-Rise - CHA is working to use the significant rent increase on this property effective March 1, 2018 as the catalyst to fund the much needed renovations of the 75-unit mid-rise building at Roosevelt Towers. The last major renovations at the property occurred in 1980, approximately 40 years ago. The property's capital needs assessment has identified substantial renovation needs as well as the opportunity to add approximately 60 units through an addition to the back of the building. Efforts to secure the needed private activity bonds from the Commonwealth of Massachusetts is on-going. CHA needs these bonds before it can finalize a construction scope of work and move forward with its financing and construction.

Smaller Project

Renovation of Special Needs Housing. 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. The CHA applied for and received a grant from DHCD in 2018 under its Moving to Independence Program to complete needed modernization work at three properties. During 2019, CHA hired an architectural firm to complete design work. The firm has completed a schematic design report which is under final review by DHCD and CHA. The planned construction to be contract to be procured in 2020 include accessibility and energy efficiency improvements, restoration of interior finishes to a pleasant and maintainable level, and exterior envelop improvements to prolong the lives of the building. In addition to the modernization work, the CHA will be funding a capital reserve and be receiving an increase in the lease rents for the three facilities, to ensure its ability to maintain sufficient operating and capital reserves to meet the needs of the properties.

HOUSING AND HEALTH

In the first week of September 2019, the Planning & Development department held kick-off events for a health survey distributed to residents of Truman Apartments, Millers River, Roosevelt Towers Mid-Rise, and Putnam School Apartments. This health survey, created by LeadingAge, is intended to help CHA learn more about the health needs of residents in order to create future programming and partnerships to improve health outcomes. Survey results were compiled in December 2019, and will be used to influence future physical design decisions by the Planning & Development department.

NEW DEVELOPMENT OPPORTUNITIES

As part of on-going planning efforts, the 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, the CHA has been working with a development team to create a master plan for the 1.6 acre site. The team has develop 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. This site could be an exciting candidate for a housing and health partnership.

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 determined that an interim strategy would not sufficiently improve conditions and has vacated approximately 32% of the units. BWA Architecture, 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 approximately 100 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

ENERGY AND SUSTAINABILITY

The largest accomplishment this year is CHA's receipt of a Goal Achiever award from the Department of Energy's Better Building Challenge. The program goal was to achieve a 20% reduction in energy intensity (Kbtu/square foot) across the building portfolio (2.4M square feet) within ten years; instead CHA achieved a 23% energy savings reduction within three years. CHA also received a Leadership Award from Department of Energy for success in energy data and building performance tracking.

CHA has been building the foundation for this success for over a decade, tackling energy inefficiencies and improving unhealthy buildings. In total, since 2010 CHA has expended over $300 million to renovate 1,312 units of housing stock, benefiting comfort and healthy living while reducing our energy intensity (kbtu/sq ft) by over 50% and water use by 30%.

CHA follows Enterprise Green Communities (ECG) criteria for all substantial modernization work which assures me meet the goal of improving living conditions for our residents and supporting the effort to be good stewards of affordable housing long into the future. Successful ECG certification mandates fresh air ventilation, use of low/no VOC products in construction, mold prevention, and air sealing to reduce drafts and improve apartment air quality. CHA has additionally committed to adding air conditioning to our high rise building stock to improve resident comfort and health.

As of the close of 2019, we look forward to bringing two newly modernized developments 12 units at Garfield Street and 22 units at St Paul's back online. The St Paul's development is now primarily all electric with heating and air conditioning provided by air source mini-splits. In support of climate change goals and the City of Cambridge plan for Net Zero by 2050, CHA is reviewing the feasibility of electrification on a case by case by case basis as we approach each project.

CHA continues to develop our own on source generation both by solar arrays and cogeneration plants. At the close of 2019 we are awaiting interconnection of a 44 kW solar array, bringing our onsite generation to over 15% of the energy used across our portfolio, with additional onsite generation planned for 2020.

VOLUNTARY COMPLIANCE AGREEMENT

CHA continues to work towards fulfilling its Voluntary Compliance Agreement with HUD's Office of Fair Housing and Equal Opportunity. Thirty-seven (37) wheelchair accessible units in its Public Housing portfolio were completed as of July 2019. Construction of the final five (5) required units will be complete in 2021 with the completion of the Revitalization of Millers River, which is now underway. Millers River will add a total of 13 new ADA units, eight more than the five required. Construction at the 297-unit site began in January 2019 and will take close to three years, with the handicapped accessible units expected to be completed by mid-2021.

In addition to the units underway at Millers River, newly started work at two additional CHA sites will add 12 new ADA units, bringing the CHA's new units to 62 or twenty higher than required by the Voluntary Compliance Agreement. The locations of these new units are: 2 units at 78-80 Porter Road which will be completed by April 2021, and 10 units at Burns Apartments which will be completed by January 2022.

VCA COMPLIANCE – SUMMARY

PLANNED UNITS	COMPLETED UNITS	PLANNED DATE	COMPLETED DATE	STATUS
2	2		03 / 2008	Units completed at Lyndon B. Johnson Apartments
5	5		12 / 2008	Units completed at Frank J. Manning Apartments
5	5		05 / 2010	Units completed at Frank J. Manning Apartments
1	1		03 / 2010	Unit completed at Willow Street Homes
3	3		11 / 2011	Units completed at Jackson Gardens
1	1		02 / 2012	Unit completed at Lyndon B. Johnson Apartments
4	4		03 / 2012	Units completed at Lyndon B. Johnson Apartments
4	4		08 / 2013	Units completed at Lincoln Way
2	2		12 / 2015	Units completed at 5 Temple Place[1]
8	8		07 / 2018	Units completed at Jefferson Park
2	2		07 / 2018	Units completed at Manning Apartments
5		06/2021		Units planned for Millers River Apartments
42	**37**			**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.

FY18 RESIDENT PROGRAMS + SERVICES

PROGRAM	HHS SERVED	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	250 Families	20 trainings/event completed annually.	175 Families and growing
Pathways to Family Success	16 Families	Literacy program for families with ESL children K-3 with wraparound services for parents.	15-18 Families
YOUTH			
DREAM Mentoring	10 Youth	10 youth paired with Harvard mentors for academic year.	15 Youth school yr 30 Youth summer
Work Force	200 Youth	Addition of new grant-funded Alumni Coach position to support alumni.	200 Youth
Work Force College Savings Program	120 banked	$100,000 in annual funding from foundation with new savings ceiling of $1,500 per student.	200 Youth
Tutoring Plus, Inc	50 Youth		50 Youth
This Way Ahead - Gap, Inc.	140 Youth	16 weeks for training workshops. 70 internships.	140 Youth - 70 summer internships
Big Brother Big Sister Program	100 Youth	Goal of 125 matches.	110+ Youth

PROGRAM	HHS SERVED	FY HIGHLIGHTS AND UPDATES	OPTIMAL CAPACITY (YEAR)
Youthbuild	4 Youth	Earn GED while building affordable housing	4-6 Youth
ADULT			
Bridge-to-College Program	4 Adults	Majority of graduates enroll at Bunker Hill Community College.	10 Adults
Community Computer Centers	200 Youth 180 Adults		200 Youth 180 Adults
Cambridge Employment Program	95 Adults	30 job placements in an academic year.	95 Adults
Jefferson Park Gateways Learning Program	141 Adults	6 classes/academic year and 3 classes/summer	140 Adults
Just-A-Start Biomedical Careers	4 Adults	Academic year program that prepare participants for entry level positions.	8 Adults
Financial Stability and Savings (FSS+)/Rent-to-Save	192 HCV 321 RTS	See SS.2013.01- FSS activity in Approved MTW Activities section for more information.	200+ Adults
Pathways to Permanent Housing - Heading Home	24 Adults	See HC.2008.03B - Sponsor-Based Voucher Program in Approved MTW Activities section for more information.	45 Adults
Pathways to Permanent Housing - Transition House	3 Families	See HC.2008.03A - Sponsor-Based Voucher Program in Approved MTW Activities section for more information.	4 Families
AGING IN PLACE			
Elder Service Coordinators Services contracted through CASCAP, Inc.	640 Elderly Adults	Ongoing group activities involving Farmer's Market, healthy eating, emotional support, informational sessions, coffee hours, birthday parties, lunch outings and shopping trips. Available to any elderly non-PACE adult living in CHA unit.	1,035 Elderly Adults
PACE Elder Service Plan	36 Elderly Adults	Program includes 20 units at LBJ and 16 at Millers River.	36 Elderly Adults
TOTAL[3]	**504 Youth 1,270 Adults 676 Elderly**	* (Numbers Pending Budget Availability - Available in Final Draft)	

1. MTW Funds are inclusive of block grant commitments from previous years.
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.
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

	HUD Baseline	Vouchers Authorized or PH Units in Place on 12/31/2019	Total	HH Demo graphics	MTW Local Non Tradi-tional	MTW Family and Bedroom size	Notes
Public Housing Elderly/Disabled		153	134	134		134	Truman (66), 116 Norfolk St (38), Weaver and Linnaean (44), 5 Elderly Condos.
Public Housing Family		152	133	133		133	Roosevelt Towers (124), Scattered Sites and Condos (28).
RAD Elderly/Disabled		443	410	410	0	410	Manning Apartments (205), 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. SP?
RAD Family		847	812	812		812	Washington Elms (175), Newtowne Court (268), Putnam Gardens (122), Woodrow Wilson Court (68), Lincoln Way (53 RAD) Jackson Gardens (45) River Howard and Willow St (46 RAD), Cambridge Port Commos (10), Fairmont St (10), Garfield St (10), Saint Paul (2 RAD) 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		550	382	382		382	Millers River (299) Burns (199) and Russell (51).
Former Public Housing Family		430	368	368		368	Corcoran Park (153), Jackson Place Apartments Interim Holding LLC (173), and Jefferson Park Apartments (104)
MTW HARD UNITS	**854**	**2,575**	**2,239**				**87% occupancy.** Occupancy affected by RAD conversion and Section 18 Disposition.
MTW Tenant Based		1,794	4,035	4,035	0	4,035	All MTW Vouchers
MTW Project Based + Expiring Use		2,369					Count is exclusive 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(1602), Landfall (15).

