



Moving to Work Annual Plan



Tacoma Housing Authority

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SECTION I: INTRODUCTION AND OVERVIEW

Long-Term MTW Plan

THA has set four long-term goals for its MTW program. They reflect both the MTW statutory objectives and THA's own strategic objectives:

Goal 1: Increase THA's administrative efficiency;

Goal 2: Encourage economic self-sufficiency among THA's participants;

Goal 3: Increase housing opportunities for low-income households residing in THA's jurisdiction by serving more households and more households with special needs; and,

Goal 4: Monitor program effectiveness and performance through a "digital dashboard."

THA looks forward to determining effective uses of MTW authority for these purposes. Some notable examples of its plan appear below. Some of them seem replicable in other places or on a larger scale. When that is the case, we say so **in bold**.

Goal 1: Increase THA's Administrative Efficiency:

THA is eager to explore the full limits of MTW flexibility to make itself a more efficient property manager and manager of programs. THA began its MTW career, for example, focused on reducing unnecessary annual certifications for senior or disabled households, and de-linking annual inspections from annual recertifications so our inspectors can more efficiently cover the geographic spread of units. The fungibility of funds also gives THA more flexibility that has helped assign resources in a more efficient alignment to need. We have also simplified the rent subsidy to a fixed amount. We did this for several reasons. One of them is the greater ease of administration. We are eager to save still more in administration, especially as the federal funding for public housing and the voucher program diminishes.

Goal 2: Encourage Self-Sufficiency among THA's Participants

The MTW statutory objective of economic self-sufficiency for assisted households nicely complements THA's view of supportive services for its residents and voucher families. THA provides supportive services that allow tenants to succeed as tenants. Yet, as its strategic directives contemplate for the non-disabled and non-elderly households with children, THA wants them also to succeed as "parents, students, wage earners, and builders of assets." THA wants them to come into its housing programs and prosper so they can live without assistance. In this way, it wants its housing programs to be a transforming experience for them and for their time with us to be temporary. We seek this certainly for the parents but emphatically for their children. In this way, THA regards itself as more than a landlord and more than a ministerial manager of rental assistance.

THA's long term strategies to get this done include the following:

- Regulatory reform for rent and definition of income to encourage and reward earnings.

THA's previous MTW plans included rent reforms. These changes include five-year time limits for work-able recipients of rental assistance and fixed subsidies to give households a greater incentive to increase their earned income. As its evaluation progresses, THA expects to refine and extend these efforts. **Although effective reforms of this sort must account for local factors, success in one place will be interesting in others. THA has certainly studied the experience of other MTW agencies. If THA is successful, other agencies will study our experience.**

- Supportive Services to Spur Economic Self-Sufficiency

THA seeks to provide supportive services to help families prosper. These efforts strive to keep people in school, get them back to school, get them into job training, teach them English, get job skills, find a job, keep a job, get their drivers' licenses, clean up their credit, save money, and if appropriate buy a house. THA intends to explore how MTW status can get this done better and in a more sustained way. THA, in particular, is interested in finding out if MTW is useful for two types of self-sufficiency initiatives. **First**, we hope that MTW will help THA finance the supportive services and staff these self-sufficiency efforts require. The fungibility of funds that it confers will help do this. **If this works, it will be very interesting to that portion of the affordable housing industry that seeks to provide supportive services.** **Second**, THA seeks to better link its housing resources with the supportive services of other organizations. Such linkage makes both the housing and the services more effective. Such leveraging of effect makes these linkages a very good use of a housing dollar.

- THA's Education Project

THA's Education Project and THA's initial MTW plan to support that project are very good examples of how THA regards its mission and the MTW flexibility this mission requires. The goal of the Education Project is to improve the educational outcomes of the children THA houses or whose families receive its rental assistance, and to improve the outcomes of the public schools that serve THA communities. THA focuses on education for four main reasons. **First**, educational success is an important part of the transformation to self-sufficiency that we seek to promote. **Second**, educational success is a good proxy for other important outcomes that are harder to measure. THA spends considerable time and effort assisting families address problems of drug or alcohol dependency, domestic abuse and other maladies. This work is important. But it is hard to tell if it is effective. Tracking educational outcomes can help. A family afflicted in these ways is likely to be making some progress if its child's reading levels are improving. **Third**, the success of Tacoma's public schools is essential to the success of the communities that THA develops and manages. For example, THA develops mixed-income communities. Their financial and social success for families of all incomes requires the schools that serve them to elicit adequate confidence from parents of school age children. Low-income parents do not have a choice but to enroll their children. Higher income parents may have a choice. The schools need to appeal to all parents. For this reason, THA has a direct stake in the success of those schools. **Fourth**, children who grow up in deep poverty bring challenges to the schoolhouse door that the best-trained teacher in the fanciest classroom cannot overcome. Among the most acute challenges are transience and irregular attendance resulting from homelessness and housing instability.

THA's Education Project started with a surmise that THA can influence school outcomes. This surmise arises from three facts that are probably common to all public housing authorities, especially the urban ones. **First**, except for the school district and the public assistance agency, THA serves more poor children than anyone in the city. THA houses or helps to house 1 out of Tacoma Housing Authority 2015 MTW Plan Amendment
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every 7 public school students in Tacoma. It houses or helps to house one out of every 4.5 low-income public school students. **Second**, in serving them THA is already deep into the lives of their families. It is their landlord. It monitors their compliance with heavily regulated housing programs. It provides them with supportive services. This involvement gives THA influence over their choices and prospects. **Third**, THA as a MTW PHA can direct its housing dollars in ways that can match the needs of its school district and can leverage reform. **Fourth**, THA owns and manages large residential properties with ample community space. These can serve as the staging grounds for the efforts of others, especially those interventions that are most effective when they are part of the visible walking landscape.

THA's Education Project has already received notable national attention from HUD, PHAs, school districts and foundations. The evaluation of these efforts will have an interesting pertinence throughout the nation.

The Education Project has many elements to it. Some do not require MTW status. Most do. Our initial MTW plan launched them. Here are three examples:

Linking Housing Assistance with School Programs: THA's provides housing assistance to homeless families of children enrolled in elementary schools. It has already begun doing this with its McCarver Elementary School Housing Program. See below. In a similar program design, THA is planning to provide rental assistance to homeless students enrolled in Tacoma Community College. The college program conditions the assistance on the student's continued enrollment and satisfactory progress toward a degree.

Matched Savings Accounts (Individual Development Accounts) Linked to Education: THA is planning two uses of Individual Development Accounts (IDA) focused on education. Research from the Corporation for Enterprise Development (CFED) reports that even a modest balance in such an account allows the child and his or her family to think more positively about the future. According to CFED, children with IDA accounts are much more likely to go to college. THA seeks to take advantage of this experience, in two ways. **First**, THA will create a Children's Matched Savings Account for children enrolled in an elementary school kindergarten. The program will match each family's contribution to the account, up to \$500 each year through 5th grade. **Second**, starting in 6th grade, the children will start THA's Scholars Incentive Program (SIP). Each 6th grader, with the help of a counselor, will devise an individualized plan through high school, with milestones along the way. The milestones will be academic in nature (e.g, attendance rate, grad point average, taking college prep courses, taking the PSAT, SAT and Act, signing up for Washington State's College Bound Scholarship, applying to post-secondary institutions, getting in, graduating from high school and enrolling in a post-secondary program.) Upon the student meeting each milestone, the program will make two payments. One will be a small cash payment to the student. The other will be a deposit in the IDA account for the student. The balance in the account will grow as the student hits each milestone. He or she will have access to the balance when and if he or she completes the journey and then only for post-secondary educational purposes. The balance should be adequate to fund college when coupled with Washington State's College Bound Scholarship (CBS) Program. The CBS program ensures that low-income students enrolling in post-secondary educational programs can afford tuition. A student and his or her parent or guardian must enroll in the CBS Program by the end of his or her eighth grade. (Enrolling THA's eighth graders yearly is another part of THA's Education Project. Presently 100% are signing up yearly! The Bill & Melinda Gates Foundation, the Cargill Foundation and the Bamford Foundation are helping to fund this effort.

McCarver Elementary School Initiative: THA spent more than a year planning this innovative effort to reform an underperforming public elementary school. McCarver's student population is among the poorest in the state. It has the most homeless students of any elementary school in the region, probably the state. Notably, more than 100% of its student population turned over during each school year. In some years the turnover rate approaches 200%. This instability arises from deep poverty, homelessness and the accompanying family challenges. The research literature shows that this turnover has a ruinous effect on school outcomes of the children who come and go and for their classmates who must sit there and watch it happen. THA's McCarver Elementary School Initiative has five elements: (i) THA is using rental assistance to help stabilize the school. It is providing rental assistance for up to 50 McCarver families who were homeless or at risk of homelessness and who had a child enrolled in kindergarten, first or second grade at the program's inception. Their children comprise about a fifth of the school population. This assistance lasts as long as their children are enrolled in McCarver, for a maximum of five years. (ii) Participating families agree to some important commitments. They commit to keep their children at McCarver. They commit to the various ways that parents can support their children's school success (e.g, get their children to school on time every day, attend parent-teacher-student conferences, attend PTA meetings, read to their children, make homework time and homework space available every evening). Parents commit to invest in their own educational and employment prospects. (iii) A robust range of services from thirty non-profit partners and THA's caseworkers stationed at the school help the parents do all this. (iv) The school district also committed to important investments. The school district has embraced this initiative fully. In particular, it has committed the investment to turn McCarver into an International Baccalaureate Primary Program. This will greatly raise academic standards for both teachers and students. (v) The fourth element is a detailed third party evaluation to track a variety of metrics. Funds from the Bill & Melinda Gates Foundation and local government support this initiative.