	HUD Baseline	Vouchers Authorized or PH Units in Place on 12/31/2019	Total	HH Demo graphics	MTW Local Non Tradi-tional	MTW Family and Bedroom size	Notes
Sponsor-based/ Local Non-Traditional		141	141	0	141	0	This count uses 1:1 sponsor based voucher to household served ratio. In reality, these vouchers serve a greater ratio as detailed in the Sponsor-Based MTW Activity.
MTW VOUCHERS	**5,304**	**4,304**	**4,242**				**99% Utilization Rate.**
Federal Non-MTW		680	529	529	N/A	N/A	Voucher allocation includes Mainstream, VASH, DHVP/NED, Mod Rehab , and Shelter + Care.
ALL FEDERAL VOUCHERS		5,383	4,771	N/A	N/A	N/A	Does not include relocation or RAD/FPLI
ALL FEDERAL ASSISTED		**7,958**	**7,010**				**88% utilization. Includes hard units (PH, RAD, FPLI) + vouchers.**
State New Construction		110	102	102	N/A	N/A	Includes Roosevelt Towers (Mid-Rise) and Putnam School.
State and Local Vouchers		192	141	141	N/A	N/A	Voucher funding includes MRVP , AHVP, Shelter Care .
STATE AND LOCAL ASSISTED		**192**	**137**				**79% Utilization**
TOTAL ASSISTED		**8,150**	**7,147**				

HOUSEHOLD DEMOGRAPHICS

MTW HARD UNITS AND VOUCHERS
HOUSEHOLDS SERVED - DECEMBER 31, 2019

	HARD UNITS								MTW HCV HOUSEHOLDS		
	PUBLIC HOUSING FAMILY	PUBLIC HOUSING ELDERLY	RAD FAMILY	RAD ELDERLY	FORMER PUBLIC FAMILY	FORMER PUBLIC ELDERLY	TOTAL	PERCENT	HOUSE HOLDS	PERCENT	TOTAL
UNIT SIZE											
0 BR	0	42	0	62	0	241	345	15%	213	5%	558
1 BR	0	89	157	334	81	139	800	36%	1,781	44%	2,581
2 BR	87	3	341	13	137	2	583	26%	1,358	34%	1,941
3 BR	43	0	245	0	122	0	410	18%	575	14%	985
4+ BR	4	0	66	0	28	0	98	4%	108	3%	206
TOTAL HOUSEHOLDS	134	134	809	409	368	382	2,236	100%	4,035	100%	6,271
RACE											
American Indian	0	1	3	1	4	0	9	0%	14	0%	23
Asian	8	4	45	31	21	18	127	6%	477	12%	604
White	43	91	252	218	110	232	946	42%	1,817	45%	2,721
Black/African American	83	38	505	153	228	127	1,134	51%	1,716	43%	2,850
Native Hawaiian/Other Pacific	0	0	4	6	5	5	20	1%	3	0%	23
TOTAL HOUSEHOLDS	134	134	809	409	368	382	2,236	100%	4,035	100%	6,271
ETHNICITY											
Hispanic	22	8	133	36	46	33	278	12%	701	17%	979
Non-Hispanic	112	126	676	373	322	349	1,958	88%	3,326	83%	5,284
TOTAL HOUSEHOLDS	134	134	809	409	368	382	2,236	100%	4,035	100%	6,271
INCOME[2]											
At 30 AMI or below	62	112	459	355	206	333	1,527	68%	3,029	75%	4,556
Over 30 AMI – 50 AMI	31	18	183	42	100	34	408	18%	788	20%	1,196
Over 50 AMI – 60 AMI	10	3	55	8	21	6	103	5%	129	3%	232
Over 60 AMI – 80 AMI	11	1	34	2	19	7	74	3%	66	2%	140
Over 80 AMI	20	0	78	2	22	2	124	6%	23	1%	147
TOTAL HOUSEHOLDS	134	134	809	409	368	382	2,236	100%	4,035	100%	6,271
CAMBRIDGE RESIDENT											
Cambridge	134	134	809	409	368	382	2,236	100%	2,097	52%	4,333
Outside Cambridge	0	0	0	0	0	0	0	0%	1,938	48%	1,938
TOTAL HOUSEHOLDS	134	134	809	409	368	382	2,236	100%	4,035	100%	6,271

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, 2018

	NEW CONSTRUCTION		FEDERAL NON-MTW		STATE		
	HOUSEHOLDS	PERCENT	HOUSEHOLDS	PERCENT	HOUSEHOLDS	PERCENT	TOTAL
UNIT SIZE							
0 BR	10	10%	145	28%	64	47%	219
1 BR	78	79%	302	57%	34	25%	414
2 BR	11	11%	58	11%	18	13%	87
3 BR	0	0%	15	3%	16	12%	31
4+ BR	0	0%	7	1%	3	2%	10
TOTAL HOUSEHOLDS	99	100%	527	100%	135	100%	761
RACE							
American Indian	0	0%	8	2%	1	1%	9
Asian	5	5%	8	2%	4	3%	17
White	55	56%	311	59%	73	54%	439
Black/African American	38	38%	200	38%	57	42%	295
Native Hawaiian/Other Pacific	1	1%	0	0%	0	0%	1
TOTAL HOUSEHOLDS	99	100%	527	100%	135	100%	761
ETHNICITY							
Hispanic	13	13%	56	11%	18	13%	87
Non-Hispanic	86	87%	471	99%	117	87%	674
TOTAL HOUSEHOLDS	99	100%	527	100%	135	100%	761
INCOME[2]							
At 30 AMI or below	76	77%	466	88%	123	91%	665
Over 30 AMI – 50 AMI	14	14%	46	9%	8	6%	68
Over 50 AMI – 60 AMI	3	3%	8	2%	2	1%	13
Over 60 AMI – 80 AMI	4	4%	5	1%	0	0%	4
Over 80 AMI	2	2%	2	0%	2	1%	6
TOTAL HOUSEHOLDS	99	100%	527	100%	135	100%	761
CAMBRIDGE RESIDENT							
Cambridge	99	100%	259	49%	121	90%	479
Outside Cambridge	0	0%	268	51%	14	10%	282
TOTAL HOUSEHOLDS		100%	527	100%	135	100%	761

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

CHA HOUSING UNITS: YOUNGER DISABLED RESIDENT COMPOSITION –

	Units Available	Units Occupied	Younger Disabled Households	Percent of Units Available	Percent of Occupied Units
116 Norfolk Street	37	36	6	16.2%	16.7%
D.F Burns Apartments	139	137	14	10.1%	10.2%
Elderly Condos	5	5	0	0.0%	0.0%
H.S. Truman Apartments	57	57	12	21.1%	21.1%
J.F. Kennedy	44	44	6	13.6%	13.6%
Linnaean Street	20	20	3	15.0%	15.0%
L.B. Johnson Apartments	177	165	16	9.0%	9.6%
F.J. Manning Apartments	205	200	32	15.6%	16.0%
Millers River Apartments	209	182	25	12.0%	13.7%
Putnam School	27	27	3	11.1%	11.1%
R.C. Weaver Apartments	20	20	8	40.0%	40.0%
Roosevelt Midrise	77	72	25	32.47%	34.7%
L.J. Russell Apartments	52	52	7	13.5%	13.5%
GRAND TOTAL	**1,069**	**1,017**	**157**	**14.6%**	**15.4%**

WAITLIST INFORMATION

The following is a breakdown of CHA's waitlists. Under the Program column, CHA Units include public housing, RAD, and former public housing sites. Please note that an applicant may be eligible for multiple programs based on age and income. At fiscal year end, there were 20,055 distinct applicants that generated 163,485 applications or an average of over 8 applications per applicant.

CHA WAITLIST INFORMATION - DECEMBER 31, 2019

DISTINCT APPLICANTS	PROGRAM	DISTINCT APPLICANTS BY PROGRAM	UNIT TYPE	DISTINCT APPLICANTS BY UNIT TYPE	TOTAL APPLICATIONS
	CHA Units Elderly/Disabled	2,792	Elderly/Disabled	5,361	
	CHA Units Family	7,678	Family	21,392	
	HCV Elderly/Disabled	2,569	Single Room Occupancy (SRO)	1,195	
19,072	HCV Family	13,714			**163,485**
	Single Room Occupancy (SRO)	1,195			
	Total	27,948	Total	27,948	

CHA WAITLISTS BY - DISTINCT APPLICANTS IN EACH PROGRAM GROUP – BY RACE AND ETHNICITY – DECEMBER 31, 2019

	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	43	2%	243	8%	1,018	36%	31	1%	1,421	51%	35	1%	380	14%	2,403	86%	9	0%	2,792
CHA UNITS FAMILY	86	1%	437	6%	4,072	53%	114	1%	2,640	34%	328	4%	1,913	25%	5,498	72%	267	3%	7,678
HCV ELDERLY/DISABLED	54	2%	135	5%	1,028	40%	32	1%	1,297	50%	22	1%	408	16%	2,158	84%	3	0%	2,569
HCV FAMILY	208	2%	555	4%	8,038	59%	289	2%	4,491	33%	134	1%	3,452	25%	10,263	75%	2	0%	13,717
SINGLE ROOM OCCUPANCY (SRO)	16	1%	24	2%	667	56%	24	2%	436	36%	23	2%	204	17%	968	81%	23	2%	1,195
TOTAL	**407**	**1%**	**1,394**	**5%**	**14,823**	**53%**	**490**	**2%**	**10,285**	**37%**	**546**	**2%**	**6,357**	**23%**	**21,290**	**76%**	**304**	**1%**	**27,951**