Goal 3: Increase Housing Opportunities for Low-income Households Residing in THA's Jurisdiction by serving more households and more households with special needs

To increase housing opportunities for low-income households in Tacoma, THA is trying the following activities:

- Serve More Households

THA uses its MTW flexibility and efficiencies to allow it to serve more households. Several examples of how we do this bear mention. **First**, THA's changes in how we calculate the rent subsidy in our rental assistance program means individual subsidies for some families are smaller than they would otherwise be. This savings allows THA to serve more families. Similarly, savings in administrative costs will have the same effect. MTW fungibility also allows THA to redirect savings in HAP expenditures to sustain public housing operations. **Second**, THA's five year limit on the duration of rental assistance for work-able persons will give more people a turn sooner to receive assistance when they otherwise would wait longer on our waiting lists. **These strategies should be available to other PHAs.**

- Serve Households Otherwise Shut Out of THA Programs

THA is using its MTW authority to use lessons we learn from HUD and the Bill & Melinda Gates Foundation on how to use rapid re-housing strategies to stabilize homeless families with children.
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Homeless families presently find THA's HUD funded programs inaccessible. If they come to THA's door they would find a long waiting list that is often not even taking new applicants. Even if they could apply, the wait would be years. Even if THA gave them a voucher on the spot, they would still be a month away from housing while they found a landlord, had the unit inspected, and moved in. Homeless youth have these challenges as well, plus the added one that comes from being young. Moreover, a voucher is an inefficient way to intervene into family homelessness, in two ways. First, there is no reliable way to tell which family will become or remain homeless without assistance. Second, 85% of homeless families do not need deep permanent subsidies to stabilize. Research from HUD and other places report that a lower subsidy for up to 6 months would be sufficient. In response, THA has signed contracts with its county government to redirect up to 3% (\$1 million) of its MTW dollars to the county's rapid-rehousing program serving homeless families and youth. For example, redirecting \$1 million will mean THA will serve about 130 fewer households on its regular rental assistance program. But it will allow the rapid-rehousing program to stabilize 300 – 350 homeless families with children, or about 30% of the homeless families who seek assistance in our city. THA signed a similar contract to serve homeless youth without families.

- Increase Housing Supply

MTW status will allow THA to project base more vouchers. This is an important development strategy that allows THA and other nonprofit developers to finance the construction of new housing, to preserve existing affordable housing, and to ensure the long term affordability of both types. THA has used this to very good effect in Tacoma, e.g., Eliza McCabe Homes (Intercommunity Mercy Housing), Hillside Gardens (same), Guadalupe Vista (Catholic Community Services), Harbor View Manor (ABHOW), New Look Apartments (MLK Housing Development Association). Banks have learned how to lend against the long-term rental stream that a long term HAP contract denotes. This financing not only gets the housing built but also makes it affordable to households down to zero income. It also locks in this deep affordability for a long time. Additionally, these arrangements usually leverage supportive services as well. In all these ways, project-basing is a very good use of a housing dollar and MTW will allow THA to do more of it. **This use of project basing vouchers should also be applicable in other jurisdictions.**

- Increase housing throughout the continuum of need for persons with special needs

THA is very interested in using its MTW status to provide housing and services along more parts of the housing continuum. Generally, THA has been focused on providing permanent housing to households headed by adults capable of living independently, perhaps with light assistance. THA is interested in better providing or arranging more intensive supportive services to serve a wider variety of needs.

The effort to do this elicits an important feature of how THA views supportive services generally. In general, there are two views of supportive services in the affordable housing industry. By one view, supportive services are a sideshow. They are interesting but, by this view, the housing provider has no particular role in providing them. According to this view, housing providers are primarily landlords. In contrast, THA, and most MTW agencies, have a different view. It goes like this: supportive services are a necessary companion to the housing they provide. Their necessity derives from whom we house, and why. We house some of our community's neediest households – seniors aging in place, disabled persons trying to live independently, and families coming from

trauma, such as homelessness and domestic violence. These households need help to succeed as tenants.

THA provides considerable services for these purposes. It seeks to do more. MTW flexibility will make this easier to do in the following possible ways:

Sustainable Source of Funding for Services: THA looks forward to finding out if the financial flexibility and efficiencies that MTW allows will make it easier to fund supportive services within a building from the operating funds assigned to that building. As HUD realizes, regarding supportive services as an “above the line” expense for a building is the elusive ambition of all housing providers interested in supportive services. Perhaps MTW flexibility will make this more attainable. **If MTW provides this ability to sustain supportive services then it would greatly interest many other PHAs.**

Homeless Youth: Tacoma has a serious and growing problem of homelessness among unaccompanied youth. These youth are not with families or any other adults. They are not in foster care. They are not in school. They constitute a first rate child welfare disaster for our community. Using state funds, and in collaboration with service partners, THA participates in an “Independent Youth Program” that serves these youth. THA provides the rental assistance and partners provide the wrap around services. It is a very good model. However, the state funds are ending. Unfortunately, except for a limited number of FUP vouchers, THA’s mainline federal housing resources are not well designed to be helpful in such programs. THA will be very interested in finding out if MTW flexibility will better equip THA to participate in a collaborative community response to this growing emergency. For example, using MTW flexibility, THA has signed a contract with its county to fund a rapid rehousing program for these young persons. THA is also participating with Washington State’s child welfare agency to provide rental assistance to teenagers aging out of foster care and who would otherwise face homelessness. **Most other cities see a significant population of homeless, unaccompanied youth. A successful model of intervention would interest many other PHAs.**

Disaster Relief: THA had an interesting and frustrating experience during the Hurricane Katrina disaster that makes it eager for MTW flexibility so it can be more helpful with the next disaster. Hurricane Katrina caused the largest loss of housing from a single event in American history. Afterward, the South Puget Sound area received several hundred families from the Gulf Coast. THA helped to coordinate the effort to receive them. The FEMA assistance never proved very effective. THA, and other providers, filled in as best as their program rules permitted. THA wrote about the experience in a report: *THA Review of Its Katrina Relief Plan 2006 (THA 2006)*. It is available at <http://www.tacomahousing.org/about/reports.html>. As the report makes clear, although THA did help several dozen households, its federal rules were not flexible enough to respond effectively or quickly. THA means to find out how MTW will better equip its ability to respond to the next disaster. **Whether PHAs can or should become sources of emergency assistance in a mass disaster is a question that will surely recur with the next calamitous hurricane, earthquake or flood. Innovative answers should interest the entire PHA community.**

People Coming from Correctional or Psychiatric Institutions: The Tacoma area has more than its full share of people discharged from correctional institutions and psychiatric institutions. (It is home to large correctional institutions, including the state’s only women’s prison. It is also home to the state’s largest psychiatric hospital.). As HUD knows well, people discharged from these places

have serious housing needs. They are also among the hardest to house. It is clear that the normal programmatic templates are not suited to the challenge. THA intends to examine its role in fulfilling this need. MTW flexibility will no doubt be very useful, especially in partnerships with service providers, rules of occupancy, and terms of assistance. **Many successful models exist to effectively serve these difficult populations. It is a separate question how mainline federal housing programs like public housing and the Housing Choice Voucher program could or should adapt to the purpose. Effective answers will be interesting and transferable to many other PHAs.**

Drug or Alcohol Dependent and/or Mentally Ill Adults: People afflicted with drug or alcohol dependency present a housing challenge that also requires flexibility that MTW may provide. For example, THA is using its MTW authority to project base vouchers into Nativity House that Catholic Community Services is building in Tacoma to house and serve this population and MDC's new Randall Townsend Home for chronically homeless adults.

Goal 4: Monitor Program Effectiveness and Performance through a “Digital Dashboard.”

THA is in the process of designing a digital dashboard to track the various performance measures it will choose for its strategic objectives and operations. We mention this separately because it will be a critical tool in assessing MTW effectiveness, as well as overall agency success. Even at this time, however, THA has a detailed list of metrics to track. Baselines have already been established for most activities and methods put in place to extract the required data from THA's various systems.

The purpose of the digital dashboard is to place various performance measures and the results front and center. Some performance measures most pertinent to MTW will include changes in the following:

- Earned income among various work-able populations
- Savings rates
- Educational outcomes
- Number of households of various subpopulations served
- Various metrics indicating housing stability
- Per unit costs of operations
- Per voucher cost of operations
- Metrics of individual properties and portfolio aggregates (vacancy rates, unit turns, work orders, rent collections, turnover rates, maintenance expenses, etc.)

A successful dashboard will allow staff to see the “needle” or gauge change as they succeed or fail at their work. It will place the important measures prominently in view. This system will change department meetings, cabinet meetings and board meetings. The focus of these meetings can then be where it belongs - on how we are doing and why or why not. This in turn will become a valuable source of data for program design – exactly what a creative MTW agency needs in order to make good use of MTW flexibility.

An effective digital dashboard should be applicable to nearly every other PHA. They collect or should collect similar data. They should value similar performance measures. They share with all organizations a pressing need for a greater focus on outcomes.

In November 2014, THA purchased an online dashboard product called iDashboard. Using iDashboard, THA will load all of the metrics its Board of Commissioners chooses as part of the agency's strategic planning effort. We anticipate that the Board will approve the performance metrics in the first quarter of 2015 but IT staff have already begun work building the dashboard for both internal and external use. Additionally, THA is in the midst of an enterprise software procurement and anticipates going live with the new software by the end of 2015. The new software package will accommodate the iDashboard product.

Short-Term MTW Plan

THA's short-term goals with this year's plan continue implementation of activities and changes that meet both the agency's long-term goals and mission statement. Highlights from this year's plan include the expansion of THA's education programs. This expansion will serve homeless students in additional elementary schools and post-secondary schools. In collaboration with other local PHAs looking to implement time limits and fixed subsidies in order to save dollars and help families become economically self-sufficient, THA will spend the next year exploring alternative rent reform models for our work-able families. The research and analyses will include best practices for community services delivery models, redefining "work-able," analyzing the effects that time limits and fixed subsidies will have on shelter burden and also, how these changes will affect the composition of our properties. THA will also take units offline for modernization as needed. Examples of this would be units that have flooded or had large amounts of damage.