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, 2019

	$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	275	10%	2,185	78%	243	9%	46	2%	24	1%	19	1%	2,792
CHA UNITS FAMILY	863	11%	5,204	68%	1,231	16%	178	2%	127	2%	75	1%	7,678
HCV ELDERLY/DISABLED	219	9%	2,123	83%	187	7%	24	1%	9	0%	7	0%	2,569
HCV FAMILY	996	7%	9,760	71%	2,588	19%	211	2%	110	1%	49	0%	13,714
SINGLE ROOM OCCUPANCY (SRO)	174	15%	816	68%	165	14%	18	2%	17	1%	5	1%	1,195
TOTAL	**2,527**	**9%**	**20,088**	**72%**	**4,414**	**16%**	**477**	**2%**	**287**	**1%**	**155**	**1%**	**27,948**

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 7-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, 2019

	FY12	FY13	FY14	FY15	FY16[1]	FY17	FY18	FY19
CHA FAMILY								
1 BR	569	420	399	390	316	284	1,396	2,014
2 BR	2,668	2,525	2,676	3,693	2,569	2,298	2,612	3,079
3 BR	1,244	1,372	1,379	1,785	1,214	1,199	1,625	1,886
4+ BR	224	272	278	249	213	208	591	699
SUBTOTAL	4,705	4,589	4,732	6,084	4,312	3,989	6,224	7,678
CHA ELDERLY/DISABLED								
Studio or 1 BR	2,357	2,541	2,980	2,787	2,151	1,410	2,178	2,572
2 BR	69	94	114	154	106	81	173	220
SUBTOTAL	2,426	2,635	3,094	2,921	2,045	1,491	2,351	2,792
HCV ELDERLY/DISABLED								
Studio or 1 BR						1,837	2,414	2,569
2 BR			N/A					
SUBTOTAL						1,837	2,414	2,569
HCV FAMILY								
Studio or 1 BR						5,982	7,546	8,081
2 BR						2,559	3,426	3,651
3 BR			N/A			979	1,390	1,558
4 BR						236	326	424
SUBTOTAL						9,756	12,724	13,714
SINGLE ROOM OCCUPANCY (SRO)								
SRO			N/A			1,817	2,488	
TOTAL	**10,897**	**11,265**	**11,483**	**10,422**	**9,208**	**18,890**	**27,948**	**27,948**

SOURCES + USES OF FUNDING

SOURCES AND USES: MTW FUNDS CY 2019

	Federal Public Housing	MTW Housing Choice Vouchers	Capital Fund	Total MTW Funds
Operating Receipts	$2,676,200			$2,676,200
Administrative Fees		$11,267,840		$11,267,840
Subsidy Earned	$8,326,472	$89,359,131	$2,716,198	$100,401,801
Total Sources	**$11,002,672**	**$100,626,971**	**$2,716,198**	**$114,345,841**
Administrative Salaries and Benefits	$ 607,674	$1,745,715	$271,620	$2,625,009
Maintenance Labor and Benefits	$802,342			$802,342
Tenant Services	$94,175	$318,167		$412,342
Materials & Supplies, Contract Costs	$1,151,096			$1,151,096
General Expenses	$1,252,210	$3,241,442		$4,493,652
Housing Assistance Payments		$86,893,340		$86,893,340
Utilities	$1,197,299			$1,197,299
Capital Improvement			$2,444,578	$2,444,578
Total Uses	**$5,104,796**	**$92,198,663**	**$2,716,198**	**$100,019,657**
NET SURPLUS BEFORE OPERATING TRANSFERS	**$5,897,876**	**$8,428,308**	**$0**	**$14,326,184**
Operating Transfers to Block Grant	($3,000,000)	($10,110,883)		($13,110,883)
Transfers for CHA Program Loans	($1,223,467)	-		($1,223,467)
NET SURPLUS AFTER OPERATING TRANSFERS	**$1,674,409**	**($1,682,575)**	**$0**	**($8,166)**

OTHER FEDERAL FUNDS - FY19

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.

	NED/VASH	Mainstream	Mod Rehab and Shelter Care	Total Other Federal Funds
SOURCES				
HUD Subsidy Income	$ 2,706,002	$ 3,316,808	$ 1,103,351	$ 7,126,161
Administrative Fee Income	$ 211,979	$ 276,210	$ 131,247	$ 619,436
Total Sources	**$ 2,917,981**	**$ 3,593,018**	**$ 1,234,598**	**$ 7,745,596**
USES				
Administrative	$ 258,582	$ 290,731	$ 129,185	$ 678,498
Rent Payments	$ 2,535,035	$ 2,524,113	$ 1,105,204	$ 6,164,352
Total Expenses	**$ 2,793,617**	**$ 2,814,844**	**$ 1,234,389**	**$ 6,842,850**
NET SURPLUS (DEFICIT)	**$ 124,364**	**$ 778,174**	**$ 209**	**$ 902,746**

STATE FUNDS - FY19

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

	MRVP	State Public Housing	Total State Funds
SOURCES			
Operating Receipts		$ 589,236	$ 589,236
Operating Subsidy	$ 1,191,483	$ 1,383,698	$ 2,575,181
Total Sources	**$ 1,191,483**	**$ 1,972,934**	**$ 3,164,417**
USES			
Administrative	$ 144,174	$ 300,509	$ 444,683
Tenant Services	$ -	$ 97,099	$ 97,099
Maintenance Labor	$ -	$ 175,460	$ 175,460
Materials/Supplies, Contract Costs	$ -	$ 311,986	$ 311,986
General Expenses	$ -	$ 339,447	$ 339,447
Rent Payments	$ 1,121,365		$ 1,121,365
Utilities		$ 229,568	$ 229,568
Total Operating Expenses	**$ 1,265,539**	**$ 1,454,069**	**$ 2,719,608**
Capital Improvements	$ -	$ 456,445	$ 456,445
MTW Block Grant transfers	$ 74,056	$ 456,445	$ 530,501
Net Surplus (Deficit)	**$ 0**	**$ 518,865**	**$ 518,865**

NON-FEDERAL FUNDS AND OTHER DEVELOPMENT SOURCES AND USES - FY19

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.

AVAILABLE FUNDS-1/1/2019	**$**	**10,780,033**
Sources of Cash		
Leased housing anciallary fee income		19,012
Transfer from HCV program		1,948,459
Funds from City of Cambridge		3,700,769
Development Fee income		2,713,364
Total Sources	**$**	**8,381,604**
Total Cash	**$**	**19,161,637**
Uses of Cash		
Admininistrative Salaries	$	68,776
Administrative Costs and Overhead	$	44,261
CHA Program Loans to LLCs	$	15,718,686
Subtotal	**$**	**15,831,723**
AVAILABLE FUNDS- 12/31/2019	**$**	**3,329,915**

CENTRAL OFFICE COST CENTER - FY19

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

	CY 2019 Actual
SOURCES	
Total Management Fees	$ 4,828,367
Fee-for-Service fees	$ 1,172,249
Total Sources	**$ 6,000,616**
USES	
Administrative Salaries	$ 2,443,843
Central Maintenance	$ 1,484,068
Benefits	$ 1,153,920
Administrative Contracts	$ 252,286
Office Rent	$ 239,269
Other Admin. OH	$ 538,802
Total Expenses	**$ 6,112,188**
NET SURPLUS (DEFICIT)	**$ (111,573)**

MTW BLOCK GRANT - FY19

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

		CY 2019 Actual
Available Funds, 1/1/2019	**$**	**791,943**
Sources of Cash		
MTW HCV Transfers	$	10,110,883
Reimbursement of pre-dev costs	$	1,232,722
Acquisition Proceeds	$	1,000,000
City of Cambridge Funding	$	1,424,351
Miscellaneous Receipts	$	72,462
Transfers from Public Housing	$	3,000,000
Development Fees transferred from Non Federal	$	2,340,743
Total Available Funds	**$**	**19,973,103**
Uses of Cash		
Operating Transfers		
Transfers to MRVP / State Housing	$	74,056
P & D Admin Support & working capital	$	2,677,422
P& D Mixed working capital pre-dev costs	$	2,009,159
Program Loans to LLCs	$	11,850,507
PT Lab and MTW initiatives	$	243,273
Total Uses	**$**	**16,854,417**
Available Funds 12 31 19	**$**	**3,118,686**

HUD REQUIREMENTS
HOUSING STOCK

(II) GENERAL OPERATING INFORMATION
ANNUAL MTW REPORT

A. HOUSING STOCK INFORMATION

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

PROPERTY NAME	NUMBER OF VOUCHERS NEWLY PROJECT-BASED		STATUS AT END OF PLAN YEAR**	RAD?	DESCRIPTION OF PROJECT
	Planned*	Actual			
Concord Highlands	8	8	Committed	N	Eight Project-based Units
UDIC	0	25	Leased	Y	Former public housing units
Cambridgeport Commons	0	10	Leased	Y	Former public housing units
Garfield St	0	8	Leased	Y	RAD/Section 18 Project
Jefferson Park	0	175	Leased	N	Section 18 Demo/Dispo
Roosevelt Towers	124	112	Leased	N	Section 18 Demo/Dispo

Planned: 301 Actual: 338 Total Vouchers Newly Project-Based

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

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

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

The difference in numbers is due to CHA not counting our public housing units undergoing RAD/Section 18 conversions as new project-based units in the past. Given the new RAD column in the current 50900 form, CHA is operating under the assumption that these units should be counted in this section.