Overall, THA has a collection of activities that meet the MTW program goals of spending federal dollars more efficiently, helping residents find employment and become self-sufficient, and increasing housing choices for low-income persons, especially those in crisis and those not well served by HUD's mainline programs.

SECTION II: GENERAL THA OPERATING INFORMATION

| A. MTW Plan: Housing Stock Information | | | | | | | | | | | |
|--|-------------------------------|------------|-------------------------|---|---|---|----|-------------|-------------------|------------------|-----------|
| Planned New Public Housing Units to be Added During the Fiscal Year | | | | | | | | | | | |
| AMP Name and Number | Bedroom Size | | | | | | | Total Units | Population Type * | # of UFAS Units | |
| | 0 | 1 | 2 | 3 | 4 | 5 | 6+ | | | Fully Accessible | Adaptable |
| PIC Dev. # /AMP PIC Dev. Name | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | Type Noted * | 0 | 0 |
| PIC Dev. # /AMP PIC Dev. Name | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | Type Noted * | 0 | 0 |
| PIC Dev. # /AMP PIC Dev. Name | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | Type Noted * | 0 | 0 |
| PIC Dev. # /AMP PIC Dev. Name | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | Type Noted * | 0 | 0 |
| Total Public Housing Units to be Added | | | | | | | | 0 | | | |
| * Select Population Type from: Elderly, Disabled, General, Elderly/Disabled, Other | | | | | | | | | | | |
| If Other, please describe: | | | | | | | | | | | |
| Planned Public Housing Units to be Removed During the Fiscal Year | | | | | | | | | | | |
| PIC Dev. # / AMP and PIC Dev. Name | Number of Units to be Removed | | Explanation for Removal | | | | | | | | |
| ALL* ALL Public Housing | 809 | | RAD Conversion | | | | | | | | |
| WA005000006 Scattered Sites | 34 | | Section 32 Disposition | | | | | | | | |
| N/A N/A | 0 | | N/A | | | | | | | | |
| Total Number of Units to be Removed | | 843 | | | | | | | | | |

***ALL Public Housing includes the following PIC Development Numbers and Names:**

- | | |
|--|---|
| WA005000007 Hillside I WA005000008 Hillside II WA005000009 Hillside Terrace 1500 Block WA005000010 Salishan One WA005000011 Salishan Two WA005000012 Salishan Three WA005000013 Salishan Four WA005000014 Salishan Five WA005000015 Salishan Six | WA005000001 K Street WA005000001 G Street WA005000001 Wilson 77 WA005000002 Fawcett 30 WA005000002 Wright 58 WA005000002 6th Ave WA005000003 Ludwig WA005000003 Bergerson Terrace WA005000003 Dixon Village |
|--|---|

| New Housing Choice Vouchers to be Project-Based During the Fiscal Year | | | |
|--|--|--|-------------|
| Property Name | Anticipated Number of New Vouchers to be Project-Based * | Description of Project | |
| Nativity House | 50 | Permanent Supportive Housing | |
| New Tacoma 2 | 12 | Housing for homeless seniors | |
| Randall Townsend | 10 | Permanent Supportive Housing for homeless veterans (pending PBV VASH application) | |
| HA Public Housing* | 809 | THA plans to convert 809 Public Housing units to Project Based Vouchers through a RAD conversion. | |
| Anticipated Total New Vouchers to be Project-Based | 881 | Anticipated Total Number of Project-Based Vouchers Committed at the End of the Fiscal Year | 1557 |
| | | Anticipated Total Number of Project-Based Vouchers Leased Up or Issued to a Potential Tenant at the End of the Fiscal Year | 699 |

*New refers to tenant-based vouchers that are being project-based for the first time. The count should only include agreements in which a HAP agreement will be in place by the end of the year. **The property names for THA Public Housing are listed in THA's 2015 Plan.

| Other Changes to the Housing Stock Anticipated During the Fiscal Year | |
|---|--|
| Explanation for 699 out of 1,557 as the anticipated total number of project-based vouchers committed at the end of the fiscal year: THA anticipates converting its 809 remaining public housing units to RAD pending an increase to the RAD cap or reaching the top of the RAD waiting list. 809 units may not be converted in 2015, it will be depend on RAD. 12 New Tacoma PBVs may not be leased or online in 2015. THA is accounting for a 5% vacancy rate in the remainder of the portfolio as this is the average vacancy rate for rental properties in Tacoma. | |
| THA anticipates disposing of its 34 scattered site public housing units to affordable homeownership opportunities through a Section 32 disposition. | |
| N/A | |

Examples of the types of other changes can include but are not limited to units that are held off-line due to the relocation of residents, units that are off-line due to substantial rehabilitation and potential plans for acquiring units.

****THA Public Housing includes the following property names:**

Hillside I
Hillside II
Hillside Terrace 1500 Block
Salishan One
Salishan Two
Salishan Three
Salishan Four
Salishan Five
Salishan Six

K Street
G Street
Wilson 77
Fawcett 30
Wright 58
6th Ave
Ludwig
Bergerson Terrace
Dixon Village

General Description of All Planned Capital Fund Expenditures During the Plan Year

Planned capital expenditures for 2015 are subject to change depending on the outcome of the pending and planned disposition application for 34 scattered sites. Capital expenditures for the scattered sites are expected in 2015 to prepare units for homeownership. THA anticipates approval of disposition through Section 32 for these units. THA conducted a Physical Needs Assessment of all 34 Scattered Sites. The PNA identified roughly \$350,000 in capital needs for years 1-5. THA intends to rehab unit's needs identified in the PNA through year 5. This work is primarily cosmetic and includes items such as new carpets, interior paint, water heater replacement, bathtub acrylic replacement, concrete entry landing maintenance, minor roof shingle repair and appliance replacement in select units.

Planned capital expenditures for 2015 are subject to change also depending upon the outcome of THA's RAD application and conversion of the portfolio to Project Based Vouchers. If THA's RAD application reaches the top of the waiting list, or the cap is lifted, 50% of THA's properties will be converted to RAD within a year and the other 50% the following year. Note that public housing units converted to PBV assistance under RAD will no longer receive separate capital funds. There will be 2015 capital expenditures for the immediate needs identified in the Rental Assistance Demonstration "Physical Conditions Assessments." The immediate needs capital fund expenditures will be for the Salishan and Hillside properties in 2015.

B. MTW Plan: Leasing Information

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

| MTW Households to be Served Through: | Planned Number of Households to be Served* | Planned Number of Unit Months Occupied/Leased*** |
|---|--|--|
| Federal MTW Public Housing Units to be Leased | 843 | 10116 |
| Federal MTW Voucher (HCV) Units to be Utilized | 3696 | 44352 |
| Number of Units to be Occupied/Leased through Local, Non-Traditional, MTW Funded, Property-Based Assistance Programs ** | 24 | 288 |
| Number of Units to be Occupied/Leased through Local, Non-Traditional, MTW Funded, Tenant-Based Assistance Programs ** | 120 | 14400 |
| Total Households Projected to be Served | 4683 | 69156 |

* Calculated by dividing the planned number of unit months occupied/leased by 12.

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

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

Reporting Compliance with Statutory MTW Requirements

If the PHA has been out of compliance with any of the required statutory MTW requirements listed in Section II(C) of the Standard MTW Agreement, the PHA will provide a narrative discussion and a plan as to how it will return to compliance. If the PHA is currently in compliance, no discussion or reporting is necessary.

THA is currently in compliance with the three required statutory MTW requirements.

Description of any Anticipated Issues Related to Leasing of Public Housing, Housing Choice Vouchers and/or Local, Non-Traditional Units and Possible Solutions

| Housing Program | Description of Anticipated Leasing Issues and Possible Solutions |
|---------------------------------|---|
| Public Housing | Public Housing occupancy may be disrupted during RAD conversion as we transition those units to PBV and/or secure resources to make capital repairs. Section 32 disposition for the scattered sites will cause disruption while THA transfers households to comparable Public Housing units. Residents will first be offered the opportunity to purchase the unit in which they live. They may also be offered a Housing Choice Voucher. |
| Housing Choice Voucher Program | THA does not anticipate any issues related to leasing in the Housing Choice Voucher program. |
| Local, Non-traditional Programs | THA currently invests MTW dollars into two of the county's rapid rehousing programs. Over the past year, the rapid rehousing providers have expressed difficulty in expending all of THA's funds for multiple reasons. Most notably, there are not enough eligible providers within Tacoma's jurisdiction to fully allocate the funds. THA is working with the county to address the issues related to expending THA dollars, including relaxing the jurisdiction in which THA funds can be used. |