ii. Actual Existing Project Based Vouchers

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

PROPERTY NAME	NUMBER OF PROJECT-BASED VOUCHERS		STATUS AT END OF PLAN YEAR**	RAD?	DESCRIPTION OF PROJECT
	Planned*	Actual			
59 Norfolk Street	4	4	Leased	No	Project-based Units
8-10 Lancaster St	55	55	Leased	No	Project-based Units
Auburn Court Phase 1	40	40	Leased	No	Project-based Units
Auburn Court Phase 2	30	30	Leased	No	Project-based Units
Just-A-Start Otis	7	7	Leased	No	Project-based Units
195 Prospect Street	17	17	Leased	No	Project-based Units
217 Western Ave	6	6	Leased	No	Project-based Units
Oxford	6	5	Leased	No	Project-based Units
Swartz Properties	7	7	Leased	No	Project-based Units
264 Putnam	8	8	Leased	No	Project-based Units
165 Western	8	8	Leased	No	Project-based Units
169-98 Auburn	7	7	Leased	No	Project-based Units
2595 Mass Ave	3	3	Leased	No	Project-based Units
35 Harvey St	4	4	Leased	No	Project-based Units
47-49 Lee St	10	10	Leased	No	Project-based Units
CASCAP 803-815	9	9	Leased	No	Project-based Units
Chapman Arms	25	25	Leased	No	Project-based Units
Harwell Homes	32	32	Leased	No	Project-based Units
Smith House Preservation	132	132	Leased	No	Project-based Units
Madison Park III	120	120	Leased	No	Project-based Units
Mckay House	9	9	Leased	No	Project-based Units
Just-A-Start Hovey	8	8	Leased	No	Project-based Units
Inman Square Apartments	116	116	Leased	No	Project-based Units
Bishop Allen Apartments	32	32	Leased	No	Project-based Units
404 Rindge Ave	110	110	Leased	No	Project-based Units
Neville Assisted Living	30	30	Leased	No	Project-based Units
Cambridge Court Apartments	98	98	Leased	No	Project-based Units
625 Putnam	32	32	Leased	No	Project-based Units
Putnam Square	94	94	Leased	No	Project-based Units

Trolley Rental	33	33	Leased	No	Project-based Units
Elm Place	8	8	Leased	No	Project-based Units
Louis Barret Residences	145	145	Leased	No	Project-based Units
Brookside Terrace	168	168	Leased	No	Project-based Units
St. Stephen's	130	130	Leased	No	Project-based Units
Cleaves Court	36	36	Leased	No	Project-based Units
Briston Arms	50	50	Leased	No	Project-based Units
Chauncy House	53	53	Leased	No	Project-based Units
Rindge House	14	14	Leased	No	Project-based Units
455-463 Cambridge St.	5	5	Leased	No	Project-based Units
New Mass Pike Towers LP	157	157	Leased	No	Project-based Units
808 Memorial Drive	76	76	Leased	No	Project-based Units
Coes Pond	250	250	Leased	No	Project-based Units
Temple Place	40	40	Leased	No	Project-based Units
Port Landing	8	8	Leased	No	Project-based Units
JFK Apartments	44	44	Leased	Y	RAD Conversion
Lincoln Way	53	53	Leased	Y	RAD Conversion
Willow St	14	14	Leased	Y	Project-based Units
St. Pauls	20	20	Leased	Y	Project-based Units
LBJ Apartments	177	177	Leased	Y	RAD Conversion
Russell Apartments	51	51	Leased	No	Section 18 PBV Conversion
Jefferson Park Apartments	104	104	Leased	No	Section 18 PBV Conversion
Millers River	297	297	Leased	No	Section 18 PBV Conversion
Manning Apartments	198	198	Leased	Y	RAD Conversion
Putnam Gardens	122	122	Leased	Y	RAD Conversion
Newtowne Court	268	268	Leased	Y	RAD Conversion
Burns Apartments	197	197	Leased	No	Section 18 PBV Conversion
Corcoran Park	153	153	Leased	No	Section 18 PBV Conversion
Jefferson Park	175	175	Leased	No	Section 18 PBV Conversion
Roosevelt Towers	124	112	Leased	No	Section 18 PBV Conversion
Concord Highlands	8	8	Leased	No	Newly Project-Based Units
UDIC	0	25	Leased	No	Section 18 PBV Conversion
Cambridgeport Commons	0	10	Leased	No	Section 18 PBV Conversion
Garfield St	0	8	Leased	No	Section 18 PBV Conversion

Planned: 4,364 Actual: 4,318 Total Existing Project-Based Vouchers

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

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

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

CHA is including RAD and Section 18 conversions in this section. The timing of conversion and number of units converted accounts for the difference and planned to actual vouchers.

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

ACTUAL OTHER CHANGES TO MTW HOUSING STOCK IN THE PLAN YEAR
Vacant units were held off line for relocation of residents in buildings requiring substantial construction.

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

GENERAL DESCRIPTION OF ALL ACTUAL CAPITAL EXPENDITURES DURING THE PLAN YEAR
CHA's Planning and Development Department spent over $44 million in renovation work impacting 974 units of housing at twelve different sites, in the planning stages of work totaling over $400 million at six other sites impacting 639 units of housing, and $542,560 in smaller construction projects including boiler replacements and masonry restoration.

B. LEASING INFORMATION

i. Actual Number of Households Served
Snapshot and unit month information on the number of households the MTW PHA actually served at the end of the Plan Year.

NUMBER OF HOUSEHOLDS SERVED THROUGH:	NUMBER OF UNIT MONTHS OCCUPIED/LEASED*		NUMBER OF HOUSEHOLDS SERVED**	
	Planned^^	Actual	Planned^^	Actual
MTW Public Housing Units Leased	1,758	3,204	293	267
MTW Housing Choice Vouchers (HCV) Utilized	73,686	72,876	5,994	6,073
Local, Non-Traditional: Tenant-Based	1,824	1,656	152	138
Local, Non-Traditional: Property-Based	0	0	0	0
Local, Non-Traditional: Homeownership	0	0	0	0
Totals	77,268	77,736	6,439	6,478

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

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

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

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

The totals are very close to expected benchmarks.

LOCAL, NON-TRADITIONAL CATEGORY	MTW ACTIVITY NAME/ NUMBER	NUMBER OF UNIT MONTHS OCCUPIED/ LEASED*		NUMBER OF HOUSEHOLDS TO BE SERVED*	
		Planned^^	Actual	Planned^^	Actual
Tenant-Based	Use MTW Resources to Augment State MRVP Leasing Program HC.2001.01	84	84	7	7
Tenant-Based	Sponsor-based Voucher Program HC.2008.03	1,488	1,332	124	111
Tenant-Based	Pathways to Permanent Housing HC.2008.03A	252	240	21	20
Totals	_	1,824	1,656	152	138

* The sum of the figures provided should match the totals provided for each Local, Non-Traditional category in the previous table. Figures should be given by individual activity. Multiple entries may be made for each category if applicable.

^^ The corresponding plan for this report followed the previous 50900 format. This table was not a part of the previous template. Going forward all future reports will have a corresponding plan in the current 50900 format.

HOUSEHOLDS RECEIVING LOCAL, NON-TRADITIONAL SERVICES ONLY	AVERAGE NUMBER OF HOUSEHOLDS PER MONTH	TOTAL NUMBER OF HOUSEHOLDS IN THE PLAN YEAR
PPH-TA HC.2008.03A	20	241

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

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

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

C. WAITING LIST INFORMATION

i. Actual Waiting List Information

Snapshot information on the actual status of MTW waiting lists at the end of the Plan Year. The "Description" column should detail the structure of the waiting list and the population(s) served.

WAITING LIST NAME	DESCRIPTION	NUMBER OF HOUSEHOLDS ON WAITING LIST	WAITING LIST OPEN, PARTIALLY OPEN OR CLOSED	WAS THE WAITING LIST OPENED DURING THE PLAN YEAR
Family Housing (MTW and Non-MTW)	Site-based	7,678	Open	No
Elderly/Disabled Housing (MTW and Non-MTW)	Site-based	2,792	Open	No
HCV Program (MTW and Non-MTW Vouchers)	Community-wide and site-based	16,283	Open	No
HCV Program SRO Only (MTW and Non-MTW Vouchers)	Community-wide	1,195	Open	No

Please describe any duplication of applicants across waiting lists:

Applicants are free to apply for any waitlist for which they are eligible. Across all programs CHA identified 19,072 unique applicants that submitted a total of 163,485 applications across all programs.

ii. Actual Changes to Waiting List in the Plan Year

Please describe any actual changes to the organizational structure or policies of the waiting list(s), including any opening or closing of a waiting list, during the Plan Year.

N/A	N/A

D. INFORMATION ON STATUTORY OBJECTIVES AND REQUIREMENTS

i. 75% of Families Assisted Are Very Low Income

HUD will verify compliance with the statutory requirement that at least 75% of the households assisted by the MTW PHA are very low income for MTW public housing units and MTW HCVs through HUD systems. The MTW PHA should provide data for the actual families housed upon admission during the PHA's Plan Year reported in the "Local, Non-Traditional: Tenant-Based"; "Local, Non-Traditional: Property-Based"; and "Local, Non-Traditional: Homeownership" categories. Do not include households reported in the "Local, Non-Traditional Services Only" category.

INCOME LEVEL	NUMBER OF LOCAL, NON-TRADITIONAL HOUSEHOLDS ADMITTED IN THE PLAN YEAR*
80%-50% Area Median Income	1
49%-30% Area Median Income	12
Below 30% Area Median Income	374

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

ii. Maintain Comparable Mix

HUD will verify compliance with the statutory requirement that MTW PHAs continue to serve a comparable mix of families by family size by first assessing a baseline mix of family sizes served by the MTW PHA prior to entry into the MTW demonstration (or the closest date with available data) and compare that to the current mix of family sizes served during the Plan Year.

BASELINE MIX OF FAMILY SIZES SERVED (upon entry to MTW)*					
FAMILY SIZE	OCCUPIED PUBLIC HOUSING UNITS	UTILIZED HCVs	NON-MTW ADJUSTMENTS	BASELINE MIX NUMBER	BASELINE MIX PERCENTAGE
1 Person	N/A	N/A	N/A	2270	50%
2 Person	N/A	N/A	N/A	999	22%
3 Person	N/A	N/A	N/A	609	13%
4 Person	N/A	N/A	N/A	372	8%
5 Person	N/A	N/A	N/A	194	4%
6+ Person	N/A	N/A	N/A	94	2%
TOTAL	N/A	N/A	N/A	4,358	100%

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

MIX OF FAMILY SIZES SERVED (in Plan Year)				
FAMILY SIZE	BASELINE MIX PERCENTAGE**	NUMBER OF HOUSEHOLDS SERVED IN PLAN YEAR^	PERCENTAGE OF HOUSEHOLDS SERVED IN PLAN YEAR^^	PERCENTAGE CHANGE FROM BASELINE YEAR TO CURRENT PLAN YEAR
1 Person	50%	3,258	51%	1%
2 Person	22%	1,491	23%	1%

3 Person	13%	789	12%	1%
4 Person	8%	479	8%	0%
5 Person	4%	237	4%	0%
6+ Person	2%	116	2%	0%
TOTAL	100%	6,370	100%	0%

** The "Baseline Mix Percentage" figures given in the "Mix of Family Sizes Served (in Plan Year)" table should match those in the column of the same name in the "Baseline Mix of Family Sizes Served (upon entry to MTW)" table.

^ The "Total" in the "Number of Households Served in Plan Year" column should match the "Actual Total" box in the "Actual Number of Households Served in the Plan Year" table in Section II.B.i of this Annual MTW Report.

^^ The percentages in this column should be calculated by dividing the number in the prior column for each family size by the "Total" number of households served in the Plan Year. These percentages will reflect adjustment to the mix of families served that are due to the decisions of the MTW PHA. Justification of percentages in the current Plan Year that vary by more than 5% from the Baseline Year must be provided below.

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

iii. Number of Households Transitioned to Self-Sufficiency in the Plan Year
Number of households, across MTW activities, that were transitioned to the MTW PHA's local definition of self sufficiency during the Plan Year.

MTW ACTIVITY NAME/NUMBER	NUMBER OF HOUSEHOLDS TRANSITIONED TO SELF SUFFICIENCY*	MTW PHA LOCAL DEFINITION OF SELF SUFFICIENCY
Financial Stability and Savings SS.2013.01*	29	Participants experiencing positive EOP
Financial Stability and Savings SS.2013.01**	181	Participants that experienced a reduction in subsidy.
Sponsor-Based Voucher Program HC.2008.03*	10	Positive exit from Sponsor-based voucher program.
Implement Recertifications Every two years for Households/hcv- HC.2008.08 *	44	Positive EOP from CHA Housing
Rent Simplification Program (RSP)/Public Housing - CE.2006.01*	15	Positive Exit from CHA Housing
	279	(Households Duplicated Across MTW Activities)

250 Total Households Transitioned to Self Sufficiency

* Figures should match the outcome reported where metric SS#8 is used in Section IV of this Annual MTW Report.

** This metric is a CHA metric and does not represent a number where metric SS#8 was used. CHA believes the reduction in subsidy these participants experienced represent an important self-sufficiency step. If this group is removed, then the total would come to 38 across all

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 took a different approach and CHA automatically created Rent-to-Save accounts for all residents at Jefferson Park Federal and Corcoran Park. One percent (1%) of rent charged was 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 wasalso put into the account. This program ended in early 2019 and CHA is currently evaluating the outcomes. CHA hopes to build on the success on both these programs by evaluating RTS and with the implementation of a new FSS+ escrow calculation approved in the FY20 Plan.

IMPACT

See metrics.

PLANNED SIGNIFICANT/NON-SIGNIFICANT CHANGES

None.

CHANGES TO BENCHMARKS, BASELINE, METRICS

None for HCV. Benchmark values for RTS were first set in FY18 Plan. Outcome values for FSS+ and RTS are consistent with benchmarks set in the FY19 Plan. No new signifcant or insignificant changes to activity or metrics in FY.

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**: $36,996 Average earned income for FSS+ Participants that have been in the program at least one year and experienced an increase in earnings: $37,310 Average earned income of RTS Participants: $24,262 JP Enrolled in coaching: $30,907 JP total: $23,606 Cp Total: $25,030 Average earned income of RTS Participants that have earned income: $37,389 JP Coaching: $47,550 JP Total: $37,249 CP: $37,544	All FSS+ participants: 87 Average Earned Income for all FSS+ participants: $38,655 FSS+ participants that have been in the program for at least one year and experience an increase in earnings:83 **Average Earned Income for FSS+ participants that have been in the program for at least one year and experienced an increase in earnings**: $38,793 **Average Earned Income for all RTS participants**: $24,169 JP Enrolled in coaching: $31,689 JP Total: $24,198 CP: $24,136 Average earned income of RTS participants that have earned income: $37,964 JP Enrolled in coaching: $41,334 JP Total: $39,351 CP: $36,450	Yes (FSS+). No (Rent-to-Save). Rent-to-Save fell short in a couple earned income predictions. The numbers use mirror the FY18 Report. The program ended in early FY19 and using the full prior FY is the most accurate measure for these numbers.
SS #2: Increase in Household Savings				

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

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average amount of savings/escrow of households affected by this policy in dollars (increase).	$0	**For participants that have been in the program for at least one year and established an escrow account:** $3,672 RTS: $888 JP Coaching: $2,045 JP: $1,185 CP: $760	**FSS+ participants that have been in the program for at least one year and established an account** $4,065 **Total RTS participants:** $1,232 JP Enrolled in coaching: $2,076 JP Total: $1,349 CP: $1,094	Yes.
SS #5: Households Assisted by Services that Increase Self Sufficiency				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Number of households receiving services aimed to increase self sufficiency (increase).	0 households	FSS+ participants: 175 Total RTS: 319 JP enrolled in coaching: 45 JP total: 166 CP: 149	**FSS+ participants:** 87 **Total RTS participants:** 323 JP Enrolled in coaching: 60 JP Total: 174 CP: 149	No. CHA has held off on heavily marketing FSS+ in anticipation of rolling out a new escrow calculation in FY20 (refer to FY20 plan for reference). CHA anticipates being able to ramp up enrollment by late 2020.
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: 123 **Avg Housing Assistance Payment (HAP) at FSS+ enrollment for participants that have been in the program for at least one year:** $988 Avg subsidy RTS: $932 JP enrolled in coaching: $580 Jp Total: $566 CP: $1,360	FSS+ Participants that have been in the program for at least one year: 87 **Avg HAP of FSS+ participants that have been in the program for at least one year:** $1,067 **Avg subsidy of RTS participants based on ceiling rent:** $890 JP Enrolled in coaching: $545 JP Total: $552 CP: $1,303	No. FSS+ is very close and in line with the benchmark. Due to conversion at Corcoran Park, the ceiling rents were significantly higher, this drastically changed the end result of this metric for Rent-to-Save. The numbers at Jefferson Park are more reflective of actual program outcomes.

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	$120,000 Monthly Rent charged for RTS: $188,000 JP Enrolled in coaching: $20,686 JP Total: $83,608 CP: $83,357	**<u>Monthly</u> TTP aggregated for FSS+ participants that have been in the program for at least one year:** $84,031 **<u>Monthly</u> rent charged for RTS participants:** $191,878 JP Enrolled in coaching: $38,446 JP Total: $100,198 CP: $91,680	No (FSS+). Again, this is due to a large graduating class in FY2018 and the previously mentioned slowed enrollment in anticipation of a new escrow calculation
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:** 30 Number of RTS participants expected to experience end in subsidy: 0	Number of FSS+ participants that **experienced end in subsidy**: 28 Number of RTS participants that **experience end in subsidy**: 1	No, but close to benchmarks.
CHA: Increase in Credit Score				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Percent who increase credit score for participants who have been in the program for at least one year.	0	60%	FSS+ Participants: 65% JP Enrolled in coaching: 73%	Yes.
Average increase in credit score points for participants who have been in the program for at least one year and experienced an increase (in points).	0	40 points	FSS+ Participants: 42 JP Enrolled in coaching: 23	Close but no for Rent-to-Save. Some RTS participants came in with reasonably high credit scores and had less room for improvement.
CHA: Decrease or Maintain Zero Collection Debt				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Percent who decrease or maintain zero collection debt.	Percent of participants who had been in the program for the entire year during the first full year of implementation (60 participants) and had zero collection debt at intake: 45	Percent of participants who had been in the program for an entire year and had a decrease or zero collection debt: 70% JP Coaching: 70%	**Percent of FSS+ participants in the program for at least an entire year and had a decrease or zero collection debt:** 82% **Percent of JP Enrolled in coaching that had a decrease or zero collection debt:** 91%	Yes.
CHA: Increase in Household Income				

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

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Median earned income of households affected by this policy in dollars (increase). For those who have been in the program for one year and experienced an increase in earnings.	$20,800	FSS+ Participants that have been in the program for at least one year: $37,743 RTS Participants: $18,149 JP Enrolled in coaching: $16,581 JP Total: $15,086 CP: $19,681 Median eared income of RTS Participants that have earned income: $30,098 JP Enrolled in Coaching: $33,758 JP total: $29,425 CP: $32,420	All FSS+ participants: 87 All FSS+ participants: $37,743 FSS+ Participants that have been in the program for at least one year and experienced an increase in earnings:83 **FSS+ Participants that have been in the program for at least one year and experienced an increase in earnings:** $37,743 **RTS Participants:** $18,028 JP Enrolled in coaching: $20,842 JP Total: $13,104 CP: $19,614 Median earned income of RTS participants that have earned income: $29,981 JP Enrolled in coaching: $31,020 JP Total: $28,852 CP: $32,004	No, with the median earned income of JP coaching enrolled with earned income being the only number significantly off the benchmark. This is due to several lower-earning households enrolling in coaching. This is not a negative outcome but did cause the benchmark to not be met. All other benchmarks were exceeded with the exception of total median earned income at Jefferson Park which narrowly missed the benchmark.
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: 59% RTS Participants: 48%	**FSS+ Participants:** 95% **RTS Participants:** 48%	Yes.
CHA: Households Transitioned to Self-Sufficiency				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**

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

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**: 30 RTS Participants that experienced a reduction in subsidy: 87 JP Enrolled in coaching: 19 JP Total:77 CP:10	**FSS+ Participants that have been in the program for at least one year <u>and</u> experienced a reduction in subsidy**: 83 RTS Participants that experienced a reduction in subsidy: 98 JP Enrolled in coaching: 38 JP Total: 84 CP: 14	Yes.