C. MTW Plan: Wait List Information

| Wait List Information Projected for the Beginning of the Fiscal Year | | | | |
|---|--|-----------------------------------|---|--|
| Housing Program(s) * | Wait List Type** | Number of Households on Wait List | Wait List Open, Partially Open or Closed*** | Are There Plans to Open the Wait List During the Fiscal Year |
| Housing Opportunity Program (Federal MTW Housing Choice Voucher Program) | Community wide | 800 | Closed | No |
| Rapid Rehousing (Non-Traditional Housing Assistance Program) | Other: Pierce County Centralized Intake | 145 | Open | NA |
| Youth Housing (Non-Traditional Housing Assistance Program) | Other: Pierce County Centralized Intake | 233 | Open | NA |
| College Housing Assistance Program (Federal MTW Housing Choice Voucher Program) | Other: Tacoma Community College Students | 68 | Closed | Yes |
| Public Housing (Combined Tenant-Based and Project-Based Local, Non-Traditional MTW Housing Assistance) | Site Based/Merged | 6460 | Open | NA |
| Bay Terrace (non-PH, non-PBV units, Non-Traditional MTW Housing Units) | NA | NA | NA | NA |
| <i>Rows for additional waiting lists may be added, if needed.</i> | | | | |
| * <i>Select Housing Program</i> : Federal MTW Public Housing Units; Federal MTW Housing Choice Voucher Program; Federal non-MTW Housing Choice Voucher Units; Tenant-Based Local, Non-Traditional MTW Housing Assistance Program; Project-Based Local, Non-Traditional MTW Housing Assistance Program; and Combined Tenant-Based and Project-Based Local, Non-Traditional MTW Housing Assistance Program. | | | | |
| ** <i>Select Wait List Types</i> : Community-Wide, Site-Based, Merged (Combined Public Housing or Voucher Wait List), Program Specific (Limited by HUD or Local PHA Rules to Certain Categories of Households which are Described in the Rules for Program Participation), None (If the Program is a New Wait List, Not an Existing Wait List), or Other (Please Provide a Brief Description of this Wait List Type). | | | | |
| *** For Partially Open Wait Lists, provide a description of the populations for which the waiting list is open. | | | | |
| N/A | | | | |
| N/A | | | | |
| N/A | | | | |

SECTION III: PROPOSED MTW ACTIVITIES

THA proposed the following activity to HUD in its 2015 MTW Plan. After deliberation with the MTW office, the activity was removed from the Plan. The activity will not be implemented.

| Proposed MTW Activities | | | |
|--|--|----------------------------|--------------------------|
| Proposed MTW Activity | Statutory Objective | | |
| | Reduce Cost and Achieve Greater Cost Effectiveness | Encourage Self-Sufficiency | Increase Housing Choices |
| Calendar Year 2015 (January 1, 2015 to December 31 , 2015) | | | |
| 25. Alternative Reaction to Insufficient Funding | | | X |

25. Alternative Method for Reacting to Insufficient Funding Activity

Description of MTW activity:

Current regulations allow housing authorities to terminate HAP contracts in the event of insufficient funding. THA would amend its Administrative Plan to allow the agency to implement immediate MTW rent reform in the form of the Housing Opportunity Program (HOP) as an alternative to terminating households. THA has never terminated any family from its programs for lack of funding. It does not wish to start.

Specifically, THA would amend the *Insufficient Funding* portion of its Administrative Plan to allow for immediate MTW rent reform. THA would also amend its Administrative Plan to reflect the methodology it would use to determine insufficient funding. Based on the adopted methodology, THA would conduct an impact analysis to determine the necessary program cuts. Before implementation of any new rent reform, THA would go through the public consultation process to reflect the expansion of the HOP activity.

This revision would allow THA to continue to serve the same number of households every year, despite funding cuts. THA would report on the number of households that did not have to be removed from programs as number of housing units preserved.

Relation to statutory objective:

This activity will allow THA to increase/preserve housing choices for families that might otherwise lose their rental assistance.

Anticipated impact:

THA projects that this activity will allow THA to continue to serve the same number of families and maintain financial stability without terminating families.

Anticipated schedule:

THA will implement this activity upon approval from HUD.

Baselines, Benchmarks and Metrics:

THA has chosen the following metrics out of the HUD standard metrics menu. Baseline data would be determined based on the level of any funding shortfall. Benchmark and outcome data would reflect the current number of households served at the time of the funding cut.

| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmarks Achieved? |
|--|----------|-----------|---------|----------------------|
| HC # 2: Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase). If unit reach a specific type of household, give that type in this box. | TBD | TBD | TBD | TBD |

Data Source:

THA would report on the number of families that did not have to be removed from programs as number of housing units preserved. This would be tracked with our VisualHomes software.

Agency's Board approval of policy:

This policy will go to the board at the September 2014 board meeting.

Description of Authorization or Regulation Waived:

TBD: pending guidance from HUD and the MTW Office.

Impact Analysis:

THA has conducted multiple impact analyses to analyze the conversion of all work-able HCV program participants to HOP. Most recently, THA looked at this conversion on multiple timelines. The first analysis shows the potential impacts of converting all households to HOP on a single day. The subsequent analysis conveys the potential impacts of converting households during the month of a household's recertification month.

If THA exercised this alternative reaction to insufficient funding, it would conduct additional impact analyses. The number of households to be affected by this activity is dependent upon the amount of the budget shortfall.

HOP conversion on a single day:

Household Rent Changes

| Change in Tenant Rent | All HHs | | ORINC < \$5,000 | | Work-Able HHs | | Elderly/Disabled HHs | |
|--|-------------|---------------|-----------------|--------------|---------------|--------------|----------------------|--------------|
| | # Tenants | %Total | # Tenants | %Total | # Tenants | %Total | # Tenants | %Total |
| # Total Households | 2607 | 100.0% | 264 | 10.1% | 1476 | 63.3% | 1032 | 41.2% |
| # Households whose Tenant Rent decreased | 677 | 23.0% | 0 | 0.0% | 361 | 23.3% | 228 | 21.8% |
| Difference of \$0 to -\$5 | 43 | 1.9% | 0 | 0.0% | 18 | 1.2% | 30 | 2.9% |
| Difference of -\$5 to -\$15 | 13 | 0.6% | 0 | 0.0% | 6 | 0.4% | 7 | 0.7% |
| Difference of -\$15 to -\$25 | 22 | 0.9% | 0 | 0.0% | 11 | 0.7% | 11 | 1.1% |
| Difference of -\$25 to -\$50 | 96 | 3.8% | 0 | 0.0% | 48 | 3.3% | 48 | 4.7% |
| Difference of -\$50 to -\$75 | 30 | 1.2% | 0 | 0.0% | 12 | 0.8% | 18 | 1.7% |
| Difference of -\$75 to -\$100 | 95 | 3.8% | 0 | 0.0% | 51 | 3.6% | 44 | 4.3% |
| Difference of -\$100 to -\$125 | 71 | 2.8% | 0 | 0.0% | 52 | 3.6% | 19 | 1.8% |
| Difference of -\$125 to -\$150 | 19 | 0.8% | 0 | 0.0% | 13 | 0.9% | 6 | 0.6% |
| Difference of -\$150 to -\$175 | 24 | 1.0% | 0 | 0.0% | 14 | 0.9% | 10 | 1.0% |
| Difference of -\$175 to -\$200 | 12 | 0.6% | 0 | 0.0% | 6 | 0.4% | 6 | 0.6% |
| Difference < -\$200 | 147 | 6.9% | 0 | 0.0% | 120 | 8.1% | 27 | 2.6% |
| # Households whose Tenant Rent did not change | 3 | 0.1% | 1 | 0.4% | 2 | 0.1% | 1 | 0.1% |
| # Households whose Tenant Rent increased | 1927 | 78.9% | 263 | 99.8% | 1122 | 78.1% | 806 | 78.0% |
| Difference of \$0 to \$5 | 11 | 0.4% | 0 | 0.0% | 3 | 0.2% | 3 | 0.3% |
| Difference of \$5 to \$15 | 65 | 2.8% | 0 | 0.0% | 52 | 3.6% | 13 | 1.3% |
| Difference of \$15 to \$25 | 29 | 1.2% | 0 | 0.0% | 7 | 0.6% | 22 | 2.1% |
| Difference of \$25 to \$50 | 110 | 4.4% | 2 | 0.8% | 39 | 2.8% | 71 | 6.9% |
| Difference of \$50 to \$75 | 137 | 6.6% | 0 | 0.0% | 79 | 6.4% | 58 | 6.8% |
| Difference of \$75 to \$100 | 138 | 6.6% | 4 | 1.8% | 83 | 6.8% | 55 | 6.2% |
| Difference of \$100 to \$125 | 163 | 8.6% | 8 | 3.1% | 69 | 4.7% | 94 | 9.1% |
| Difference of \$125 to \$150 | 158 | 8.3% | 3 | 1.2% | 74 | 6.0% | 84 | 8.1% |
| Difference of \$150 to \$175 | 155 | 8.2% | 11 | 4.3% | 72 | 4.9% | 83 | 8.0% |
| Difference of \$175 to \$200 | 205 | 8.2% | 37 | 14.8% | 119 | 8.1% | 86 | 8.3% |
| Difference > \$200 | 756 | 30.2% | 188 | 74.0% | 555 | 37.8% | 201 | 19.6% |

Projected Impact by Race and Family Size

Impact by Race

All units
 Rent increase
 Rent increase > \$50
 Rent decrease
 Shelter burden (current)
 Shelter burden (expected)
 Shelter burden change
 Number of Units

| | African American | Caucasian | Hawaiian or Pac Isl | Asian | Amer Indian or Alask | Hispanic |
|---------------------------|------------------|-----------|---------------------|--------|----------------------|----------|
| All units | 40.48% | 44.16% | 1.48% | 4.43% | 1.79% | 5.70% |
| Rent increase | 78.42% | 75.07% | 78.38% | 75.68% | 73.33% | 81.82% |
| Rent increase > \$50 | 71.23% | 64.50% | 72.97% | 72.97% | 60.00% | 74.13% |
| Rent decrease | 21.48% | 24.84% | 21.62% | 24.32% | 26.67% | 18.18% |
| Shelter burden (current) | 27.80% | 27.51% | 28.43% | 27.39% | 28.21% | 28.57% |
| Shelter burden (expected) | 37.61% | 35.68% | 38.95% | 35.48% | 35.69% | 41.21% |
| Shelter burden change | 9.82% | 8.17% | 10.52% | 8.25% | 7.48% | 12.63% |
| Number of Units | 1016 | 1107 | 37 | 111 | 46 | 143 |