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

HC.2011.01 - EXPIRING USE PRESERVATION PROGRAM

IMPLEMENTATION YEAR	PREVIOUSLY APPROVED AUTHORIZATION
Approved in FY11 and implemented in FY12.	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

1,868 total units have been preserved as a result of this activity.

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

PROJECT	CITY	HOUSING TYPE	FY ISSUE OF HAP	UNITS UNDER HAP CONTRACT*	UNITS PRESERVED*
Briston Arms	Cambridge	Family	FY16	50	50
Coes Pond	Worcester	Elderly/Disabled	FY16	250	250
Madison Park	Boston	Family	FY16	120	120
Landfall Apartments	Boston	Family	FY17	15	15
Quincy Tower	Boston	Elderly/Disabled	FY17	162	162
TOTAL				**1,868**	**1,868**

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

PLANNED SIGNIFICANT/NON-SIGNIFICANT CHANGES

Moving forward CHA anticipates that properties converting under the Expiring Use Preservation Program may consist of 100% Enhanced Vouchers at the time of conversion. Regardless of the ratio of Enhanced Vouchers and Project-Based Vouchers, CHA will continue to Project-Base vouchers when a family with an Enhanced Voucher moves out of the unit. CHA will enter into HAP contracts for Expiring Use properties which will include the number of back-up vouchers slated for conversion from Enhanced to Project-Based Vouchers in order to preserve as many units as possible with long-term affordable Project-Based assistance. Households that elect CHA's project-based program will be subject to all applicable MTW policies, unless otherwise stated in the individual preservation agreement.

CHANGES TO BENCHMARKS, BASELINE, METRICS

No new signifcant or insignificant changes to activity or metrics.

HC.2011.01 - EXPIRING USE PRESERVATION PROGRAM

HC #2: Units of Housing Preserved				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase).	0	Total Units: 1,842 Units already preserved: 1,842 **Units Planned:** 0	Total Units: 1,868 Units already preserved: 1,868 **Units Preserved in FY:** 0*	Yes, numerical difference is from updating unit numbers that had been misnumbered in past reports. No new units were preserved with this activity in FY19.

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.	22
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.	0
6	Transition House	2009	Victims of domestic violence.	14
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
14	Casa Myrna Vazquez	2017	Survivors of the sex trade.	8
			TOTAL	**111**

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.

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. This program is making use of 17 vouchers as of FY19.

IMPACT

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

Partner	Highlights
Heading Home	•Two Households transitioned to self-suffiency in market-rate rental units without ongoing housing subsidies. •Three households transitioned out of the program with ongoing housing subsidies.

Partner	Highlights
Y2Y	Please view the Y2Y Annual Report- https://www.y2ynetwork.org/wp-content/uploads/2019-Annual-Report.pdf

Partner	Highlights
Home for Little Wanderers Roxbury + Temple Place	May-June 2019- 2 graduated high school, 3 graduated community colleges with their associates degrees. • 1-Graduated from Roxbury Community College on May 17thwith a major in Liberal Arts. She completed her internship she received through the Year Up program at the Harvard Business School-Technology Department. She completed the Resilient Coders program in December 2019. She received admissions to Northeastern University. Starts course spring 2020. • 2-Graduated from Roxbury Community College on May 17thwith a major in Biological Science. She found an apartment with her boyfriend and transferred to UMass-Amherst in August to major in Animal Science for her bachelor's degree. She completed her internship at Bridges to Baccalaureate prior to her transfer in August . • 3-Graduated from Massasoit Community College on May 31st with a major in psychology. She transferred to Bridgewater State University to continue majoring in psychology for her bachelors degree. She worked at Uno's Restaurant in Braintree. Is currently working at an after school program located at knights of Columbus in Quincy. • 4-Graduated from Greater Egleston Community High School on June 7th. Took summer and fall courses at Bunker Hill under Liberal Arts/Psychology. Worked at Loft clothing store in assembly row. • 5-Graduated from Everette High on June 12th. Started attending UMass Boston in the fall. Her major is undecided. Worked at Express clothing store at Assembly Row. Participated in jumpstart program through AmeriCorps. She was awarded the Breckinridge Scholarship of $1,500. -6-graduated from Belmont high, transitioned to SV in June, enrolled at UMass. Started summer program and courses in the fall 2019. Worked at prime mark. Currently works at tru religion. -7 continues to receive straight A's at Simmons university. Pursuing bachelors degree in social work. Works as a baby sitter part-time. Completing internship at Children Services of Roxbury. -8 pursuing bachelors degree at Fisher college. Major Human Resources. -9 obtaining high school diploma at Day and evening academy and working part time at the Croc center. -10 pursing degree in early childhood education at bunker hill. -11 worked full time at H&M's insurance company, full Benefits, saved money and transitioned to shared rental-single family house with boyfriend and two other friends (couple · Currently all Y/A's are working or attending school. · Y/A cleared all court involvement, obtained license and enrolled into a construction program. · 2 Y/A's Transitioned into permanent housing · All Y/A's have active banking accounts.

Partner	Highlights
PATHWAYS TO PERMANENT HOUSING - PPH	
Transition House	Service Highlights: Our Elder Advocate has also connected with almost all property managers and service providers in CHA elder buildings to provide training for staff on elder abuse, domestic violence and bullying.

PLANNED SIGNIFICANT/NON-SIGNIFICANT CHANGES

None.

CHANGES TO BENCHMARKS, BASELINE, METRICS

No new signifcant or insignificant changes to activity or metrics.

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

HC #5: Increase in Resident Mobility				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	0 households	Hard to House: 124 Transition House: 4 Heading Home: 21 **Total Households:** 149	Hard to House: 387 (111 vouchers) Transition House: 3 Heading Home: 57 households (17 vouchers) Total Households: 453	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: 124 Transition House: 4 Heading Home: 21 **Total Households:** 149	Hard to House: 387 Transition House: 4 Heading Home: 57 (21 vouchers)	Yes
SS #5: Households Assisted by Services that Increase Self Sufficiency				

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

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: 387 Transition House: 3 Heading Home: 57 (17 vouchers)	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	10 Households	Yes.
CE #4: Increase in Resources Leveraged[2]				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Amount of funds leveraged in dollars (increase)	$0	$3.3 million	$3 million	No but very close.
CHA HC: Number of Households Served Per Voucher				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Number of households served per voucher (Hard to House Program)	1 household	2.6 households	3.6 households*	Yes

1. Household count may exceed the voucher count depending on the program structure and client turnover.

2. Resources leveraged does not account for an abbreviated program period during the FY.

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

IMPLEMENTATION YEAR

Approved in FY01 MTW Plan and implemented in FY01.

PREVIOUSLY APPROVED AUTHORIZATION

2009 MTW Agreement, Attachment D.A.1

DESCRIPTION

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

Fiscal Year	Households Served	MRVP HAP	MTW Funds	Monthly MRVP Average/HH	Monthly MTW Average/HH
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
FY18	7	$42,636	$64,150	$508	$764
FY19	7	$48,486	$83,139	$577	$990

IMPACT

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

PLANNED SIGNIFICANT/NON-SIGNIFICANT CHANGES

None.

CHANGES TO BENCHMARKS, BASELINE, METRICS

No new significant or insignificant changes to activity or metrics.

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

HC #4: Displacement Prevention				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Number of households at or below 80% AMI that would lose assistance or need to move (decrease).	10 households	7 households A household left and there is a moratorium on issuing new MRVP Vouchers.	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: $53,052 Total households served: 7 **MRVP subsidy amount:** $35,516	Amount of MTW funds spent: $83,139 Total households served: 7 **MRVP subsidy amount:** $48,486	Yes.

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

IMPLEMENTATION YEAR	PREVIOUSLY APPROVED AUTHORIZATION
Approved and implemented in FY00.	2009 MTW Agreement, Attachment C.B.1.ii, C.C.12, C.C.13

DESCRIPTION

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

IMPACT

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

PLANNED SIGNIFICANT/NON-SIGNIFICANT CHANGES

In the past, we see units completed as units on-line. This metric has been adjusted to use development closing as the measure for completed. Closings are easier to track and reflect when project-based subsidies are in place. The FY19 benchmark should have been set at 2,188 and actual was 2,225 as reflected below.

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: 1,895 Anticipated in FY: 293 **Total Units**: 2,427	Units completed to date: 1,895 New units: 330 **Total Units:** 2,225	Yes.

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

IMPLEMENTATION YEAR	PREVIOUSLY APPROVED AUTHORIZATION
Approved in FY08 MTW Plan and implemented in FY08. Modified in FY13.	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
2019	0	0
2018	0	2
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.

PLANNED SIGNIFICANT/NON-SIGNIFICANT CHANGES

None.

CHANGES TO BENCHMARKS, BASELINE, METRICS

No new signifcant or insignificant changes to activity or metrics.

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

HC #5: Increase in Resident Mobility				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	0 households	2 households	0 households	No. This activity is meant for households in crisis so this is not a negative outcome.

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

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

INCREASING HOUSING CHOICE:

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

REDUCE COST AND ACHIEVE GREATER COST EFFECTIVENESS IN FEDERAL EXPENDITURES

CE.2006.01	Rent Simplification Program

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

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

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

DESCRIPTION

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

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

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

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

IMPACT

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

PLANNED SIGNIFICANT/NON-SIGNIFICANT CHANGES

None.

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. No new signifcant or insignificant changes to activity or metrics.