Breakdown by # Members

All units
 Rent increase
 Rent increase > \$50
 Rent decrease
 Shelter burden (current)
 Shelter burden (expected)
 Shelter burden change
 Number of units

| | 1 | 2 | 3 | 4 | 5 | 6 | 7+ |
|---------------------------|--------|--------|--------|--------|--------|--------|--------|
| All units | 38.81% | 20.10% | 17.31% | 8.62% | 8.36% | 3.71% | 2.99% |
| Rent increase | 78.99% | 69.84% | 79.49% | 78.24% | 77.48% | 80.65% | 72.31% |
| Rent increase > \$50 | 69.58% | 60.32% | 69.32% | 67.13% | 75.23% | 75.27% | 70.77% |
| Rent decrease | 20.97% | 30.16% | 20.51% | 21.80% | 22.52% | 19.35% | 27.69% |
| Shelter burden (current) | 27.27% | 27.35% | 28.07% | 28.36% | 27.89% | 28.61% | 27.92% |
| Shelter burden (expected) | 38.11% | 33.95% | 37.10% | 34.67% | 38.44% | 41.96% | 36.42% |
| Shelter burden change | 10.84% | 6.60% | 9.03% | 6.31% | 10.55% | 13.34% | 8.50% |
| Number of units | 973 | 504 | 434 | 216 | 222 | 93 | 65 |

HOP conversion phased in at recertification month:

Household Rent Changes

(note: same results as scenario 5 as changes calculated as of rents at end of implementation year)

| Change in Tenant Rent | All HHS | | QRINC < \$6,000 | | Work-Able HHS | | Elderly/Disabled HHS | |
|---|-----------|--------|-----------------|--------|---------------|--------|----------------------|--------|
| | # Tenants | %Total | # Tenants | %Total | # Tenants | %Total | # Tenants | %Total |
| # Total Households | 2607 | 100.0% | 264 | 10.1% | 1476 | 68.2% | 1022 | 41.2% |
| # Households whose Tenant Rent decreased | 677 | 23.0% | 0 | 0.0% | 261 | 23.2% | 228 | 21.9% |
| Difference of \$0 to -\$5 | 43 | 1.9% | 0 | 0.0% | 15 | 1.2% | 30 | 2.9% |
| Difference of -\$5 to -\$15 | 13 | 0.6% | 0 | 0.0% | 6 | 0.4% | 7 | 0.7% |
| Difference of -\$15 to -\$25 | 22 | 0.9% | 0 | 0.0% | 11 | 0.7% | 11 | 1.1% |
| Difference of -\$25 to -\$50 | 96 | 3.8% | 0 | 0.0% | 43 | 3.0% | 43 | 4.7% |
| Difference of -\$50 to -\$75 | 30 | 1.2% | 0 | 0.0% | 12 | 0.8% | 15 | 1.7% |
| Difference of -\$75 to -\$100 | 95 | 3.8% | 0 | 0.0% | 51 | 3.6% | 44 | 4.3% |
| Difference of -\$100 to -\$125 | 71 | 2.8% | 0 | 0.0% | 52 | 3.6% | 19 | 1.8% |
| Difference of -\$125 to -\$150 | 19 | 0.8% | 0 | 0.0% | 13 | 0.9% | 6 | 0.8% |
| Difference of -\$150 to -\$175 | 24 | 1.0% | 0 | 0.0% | 14 | 0.9% | 10 | 1.0% |
| Difference of -\$175 to -\$200 | 12 | 0.6% | 0 | 0.0% | 6 | 0.4% | 6 | 0.8% |
| Difference < -\$200 | 147 | 6.9% | 0 | 0.0% | 120 | 8.1% | 27 | 2.8% |
| # Households whose Tenant Rent did not change | 3 | 0.1% | 1 | 0.4% | 2 | 0.1% | 1 | 0.1% |
| # Households whose Tenant Rent increased | 1927 | 78.9% | 263 | 99.8% | 1122 | 78.1% | 806 | 78.0% |
| Difference of \$0 to \$5 | 11 | 0.4% | 0 | 0.0% | 3 | 0.2% | 3 | 0.3% |
| Difference of \$5 to \$15 | 65 | 2.8% | 0 | 0.0% | 52 | 3.6% | 13 | 1.3% |
| Difference of \$15 to \$25 | 29 | 1.2% | 0 | 0.0% | 7 | 0.5% | 22 | 2.1% |
| Difference of \$25 to \$50 | 110 | 4.4% | 2 | 0.8% | 39 | 2.8% | 71 | 8.9% |
| Difference of \$50 to \$75 | 137 | 6.6% | 0 | 0.0% | 79 | 6.4% | 58 | 6.8% |
| Difference of \$75 to \$100 | 138 | 6.6% | 4 | 1.8% | 53 | 3.8% | 55 | 6.2% |
| Difference of \$100 to \$125 | 163 | 6.6% | 2 | 1.1% | 69 | 4.7% | 94 | 9.1% |
| Difference of \$125 to \$150 | 158 | 6.3% | 3 | 1.2% | 74 | 6.0% | 34 | 3.1% |
| Difference of \$150 to \$175 | 155 | 6.2% | 11 | 4.3% | 72 | 4.9% | 33 | 3.0% |
| Difference of \$175 to \$200 | 205 | 8.2% | 37 | 14.8% | 119 | 8.1% | 36 | 3.3% |
| Difference > \$200 | 756 | 30.2% | 122 | 74.0% | 555 | 37.8% | 201 | 19.6% |

Projected Impact by Race and Family Size

(note: same results as scenario 5 as changes calculated as of rents at end of implementation year)

Impact by Race

| | African American | Caucasian | Hawaiian or Pac Isl | Asian | Amer Indian or Alaska | Hispanic |
|---------------------------|------------------|-----------|---------------------|--------|-----------------------|----------|
| All units | 40.48% | 44.16% | 1.48% | 4.43% | 1.79% | 5.70% |
| Rent Increase | 78.42% | 75.07% | 78.38% | 75.68% | 73.33% | 81.82% |
| Rent Increase > \$50 | 71.23% | 64.50% | 72.97% | 72.97% | 60.00% | 74.13% |
| Rent decrease | 21.48% | 24.84% | 21.62% | 24.32% | 26.67% | 18.18% |
| Shelter burden (current) | 27.80% | 27.51% | 28.43% | 27.19% | 28.21% | 28.57% |
| Shelter burden (expected) | 37.61% | 35.68% | 38.95% | 35.48% | 35.69% | 41.21% |
| Shelter burden change | 9.82% | 8.17% | 10.52% | 8.25% | 7.48% | 12.64% |
| Number of Units | 1016 | 1107 | 37 | 111 | 46 | 143 |

Breakdown by # Members

| | 1 | 2 | 3 | 4 | 5 | 6 | 7+ |
|---------------------------|--------|--------|--------|--------|--------|--------|--------|
| All units | 38.81% | 20.10% | 17.31% | 8.62% | 8.96% | 3.71% | 2.99% |
| Rent Increase | 78.99% | 69.84% | 79.49% | 78.24% | 77.48% | 80.65% | 72.31% |
| Rent Increase > \$50 | 69.98% | 60.32% | 69.82% | 67.13% | 75.23% | 75.27% | 70.77% |
| Rent decrease | 20.97% | 30.16% | 20.51% | 21.80% | 22.52% | 19.35% | 27.69% |
| Shelter burden (current) | 27.27% | 27.35% | 28.07% | 28.36% | 27.89% | 28.61% | 27.92% |
| Shelter burden (expected) | 38.11% | 33.95% | 37.10% | 34.67% | 38.44% | 41.96% | 36.42% |
| Shelter burden change | 10.84% | 6.60% | 9.03% | 6.31% | 10.55% | 13.34% | 8.90% |
| Number of units | 979 | 904 | 434 | 216 | 222 | 93 | 65 |

SECTION IV – APPROVED MTW ACTIVITIES

A. Implemented Activities:

1. Extend allowable tenant absences from unit for active duty soldiers: THA proposed and implemented this activity in 2011. THA modified its policy for terminating households who were absent from their unit for more than 180 days. Modifying the policy was necessary to account for households with adults called to active duty from retirement, from the reserves, or national guards. THA’s programs have a number of reserve or guard military families because of close proximity to Fort Lewis, one of the nation’s largest military bases. Due to the war, more of these reserve or guard members have been called to active duty. Active duty may force a household to be absent from their assisted unit for more than 180 days, leaving them without housing assistance when the service member returns home. This activity allowed THA to make the following policy revisions:

- Allow a previously assisted households returning from deployment to request reinstatement within 90 days from the date they return from deployment.

HUD Standard Metrics:

| 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. | Households losing assistance/moving prior to implementation of activity (number). | Expected households losing assistance/moving after implementation of activity (number). | Actual households losing assistance/moving after implementation of activity (number). | Whether the outcome meets or exceeds the benchmark. |

Status Update: THA does not anticipate any significant changes in the upcoming plan year. THA has worked with HUD on identifying the correct standard metrics.

Modifications to the activity during the plan year: THA does not anticipate any changes to this activity during the Plan year.

Additional Authorizations: THA does not anticipate additional authorizations for this activity during the Plan year.

2. – Tacoma Public Schools Special Housing Program (formerly McCarver Elementary Project): This activity was proposed and implemented in the 2011 MTW Plan. THA used the flexibility

provided under Moving to Work status to pilot an innovative rental assistance program in partnership with Tacoma Public Schools. The rental assistance program is designed to assist families at McCarver Elementary School and to help the school transform. Among its many challenges, McCarver has a very high student turnover rate. For the 2007-08 school year, the school's student population had a turnover rate of 121%; the previous year the turnover rate was 170%. Part of this results from the very high percentage of students below poverty level in the school (96%), and the attendant housing insecurity. McCarver has more homeless students than any other elementary schools in Tacoma.

THA used its MTW authority to provide rental assistance for eligible students and their families at McCarver for the duration of their enrollment at the school. THA began by serving 50 families with a plan to access the results on stability and educational outcomes. THA believes that increased housing stability will show in better school performance.

THA has integrated two key components as a part of McCarver Elementary School initiative: (1) condition rental assistance on the parents' commitment to their children's education and their cooperation with the school. THA has provided support through community partners to help parents do this; (2) THA has also asked the School District to complement our investment of housing dollars into McCarver School with its own reciprocal investment of resources and reform to make McCarver as excellent as leading edge school practices can make it.

Throughout their participation in the project, a family's compliance with program requirements are monitored by a case worker assigned to them. If a family has difficulty meeting the requirements, the case worker provides additional support. Should the family be determined to be unable or unwilling to comply with the requirements, their participation will be ended and the voucher will be granted to another qualifying family. Should a family drop out of the program for any reason, their voucher will be granted to another qualifying family. THA is partnering with a third party to conduct a study each year on this program.

Each family begins the program with a \$25 minimum rent. The rent increases by 20% each year until the family pays 100% of their rent in year 6. All families must have students at McCarver Elementary school to be admitted to the program.

HUD Standard Metrics:

| CE # 4: Increase in Resources Leveraged | | | | |
|---|---|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Amount of funds leveraged in dollars (increased). | Amount leveraged prior to implementation of the activity (in dollars). This number may be zero. | Expected amount leveraged after implementation of the activity (in dollars). | Actual amount leveraged after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |

| 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 income of households affected by this policy prior to implementation of the activity (in dollars). | Expected average earned income of households affected by this policy after to implementation (in dollars). | Actual average earned income of households affected by this policy after to implementation (in dollars). | Whether the outcome meets or exceeds the benchmark. |

| SS #2: Increase in Household Savings | | | | |
|---|---|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Average amount of savings/escrow of households affected by this policy in dollars (increase). | Average amount of savings/escrow of households affected by this policy (in dollars). This number may be zero. | Expected average amount of savings/escrow of households affected by this policy after implementation of the activity (in dollars). | Actual average amount of savings/escrow of households affected by this policy after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |

| SS #3: increase in Positive Outcomes in Employment Status | | | | |
|---|---|---|---|---|
| Report the Baseline, Benchmark and outcome data for each type of employment status for those head(s) of households affected by the self-sufficiency activity. | | | | |
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Report the following information separately for each category: 1) Employed full-time 2) Employed part-time 3) Enrolled in an Educational Program 4) Enrolled in job training program 5) Unemployed 6) Other | Head(s) of households in <<category name>> prior to implementation of the activity (number). This number may be zero. | Expected head(s) of household in <<category name>> after implementation of the activity (number). | Actual head(s) of household in <<category name>> after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |
| | Percentage of total work-able households in <<category name>> prior to implementation | Expected percentage of total work-able households in <<category name>> after | Actual percentage of total work-able households in <<category name>> after | Whether the outcome meets or exceeds the benchmark. |

| | | | | |
|--|---|---|---|--|
| | of activity (percent). This number may be zero. | implementation of the activity (percent). | implementation of the activity (percent). | |
|--|---|---|---|--|

| SS #4: Households Removed from Temporary Assistance for Needy Families (TANF) | | | | |
|---|---|---|---|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Number of households receiving TANF assistance (decrease). | Households receiving TANF prior to implementation of the activity (number). | Expected number of households receiving TANF after implementation of the activity (number). | Actual number of households receiving TANF after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |

| 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). | Households receiving self-sufficiency services prior to implementation of the activity (number). | Expected number of households receiving self-sufficiency services after implementation of the activity (number). | Actual number of households receiving self-sufficiency services after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |

| 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). | Average subsidy per household affected by this policy prior to implementation of the activity (in dollars). | Expected average subsidy per household affected by this policy after implementation of the activity (in dollars). | Actual average subsidy per household affected by this policy after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |

| SS #7: Increase in Agency Rental Revenue | | | | |
|---|--|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| PHA rental revenue in dollars (increase). | PHA rental revenue prior to implementation of the activity (in dollars). | Expected PHA rental revenue after implementation of the activity (in dollars). | Actual PHA rental revenue after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |

| SS #8: Households Transitioned to Self Sufficiency | | | | |
|--|---|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Number of households transitioned to self-sufficiency (increase). The PHA may create one or more definitions for “self-sufficiency” to use for this metric. Each time the PHA uses this metric, the “Outcome” number should be provided in Section (II) Operating Information in the space provided. | Households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) prior to implementation of the activity (number). This number may be zero. | Expected households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number). | Actual households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |

| HC #5: Increase in Resident Mobility | | | | |
|--|---|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Number of household able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase). | Households able to move to a better unit and/or neighborhood prior to implementation of the activity (number). This number may be zero. | Expected households able to move to a better unit and/or neighborhood after implementation of the activity (number). | Actual households able to move to a better unit and/or neighborhood after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |

Status Update: The McCarver Special Housing Program, a five year program to support formerly homeless families with children at McCarver Elementary School, has now completed its third year. The goal of this program is to revitalize McCarver Elementary and the surrounding neighborhood through increased stability and support for the most challenged families in the McCarver attendance area. After three school years there are 41 families with 72 children in the program. Two full-time caseworkers have provided support to parents through referrals to community partners in education, employment, health, and by working with public agencies. The caseworkers use these resources in combination with direct support to assist parents in creating a stable and self-sufficient family. Our community partners have also provided extended learning opportunities for the children, including a spring break camp and a five week summer school. We have seen a steady increase in parent employment and earned income. Many of the parents have completed GEDs, job training, and other educational programs. Two families became self-sufficient and voluntarily exited the program. In the first year of the program, the children made substantially higher gains in reading than comparison groups made, and they made significant improvements in attendance and discipline. In the second year, the children maintained their reading performance and attendance and discipline continued to be good. The student mobility rate at McCarver has declined from 107% at the outset of the program to 75% last year.

Modifications to the activity during the plan year: THA is currently discussing the potential expansion of this activity with Tacoma Public School District (TPS). After thorough review of the program, THA and TPS may decide the extent to which this program may be expanded. THA plans to provide an additional update to this potential modification in the 2014 Report.

Additional Authorizations: THA does not anticipate additional authorizations for this activity during the Plan year.

3. Local Project Based Voucher Program: THA proposed this activity in 2011. Parts of the program were implemented in 2011, and the rest will be implemented in 2015. This program introduces several changes to the way the project based voucher program is operated. They are as follows:

- THA removed the cap on project based vouchers for its own developments. That will allow THA to finance more developments in the future.
- THA waived the mobility option that allows PBV tenants to automatically receive a tenant-based voucher after one year of occupancy.
- THA established a reasonable competitive process and contract terms, including the length of the contract, for project-basing HCV assistance at units owned by for-profit or non-profit entities. Units must meet existing HQS or any standard developed by THA and approved by HUD pursuant to the requirements of this Restated Agreement.
- THA began conducting Housing Quality Standards (HQS) inspections on units it owns or has interest in.

The changes have allowed THA to streamline many parts of the project based program that were inefficient or unfair to those on the waitlist.

HUD Standard Metrics:

| CE # 1: Agency Cost Savings | | | | |
|---|--|---|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Total cost of task in dollars (decrease). | Cost of task prior to implementation of the activity (in dollars). | Expected cost of task after the implementation of the activity. | Actual cost of task after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |

| CE # 2: Staff Time Savings | | | | |
|--|--|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Total time to complete the task in staff hours (decrease). | Total amount of staff time dedicated to the task prior to implementation of the activity (in hours). | Expected amount of total staff time dedicated to the task after implementation of the activity (in hours). | Actual amount of total staff time dedicated to the task after implementation of the activity (in hours). | Whether the outcome meets or exceeds the benchmark. |

| CE # 3: Decrease in Error Rate of task Execution | | | | |
|---|--|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Average error rate in completing a task as a percentage (decrease). | Average error rate of task prior to implementation of activity (percentage). | Expected average error rate of task after implementation of the activity (percentage). | Actual average error rate of task after implementation of the activity (percentage). | Whether the outcome meets or exceeds the benchmark. |

| 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 | Households losing assistance/moving prior to implementation of activity (number). | Expected households losing assistance/moving after implementation of activity (number). | Actual households losing assistance/moving after implementation of activity (number). | Whether the outcome meets or exceeds the benchmark. |

| | | | | |
|-----------|--|--|--|--|
| this box. | | | | |
|-----------|--|--|--|--|

Status Update: THA project based units in 2013 using the new method for the first time. THA is inspecting its own PBV units and removed the exit voucher option in 2011.

Modifications to the activity during the plan year: THA does not anticipate any changes to this activity during the Plan year.

Additional Authorizations: THA does not anticipate additional authorizations for this activity during the Plan year.

4. Allow transfers between public housing and voucher waitlists: This activity was proposed and implemented in 2011. THA created transfers to make it easier for families to move to a unit that better meets their needs. The policy combines the public housing transfer list and the list of HCV movers who are having difficulties finding a unit that meets their needs on the private rental market. Households on the public housing transfer list can be issued a voucher if there are no units that meet their needs. Voucher holders may be transferred into a public housing unit if they cannot find a unit on the market that meets their needs.

HUD Standard Metrics:

| HC #5: Increase in Resident Mobility | | | | |
|--|---|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Number of household able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase). | Households able to move to a better unit and/or neighborhood prior to implementation of the activity (number). This number may be zero. | Expected households able to move to a better unit and/or neighborhood after implementation of the activity (number). | Actual households able to move to a better unit and/or neighborhood after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |

Status Update: The activity has made it easier for reasonable accommodation clients to find units that meet their needs. THA is continuing to look into ways to help clients on our transfer list find units that better meet their needs.