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

HC #4: Displacement Prevention				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Number of households at or below 80% AMI that would lose assistance or need to move (decrease). If units reach a specific type of household, give that type in this box.	0 households	Anticipated households that will lease units in Cambridge at over 120% FMR at initial move-in: 53	**Households that leased units in Cambridge at over 120% FMR at initial move in:** 0	No. Software error resulted in benchmark error for FY19. Due to SAFMR, it is increasingly unlikely for a household to come in at a 120% exception rent.

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

IMPLEMENTATION YEAR

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

PREVIOUSLY APPROVED AUTHORIZATION

2009 MTW Agreement, Attachment C.D.7

DESCRIPTION

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

Sections of 24 CFR 983 Waived Through MTW Authority

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

PLANNED SIGNIFICANT/NON-SIGNIFICANT CHANGES
None.

CHANGES TO BENCHMARKS, BASELINE, METRICS
No new signifcant or insignificant changes to activity or metrics.

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

HC #1: Additional Units of Housing Made Available				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**

Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household, give that type in this box.	0 units	Units project-based through expanding supply of hard units in FY: 293 Units project-based through Expiring Use in FY: 0 Units project-based through private nonprofit developers in FY: 8 Anticipated new units: 301	Units project-based through expanding supply of hard units in FY: 330 Units project-based through Expiring Use in FY: 0 Units project-based through private nonprofit developers in FY: 8 **Total New units in FY:** 338	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	Units project-based through expanding supply of hard units in FY: 293 Units project-based through Expiring Use in FY: 0 Units project-based through private nonprofit developers in FY: 8 Anticipated new units: 301	Units project-based through expanding supply of hard units in FY: 330 Units project-based through Expiring Use in FY: 0 Units project-based through private nonprofit developers in FY: 8 **Total New units in FY:** 338	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%	60%	60%	Yes.

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

IMPLEMENTATION YEAR **PREVIOUSLY APPROVED AUTHORIZATION**

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.

FY19 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	1	2	$0	$0
Zero Income at New Admission outside Cambridge	0	0	0	0	$0
$50 Minimum Rent or less at New Admission in Cambridge	2	1	2	$43	$4,716 - $8,856
$50 Minimum Rent or less at New Admission outside Cambridge	1	1	4	$7	$8,268
Total	**5**	**3**			

PLANNED SIGNIFICANT/NON-SIGNIFICANT CHANGES

None.

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	0 households	1 households at initial lease-up	Yes.

HC.2000.02 - IMPLEMENT VACANCY AND DAMAGE PAYMENTS/HCV

IMPLEMENTATION YEAR	PREVIOUSLY APPROVED AUTHORIZATION
Approved and implemented in FY00.	MTW Agreement, Attachment C.D.1.d

DESCRIPTION

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

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

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

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

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

IMPACT

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

2019 Vacancy/Damage Payments

Total Distinct Owners: 21

Total Distinct Units: 107

Total Vacancy/Damage 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	4	$41,840	32	$1,308	$0	$0	$0	$0
Project-based vouchers	11	$60,066	49	$1,226	6	$26,222	28	$937
Total	15	$101,906	81		2	$26,222	28	

2019 Owners[1]

Total Distinct Owners: 1,212

	In Cambridge	Outside Cambridge
Tenant-Based	266	845
Project-Based	34	15
Inclusionary	37	0
State	46	27

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

PLANNED SIGNIFICANT/NON-SIGNIFICANT CHANGES

None.

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	19	107	Yes. The number reflects total units in FY 2019.

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

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

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

IMPLEMENTATION YEAR

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

DESCRIPTION

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

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

Below is a table of aggregate earned income of HCV participants in the last 6 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
FY18	$48,392,929	+$1,187,914
FY19	$46,971,135	-$1,421,794

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

Households with Real Property and Significant Assets

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

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

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

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

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

Changes in Family Composition

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

Restriction on Moves

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

Mixed Family Rent

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

FY19 COUNT OF MINIMUM AND MIXED RENT HCV HOUSEHOLDS

HCV Participants	Mixed Rent	$0 Rent	Between $0 and $50 Rent	At $50 Minimum
In Cambridge	9	191	51	48
Outside Cambridge	10	229	39	43
Total	**19**	**420**	**90**	**91**

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

DESCRIPTION

Similar to the biennial recertification policy in Public Housing, a biennial recertification schedule will apply to all HCV households. This initiative will allow residents to retain any additional income that they experience between recertifications and provide them with an opportunity to build savings and, at the same time, eases the burden of administering annual recertifications. For non-elderly, non-disabled households, up to two voluntary requests for interim rent reductions may be made between regular recertifications. The limit on interim recertifications will not apply to elderly or disabled households.

ACTIVITY STATUS

This initiative began with reorganizing recertification dates to spread over a biennial time period.

ANTICIPATED CHANGES

No new signifcant or insignificant changes to activity or metrics.

IMPLEMENTATION YEAR
This inititiative was approved in FY08. It was modified in FY18 and was implemented in FY18.

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

PLANNED SIGNIFICANT/NON-SIGNIFICANT CHANGES
None.

CHANGES TO BENCHMARKS, BASELINE, METRICS
None.

SS #3: Households Increase in Positve Incomes in Employment Status				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved**
Other: Full and/or Part-Time Employment	**Current Total:** 4094 **Total Employed:** 1783 **Percent:** 43%	**Current Total:** 4094 **Total Employed:** 1783 **Percent:** 43%	**Current Total:** 4,101 **Total Employed:** 2,170 **Percent:** 53%	Yes.
SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)				
Unit of Measurement	**Baseline**	**Benchmark**		
Number of households receiving TANF assistance (decrease).	**Households receiving TANF:** 377	377	427	No but close.
SS #8: Households Transitioned to Self Sufficiency				
Unit of Measurement	**Baseline**	**Benchmark**		
Number of households transitioned to self sufficiency (increase).	Households that left housing as a result of renting or purchasing a home in the private market in current: 16	**16**	44	Yes. Number represents voucher given up. Assumed positive move to market.

Authorized Unit Size Due to Changes to the Household	This policy allows changes in the authorized unit size the month following the approval of an additional household member. For decreases in household size, the authorized unit size will change at the first regular recertification after the decrease in household size occurs. This policy provides families with more timely increases in subsidy standards when family size increases. Participants that have obtained written owner approval to add a household member may request that CHA add the household member as an authorized household member and re-determine the subsidy size based on the occupancy guidelines above. If the subsidy size for the family changes during the term of the HAP Contract, the "new" subsidy size is effective as follows: • If the subsidy size is increased, the change is effective on the first of the month following the date that the new household member is approved by CHA. • If the participant provided proper written notice of a decrease in household size, the change is effective at the first regular recertification following the change. • If it is determined that the participant failed to provide the proper written notice of a decrease in family size, change is retroactive to the first of the month following the date that the household member left the household.

IMPACT

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

PLANNED SIGNIFICANT/NON-SIGNIFICANT CHANGES

None.

CHANGES TO BENCHMARKS, BASELINE, METRICS

No new signifcant or insignificant changes to activity or metrics.

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

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

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

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: 2,221 Interims Performed: 4,231 Recertification Time: 1.25 hours Interim Time: .75 hours Hourly cost of recertification specialist: $42.25 **Total cost:** $178,770	Recertifications performed: 1,866 Interims Performed in FY18: 2,268 Recertification Time: 1.25 hours Interim Time: .75 hours Hourly cost of recertification specialist: $42.25 **Total cost:** $170,415	Yes. Note: the interim count includes rent increase interims. CHA's current software does not have a mechanism to differentiate interim types. This has resulted in an artificially high number of interims that are not related to the interim limit policy.
CE #2: Staff Time Savings/HCV				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Total time to complete the task in staff hours (decrease).	Recerts performed in FY06: 2,120 Interims Performed in FY06: 1,033 Annual Recertification Time: 1.25 hours Interim Time: .75 hours **Total time:** 3,425 hours	6,453 hours	Recerts performed: 1,866 Interims Performed: 2,268 Annual Recertification Time: 1.25 hours Interim Time: .75 hours **Total Time:** 4,034 hours	Yes.
CE #3: Decrease in Error Rate of Task Execution/HCV				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Average error rate in completing a task as a percentage (decrease)	Rent determination errors from a quality control audit in December 2013: 30%	20%	30%	No.
CE #5: Increase in Agency Rental Revenue/HCV				

CE.2006.01 - RENT SIMPLIFICATION PROGRAM (RSP)/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	$19,800,000	$20,490,824	Yes.
CHA Metric: Average Household Income/HCV				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Average earned income of households affected by this policy in dollars	$22,072	$26,961	$26,979	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	$24,319	$24,492	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

In FY18, CHA identfied 69 public housing residents, 5 FPLI, and 34 RAD residents at ceiling rent.

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

PLANNED SIGNIFICANT/NON-SIGNIFICANT CHANGES

None.

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: $68 **Total cost of task:** $0	Hourly cost of staff that sets annual ceiling rent: $68 **Total cost of task:** $0	Yes. HUD is requiring the use of this metric. CHA maintains that this is an estimate and not an actual measure of time saved; therefore, staff time should not be applied as a metric. CHA does not support the use of this metric and cautions that it is only an estimate.
CE #2: Staff Time Savings				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Total time to complete the task in staff hours (decrease)	24 hours	0 hours	0 hours	Yes. HUD is requiring the use of this metric. CHA does not support the use of this metric and cautions that it is an estimate; we do not have the data to support the claimed decrease in staff hours.
CE #5: Increase in Agency Rental Revenue				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**
Rental revenue in dollars (increase)	Ceiling rent revenue collected in FY14: $1,926,858	Ceiling rent revenue to be collected in FY: $1,886,472	Ceiling Rent Revenue collected for Public Housing: $579,744 Ceiling Rent Revenue collected for RAD: $635,616 FPHC: $1,620,240 **Total**: $2,682,216	Yes.