Modifications to the activity during the plan year: THA does not anticipate any changes to this activity during the Plan year.

Additional Authorizations: THA does not anticipate additional authorizations for this activity during the Plan year.

5. Local Policies for Fixed Income Households: This activity was proposed and implemented in 2012. THA used local policies to implement rent reform for fixed income households in 2012. This plan applies to households in which all adult members are either elderly or disabled and at least 90% of total household income comes from a fixed source such as social security, SSI, or pension. These households are subject to the following rent policy:

- Complete recertification reviews once every 3 years instead of every year (biennial recertifications) with no “off-year” COLA-related rent adjustments unless interim is triggered
- Eliminate elderly/disabled deduction;
- Eliminate dependent deduction;
- Eliminate medical deductions below \$2500 and implement bands
- Implement 28.5% TTP to help offset the elimination in the elderly/disabled deduction and simplification of medical expense allowances.
- Implement a tiered rent model based on adjusted income bands.
- Implement local verification policies as outlined in Activity 7.
- Implement minimum rent of \$25 (and therefore eliminate utility allowance reimbursements)

The above rent policy allows THA to streamline the process of rent calculations and annual reviews.

HUD Standard Metrics:

| CE # 1: Agency Cost Savings | | | | |
|---|--|---|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Total cost of task in dollars (decrease). | Cost of task prior to implementation of the activity (in dollars). | Expected cost of task after the implementation of the activity. | Actual cost of task after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |

| CE # 2: Staff Time Savings | | | | |
|--|--|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Total time to complete the task in staff hours (decrease). | Total amount of staff time dedicated to the task prior to implementation of the activity (in hours). | Expected amount of total staff time dedicated to the task after implementation of the activity (in hours). | Actual amount of total staff time dedicated to the task after implementation of the activity (in hours). | Whether the outcome meets or exceeds the benchmark. |

| CE # 5: Increase in Agency Rental Revenue | | | | |
|---|--|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Rental revenue in dollars (increase). | Rental revenue prior to implementation of the activity (in dollars). | Expected rental revenue after implementation of the activity (in dollars). | Actual rental revenue after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |

Status Update: The activity has allowed THA to save staff time because the reviews per year have been cut by over 50% for the activity population. THA is doing triennial reviews for this population. THA is not running off year reviews. THA has made changes to forms and documents in order to administer the rent reform program successfully. Each time a HUD form was altered, all OMB numbers were removed and the form became a THA document. THA will use a local form for the HUD Supplement to Application for Federally Assisted Housing. THA has also extended its local release replacing the HUD form 9986 to 48 months. THA will also begin using tax credit forms in lieu of HUD forms when there is duplication.

Modifications to the activity during the plan year: THA does not anticipate any changes to this activity during the Plan year.

Additional Authorizations: THA does not anticipate additional authorizations for this activity during the Plan year.

6. Local Policies for Work-Able Households. This activity was proposed and implemented in 2012. Local policies for work-able households are very similar to the fixed income activity with minor differences. THA used this activity to implement rent reform for work-able households. Under this plan work-able households are subject to the following rent policy:

- Complete recertification reviews once every 2 years instead of every year (biennial recertifications) with no “off-year” COLA-related rent adjustments unless interim is triggered
- Eliminate dependent deduction
- Eliminate medical deductions below \$2500 and implement bands
- Implement 28.5% TTP to help offset the dependent deduction
- Implement a tiered rent model based on adjusted income bands.
- Implement local verification policies as outlined in Activity 7.
- Implement minimum rent of \$75 (and therefore eliminate utility allowance reimbursements)

This above rent policy allows THA to streamline the process of rent calculations and annual reviews.

HUD Standard Metrics:

| CE # 1: Agency Cost Savings | | | | |
|---|--|---|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Total cost of task in dollars (decrease). | Cost of task prior to implementation of the activity (in dollars). | Expected cost of task after the implementation of the activity. | Actual cost of task after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |

| CE # 2: Staff Time Savings | | | | |
|--|--|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Total time to complete the task in staff hours (decrease). | Total amount of staff time dedicated to the task prior to implementation of the activity (in hours). | Expected amount of total staff time dedicated to the task after implementation of the activity (in hours). | Actual amount of total staff time dedicated to the task after implementation of the activity (in hours). | Whether the outcome meets or exceeds the benchmark. |

| CE # 5: Increase in Agency Rental Revenue | | | | |
|---|--|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Rental revenue in dollars (increase). | Rental revenue prior to implementation of the activity (in dollars). | Expected rental revenue after implementation of the activity (in dollars). | Actual rental revenue after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |

| 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 income of households affected by this policy prior to implementation of the activity (in dollars). | Expected average earned income of households affected by this policy after to implementation (in dollars). | Actual average earned income of households affected by this policy after to implementation (in dollars). | Whether the outcome meets or exceeds the benchmark. |

| SS #3: increase in Positive Outcomes in Employment Status | | | | |
|---|---|--|--|---|
| Report the Baseline, Benchmark and outcome data for each type of employment status for those head(s) of households affected by the self-sufficiency activity. | | | | |
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Report the following information separately for each category: 1) Employed full-time 2) Employed part-time 3) Enrolled in an Educational Program 4) Enrolled in job training program 5) Unemployed 6) Other | Head(s) of households in <<category name>> prior to implementation of the activity (number). This number may be zero. | Expected head(s) of household in <<category name>> after implementation of the activity (number). | Actual head(s) of household in <<category name>> after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |
| | Percentage of total work-able households in <<category name>> prior to implementation of activity (percent). This number may be zero. | Expected percentage of total work-able households in <<category name>> after implementation of the activity (percent). | Actual percentage of total work-able households in <<category name>> after implementation of the activity (percent). | Whether the outcome meets or exceeds the benchmark. |

| SS #4: Households Removed from Temporary Assistance for Needy Families (TANF) | | | | |
|---|---|---|---|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Number of households receiving TANF assistance (decrease). | Households receiving TANF prior to implementation of the activity (number). | Expected number of households receiving TANF after implementation of the activity (number). | Actual number of households receiving TANF after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |

| SS #8: Households Transitioned to Self Sufficiency | | | | |
|--|---|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Number of households transitioned to self-sufficiency (increase). The PHA may create one or more definitions for “self-sufficiency” to use for this metric. Each time the PHA uses this metric, the “Outcome” number should be provided in Section (II) Operating Information in the space provided. | Households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) prior to implementation of the activity (number). This number may be zero. | Expected households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number). | Actual households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |

Status Update: The activity has allowed THA to save staff time because the reviews per year have been cut by over 50% for the activity population. THA is doing biennial reviews for this population. THA is not running off year reviews. THA has made changes to forms and documents in order to administer the rent reform program successfully. Each time a HUD form was altered, all OMB numbers were removed and the form became a THA document. THA will use a local form for the HUD Supplement to Application for Federally Assisted Housing THA has extended its local release replacing the HUD form 9986 to 48 months. THA has increased the time THA will also begin using tax credit forms in lieu of HUD forms when there is duplication.

Modifications to the activity during the plan year: THA does not anticipate any changes to this activity during the Plan year.

Additional Authorizations: THA does not anticipate additional authorizations for this activity during the Plan year.

7. Local Income and Asset Verification Policy: THA proposed and implemented this activity in 2011. THA implemented the following policies:

- Allow tenants to self-certify assets valued at less than \$25,000.
- Disregard income from assets valued at less than \$25,000.
- Eliminate earned income disallowance (EID).
- Exclude resident stipends up to \$500
- Accept hand-carried third party verifications and increase number of days verifications are valid up to 180 days.

- Extend the authorization of the HUD 9886 form
- Accepted hand carried verifications

These changes allowed THA to further streamline inefficient processes and save both staff time while reducing the burden on clients to provide information that made little difference in rent calculation.

HUD Standard Metrics:

| CE # 1: Agency Cost Savings | | | | |
|---|--|---|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Total cost of task in dollars (decrease). | Cost of task prior to implementation of the activity (in dollars). | Expected cost of task after the implementation of the activity. | Actual cost of task after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |

| CE # 2: Staff Time Savings | | | | |
|--|--|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Total time to complete the task in staff hours (decrease). | Total amount of staff time dedicated to the task prior to implementation of the activity (in hours). | Expected amount of total staff time dedicated to the task after implementation of the activity (in hours). | Actual amount of total staff time dedicated to the task after implementation of the activity (in hours). | Whether the outcome meets or exceeds the benchmark. |

| CE # 3: Decrease in Error Rate of task Execution | | | | |
|---|--|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Average error rate in completing a task as a percentage (decrease). | Average error rate of task prior to implementation of activity (percentage). | Expected average error rate of task after implementation of the activity (percentage). | Actual average error rate of task after implementation of the activity (percentage). | Whether the outcome meets or exceeds the benchmark. |

Status Update: The activity has been successful. THA will give a full report on metrics in the 2014 MTW report.

Modifications to the activity during the plan year: THA does not anticipate any changes to this activity during the Plan year.

Additional Authorizations: THA does not anticipate additional authorizations for this activity during the Plan year.

8. Local Interim Policy: THA proposed and implemented this activity in 2011 to streamline the interim review process. THA limited the number of interims a household can have over a period of time. Households also have to meet a 20% threshold before an interim will be processed.