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

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

IMPLEMENTATION YEAR

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

DESCRIPTION

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

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

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

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

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

Households with Real Property and Significant Assets

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

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

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

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

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

IMPACT

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

HARDSHIP APPLICATIONS

Application Year (by Fiscal Year)	Applications Received	Public Housing	HCV	Hardship Granted	Hardships Not Granted
2007	3	3	0	1	3
2008	1	1	0	0	1
2009	7	6	1	2	5
2010	10	10	0	8	2
2011	2	2	0	2	0
2012	1	0	1	0	1
2013	4	0	4	4	0
2014	2	1	1	1	1
2015	5	3	2	4	1
2016	0	0	0	0	0
2017	4	1	3	3	1
2018	4	2	2	2	2
2019	4	2	2	0	4
Total	**47**	**32**	**16**	**27**	**21**

FY19 HOUSEHOLDS TRANSITIONED TO HOMEOWNERSHIP OR MARKET RENT[2]

Program	Homeownership	Market rent	Total
Public Housing	3	0	3
RAD	4	5	9
Former Public Housing	1	2	3
Total	**8**	**7**	**15**

1. Covers CY 2019.
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.

FY19 COUNT OF MINIMUM AND MIXED RENT HOUSEHOLDS

Program	Mixed Rent	Zero Inc	$50 Minimum	Next Tier Minimum	Average Income
FPHC	0	20	34	6	$1,308
LIPH	0	8	14	0	$1,135
RAD	3	46	96	5	$1,539

FY19 COUNT OF MINIMUM AND MIXED RENT HOUSEHOLDS

Program	Mixed Rent	Zero Inc	$50 Minimum	Next Tier Minimum	Average Income
Total	**3**	**74**	**144**	**11**	

CHANGES TO BENCHMARKS, BASELINE, METRICS

Recertification and interim time was increased because tax credit recertifications are now part of the recertification. No new signifcant or insignificant changes to activity or metrics.

PLANNED SIGNIFICANT/NON-SIGNIFICANT CHANGES

None.

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: 1,701 Interims: 429 Recertification Time: 2.25 hours Interim Time: 2 hours Staff Cost/hr: $42.25 **Total Cost of Task**: $197,952	Total Recertifications: 1,951 Public Housing: 332 RAD: 1,044 Former Public Housing: 575 Total Interims: 362 Public Housing: 76 RAD: 226 Former Public Housing: 50 Recertification time: 2.25 hours Interim Time: 2 hours Staff Cost/hr: $42.25 **Total Cost of Task**: $218,169 Public Housing: $37,983 RAD: $118,342 Former Public Housing:$61,844	No but close.
CE #2: Staff Time Savings/PH/RAD				
Unit of Measurement	**Baseline**	**Benchmark**	**Outcome**	**Benchmark Achieved?**

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

DESCRIPTION

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

This initiative was approved in the FY08 Annual Plan.

UPDATE

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

TIMELINE FOR IMPLEMENTATION

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

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

DESCRIPTION

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

This initiative was approved in the FY08 Annual Plan.

UPDATE

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

TIMELINE FOR IMPLEMENTATION

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

ACTIVITIES ON HOLD - NONE AT THIS TIME.

ACTIVITIES CLOSED OUT

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

REASON FOR CLOSING OUT INITIATIVE

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

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

FINAL OUTCOME AND LESSONS LEARNED

Not applicable.

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

REASON FOR CLOSING OUT INITIATIVE

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

FINAL OUTCOME AND LESSONS LEARNED

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

HC. 2007.01 - REVIEW OF ALTERNATIVE SUBSIDY APPROACHES

REASON FOR CLOSING OUT INITIATIVE

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

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

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

FINAL OUTCOME AND LESSONS LEARNED

Not applicable.

PD.2000.01 - REQUEST FOR REGULATORY RELIEF FOR MIXED FINANCE

REASON FOR CLOSING OUT INITIATIVE

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

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

FINAL OUTCOME AND LESSONS LEARNED

Not applicable.

PD.2008.01 - LIBERATING ASSETS

REASON FOR CLOSING OUT INITIATIVE

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

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

FINAL OUTCOME AND LESSONS LEARNED

Not applicable.

PH.2013.02 - PROJECT-BASED VOUCHER IN PUBLIC HOUSING

REASON FOR CLOSING OUT INITIATIVE

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

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

FINAL OUTCOME AND LESSONS LEARNED

Not applicable.

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

REASON FOR CLOSING OUT INITIATIVE

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

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

FINAL OUTCOME AND LESSONS LEARNED

Not applicable.

SS.2011.01 - CAREER FAMILY OPPORTUNITY PROGRAM (CFO)

REASON FOR CLOSING OUT INITIATIVE

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

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

SUMMARY TABLE OF OUTCOMES

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

FINAL OUTCOME AND LESSONS LEARNED

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

CE.2008.05 - IMPLEMENT NEW INSPECTION PROTOCOL/HCV

YEAR CLOSED OUT: FY15

REASON FOR CLOSING OUT INITIATIVE

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

SUMMARY TABLE OF OUTCOMES

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

FINAL OUTCOME AND LESSONS LEARNED

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

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

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

YEAR PARTIALLY CLOSED OUT: FY16

REASON FOR CLOSING OUT THIS PORTION OF THE INITIATIVE:

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

ACTUAL SOURCES AND USES OF MTW FUNDING

Actual Sources and Uses of MTW Funding for the Fiscal Year

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

Describe the Activities that Used Only MTW Single Fund Flexibility

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

TRANSFERS TO PROGRAM AND ACTIVITIES USING THE BLOCK GRANT

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

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

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

WORKING CAPITAL

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

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

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

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

CAPITAL PROJECTS - GUARANTEES AND TRANSFERS

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

Local Asset Management Plan

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

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

Has the PHA provided a LAMP in the appendix?	Yes

CERTIFICATION: MTW REPORTING COMPLIANCE

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

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

In the interest of maintaining a consistent methodology that complies with HUD requirements under Attachment B, please see data points on **pps 37, and data required in Section II.** CHA certifies the following: -

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

D. N/A.

ADMINISTRATIVE

LOCAL ASSET MANAGEMENT PLAN

AS SUBMITTED IN THE FY19 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.

As of December 31, 2019, the Agency had 344 public housing units and has maintained its local asset management plan consistent with past practices and in line with the MTW Agreement. 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.

FEES EARNED FOR AGENCY SERVICES

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

PUBLIC COMMENTS

Comment 1: p. 11 Staff Trainings, I am pleased the Operations Department has completed their "Resource Guide"which I hope will provide greater consistency among CHA properties. I am very disappointed that tenants were not included in developing the Guide. I hope this is not a new direction because it would minimize tenant input into practices that directly affect them.

CHA Response: CHA believes this is an internal document to assist staff and not a document that requires additional input. CHA is still committed to public feedback on policy documents as outlined in the public process portion of annual plans.

Comment 2: p. 12 Payment Standards. Has a change to SAFMRs resulted in more vouchers placed in Cambridge? Which zip codes have lost or gained vouchers since the change in payment standards?

CHA Response: CHA will work on reporting on this beginning with the upcoming FY21 Plan. That will also allow more time to collect data for a meaningful analysis of SAFMR outcomes.

Comment 3: P. 65. SBV Households receiving Services. To what do you attribute the dramatic increase in the Hard to House numbers, 124 to 393 and 96 to 393?

CHA Response: In the past, the numbers represented vouchers allocated. The numbers now represent number of families served (e.g. 1 Sponsor-based Voucher may serve 3 households). CHA believes the new reporting better represents the requested data.

Comment 4: p. 92 Transition to Market Rent/Public Housing. (RAD Phase 2 will complete soon.)

1. Given the current market rate rents in Cambridge and metro Boston why is this program only for units in Cambridge?
2. Why is implementation timed to completing the RAD transition?
3. Will Formerly PH (Sec.18) tenants be eligible for this program?
4. How will CHA 'choose' households to receive information about this program?
5. What indications are there that this could be successful?

CHA Response: There are no plans to implement this activity and the design questions above would only be considered in the event CHA moves forward with implementation.

Comment 5: I urge the CHA to have a working session meeting for tenants, and the community, to provide an overview of HUD metrics and why/why not they are useful. It is very difficult to understand and comment on these items.

CHA Response: CHA appreciates this comment and is open to an annual metrics meeting on request. This is mentioned as part of the public process schedule in the annual plan. Additionally, CHA recognizes the standard HUD metrics don't always accurately describe success in our MTW activities. CHA has created several agency specific metrics and will continue to do so when possible.

Comment 6: Note: Please add SBV to the definitions page.

CHA Response: CHA appreciates this comment and has made the addition.

BOARD APPROVAL

EXTRACT OF THE MINUTES OF THE REGULAR MEETING OF THE BOARD OF COMMISSIONERS OF THE CAMBRIDGE HOUSING AUTHORITY WEDNESDAY, MARCH 25, 2020 5:30 P.M.

MEMBERS PRESENT: GERARD J. CLARK, CHAIRPERSON
SUSAN T. CONNELLY, TREASURER
VICTORIA BERGLAND, ASSISTANT TREASURER
ELAINE DEROSA, MEMBER

ALSO PRESENT: MICHAEL JOHNSTON, EXECUTIVE DIRECTOR
BRENDA DOWNING, DEPUTY EXECUTIVE DIRECTOR
SUSAN C. COHEN, GENERAL COUNSEL
SHIRLEY SANFORD, RECORDING SECRETARY

SUBMISSION OF FY19 MTW ANNUAL REPORT

Ms. Bergland moved the following motions:

MOTION: Approval of the Moving To Work Deregulation Demonstration Program FY19 Annual Report.

MOTION: 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; and

MOTION: Authorize the submission of the final Report to the US Department of Housing and Urban Development, pursuant to the March 19, 2020 Memorandum from Zach Gordon to Michael J. Johnston, Executive Director.

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

_____
Michael Johnston, Secretary

Attest
Seal