HUD Standard Metrics:

| CE # 1: Agency Cost Savings | | | | |
|---|--|---|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Total cost of task in dollars (decrease). | Cost of task prior to implementation of the activity (in dollars). | Expected cost of task after the implementation of the activity. | Actual cost of task after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |

| CE # 2: Staff Time Savings | | | | |
|--|--|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Total time to complete the task in staff hours (decrease). | Total amount of staff time dedicated to the task prior to implementation of the activity (in hours). | Expected amount of total staff time dedicated to the task after implementation of the activity (in hours). | Actual amount of total staff time dedicated to the task after implementation of the activity (in hours). | Whether the outcome meets or exceeds the benchmark. |

Status Update: THA has found some of the rules of the program are hurting efficiency and are burdensome on residents. Since 2013, THA has not required an interim increase if a household has had an interim decrease in between recertifications. THA will keep the 20% rule because it has been the major factor in the reduction of interims processed. THA will no longer require the residents to prove that a job loss will last longer than 90 days before processing a qualifying interim. This requirement has been both an administrative burden and a burden on clients trying to process an interim decrease.

Modifications to the activity during the plan year: THA does not anticipate any changes to this activity during the Plan year.

Additional Authorizations: THA does not anticipate additional authorizations for this activity during the Plan year.

11. Local Utility Allowance Schedule: THA proposed and implemented this activity in 2011. This activity streamlined the utility allowance credit given to housing choice voucher and public

housing clients. Utility allowances varied by building type, bedroom size, and type of fuel/energy used. These variables resulted in numerous possible utility allowance combinations that are difficult to explain to property owners and clients, and often result in methodological misunderstandings. In addition, HUD determined that incorrectly calculated utility allowances are one of the most common rent calculation errors in the country.

The Housing Authority has calculated the average utility allowance currently provided to housing choice voucher and public housing program participants, and revised allowances. The revision provides each household responsible for tenant supplied utilities with the average allowance based upon unit bedroom size. Households have a more simplified explanation of utility allowance benefits and the Housing Authority staff now selects an allowance based only on unit size instead of determining individual allowances for every unit leased.

HUD Standard Metrics:

| CE # 1: Agency Cost Savings | | | | |
|---|--|---|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Total cost of task in dollars (decrease). | Cost of task prior to implementation of the activity (in dollars). | Expected cost of task after the implementation of the activity. | Actual cost of task after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |

| CE # 2: Staff Time Savings | | | | |
|--|--|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Total time to complete the task in staff hours (decrease). | Total amount of staff time dedicated to the task prior to implementation of the activity (in hours). | Expected amount of total staff time dedicated to the task after implementation of the activity (in hours). | Actual amount of total staff time dedicated to the task after implementation of the activity (in hours). | Whether the outcome meets or exceeds the benchmark. |

| CE # 3: Decrease in Error Rate of task Execution | | | | |
|---|--|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Average error rate in completing a task as a percentage (decrease). | Average error rate of task prior to implementation of activity (percentage). | Expected average error rate of task after implementation of the activity (percentage). | Actual average error rate of task after implementation of the activity (percentage). | Whether the outcome meets or exceeds the benchmark. |

| CE # 5: Increase in Agency Rental Revenue | | | | |
|---|--|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Rental revenue in dollars (increase). | Rental revenue prior to implementation of the activity (in dollars). | Expected rental revenue after implementation of the activity (in dollars). | Actual rental revenue after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |

Status Update: THA updated the local utility allowance schedule in 2014 based on changes in local utility rates. THA continues to see staff time saved each year because of this activity.

Modifications to the activity during the plan year: THA does not anticipate any changes to this activity during the Plan year.

Additional Authorizations: THA does not anticipate additional authorizations for this activity during the Plan year.

12. Local Policy on Port Outs: THA proposed and implemented this activity in 2012. THA put limits on outgoing portability except for households that need to move out of the jurisdiction due to reasonable accommodation, employment, situations covered underneath the Violence Against Women Act (VAWA), and education. THA also allows a family to port-out if the receiving housing authority absorbs the voucher. The policy intends to cut back on the number of housing dollars leaving Tacoma and to cut back on the burden of administrating port outs.

HUD Standard Metrics:

| CE # 1: Agency Cost Savings | | | | |
|---|--|---|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Total cost of task in dollars (decrease). | Cost of task prior to implementation of the activity (in dollars). | Expected cost of task after the implementation of the activity. | Actual cost of task after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |

| CE # 2: Staff Time Savings | | | | |
|--|---|---|---|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Total time to complete the task in staff hours (decrease). | Total amount of staff time dedicated to the task prior to implementation of | Expected amount of total staff time dedicated to the task after implementation of | Actual amount of total staff time dedicated to the task after implementation of | Whether the outcome meets or exceeds the benchmark. |

| | | | | |
|--|--------------------------|--------------------------|--------------------------|--|
| | the activity (in hours). | the activity (in hours). | the activity (in hours). | |
|--|--------------------------|--------------------------|--------------------------|--|

Status Update: THA has no changes to the activity. The activity has been successful in reducing the total number of port outs each year.

Modifications to the activity during the plan year: THA does not anticipate any changes to this activity during the Plan year.

Additional Authorizations: THA does not anticipate additional authorizations for this activity during the Plan year.

15. Regional Approach for Special Purpose Housing: THA proposed this activity in 2012 and implemented it in 2013. Under this activity THA has used the competitive funding process established by the local government jurisdiction (Pierce County Consortium) to award THA funds/resources for sponsor based housing. THA has committed MTW dollars to be awarded through the locally established funding cycle. This allows THA to “pool” resources with the local jurisdiction to meet the local needs as prioritized through city and or county planning process. The pooling of resources has allowed THA to serve homeless and “at risk” of being homeless adults, unaccompanied youth, and families in the Tacoma/Pierce County area. Without the ability to operate these Local Non-Traditional programs, THA would not be able to serve these households when they need housing assistance the most. THA is using this activity to fund an unaccompanied youth housing program and add funds to the rapid rehousing program for the area.

HUD Standard Metrics:

| CE # 4: Increase in Resources Leveraged | | | | |
|---|---|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Amount of funds leveraged in dollars (increased). | Amount leveraged prior to implementation of the activity (in dollars). This number may be zero. | Expected amount leveraged after implementation of the activity (in dollars). | Actual amount leveraged after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |

| 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). | Households receiving self-sufficiency services prior to implementation of the activity (number). | Expected number of households receiving self-sufficiency services after implementation of the activity (number). | Actual number of households receiving self-sufficiency services after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |

| SS #8: Households Transitioned to Self Sufficiency | | | | |
|--|---|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Number of households transitioned to self-sufficiency (increase). The PHA may create one or more definitions for “self-sufficiency” to use for this metric. Each time the PHA uses this metric, the “Outcome” number should be provided in Section (II) Operating Information in the space provided. | Households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) prior to implementation of the activity (number). This number may be zero. | Expected households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number). | Actual households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |

| 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 | Housing units of this type prior to implementation of the activity (number). This number may be zero. | Expected housing units of this type after implementation of the activity (number). | Actual housing units of this type after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |

| | | | | |
|---|--|--|--|--|
| specific type of household, give that type in this box. | | | | |
|---|--|--|--|--|

| HC #5: Increase in Resident Mobility | | | | |
|--|---|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Number of household able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase). | Households able to move to a better unit and/or neighborhood prior to implementation of the activity (number). This number may be zero. | Expected households able to move to a better unit and/or neighborhood after implementation of the activity (number). | Actual households able to move to a better unit and/or neighborhood after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |

Status Update: THA has successfully continued serving households through this activity in 2014. 47 households were served in plan year 2013. THA has been working with partnering agencies to increase that number in 2014 and will continue to do so in 2015. THA will increase the amount of dollars from \$150,000 in 2013 to \$650,000 in plan year 2015.

Modifications to the activity during the plan year: THA does not anticipate any changes to this activity during the Plan year.

Additional Authorizations: THA does not anticipate additional authorizations for this activity during the Plan year.

16. Creation and Preservation of Affordable Housing: This activity was proposed in 2012 and implemented in 2012. This initiative allows THA to use its MTW funds to provide low-income families the opportunity to reside in safe, decent, and sanitary housing while paying affordable rents. The affordable housing units may be any bedroom size and will be located within the City of Tacoma. They may be acquired or created by THA to be rented to families at or below 80% AMI. THA intends to allow eligible low-income families to reside in the units, including those that may be receiving Section 8 rental assistance. This activity falls under PIH Notice 2011-45. The broader uses of funds authority under MTW makes this initiative possible as HCV funds can be used to serve a greater number of families residing within the City of Tacoma. These units may house both families who are MTW Housing Choice Voucher participants and families who are not currently receiving other types of rental assistance.

HUD Standard Metrics:

| 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. | Housing units of this type prior to implementation of the activity (number). This number may be zero. | Expected housing units of this type after implementation of the activity (number). | Actual housing units of this type after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |

| 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 unit reach a specific type of household, give that type in this box. | Housing units preserved prior to implementation of the activity (number). | Expected housing units preserved after implementation of the activity (number). | Actual housing units preserved after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |

| HC #5: Increase in Resident Mobility | | | | |
|--|---|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Number of household able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase). | Households able to move to a better unit and/or neighborhood prior to implementation of the activity (number). This number may be zero. | Expected households able to move to a better unit and/or neighborhood after implementation of the activity (number). | Actual households able to move to a better unit and/or neighborhood after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |

Status Update: This activity was used in 2012 to help with the development of Bay Terrace, formerly Hillside Terrace. Phase I will come online in early 2014. The units coming online under this activity will be a mix of project based units, public housing units and affordable units that do not have a subsidy attached. This MTW activity allowed THA to activate its broader uses of funds ability so the agency could spend MTW dollars on the construction of affordable housing units. THA will also use MTW dollars to fill any funding gaps in the public housing units and affordable units that will be in the project.

Modifications to the activity during the plan year: THA does not anticipate any changes to this activity during the Plan year.

Additional Authorizations: THA does not anticipate additional authorizations for this activity during the Plan year.

17. Housing Opportunity Program (HOP): THA proposed this in the 2013 MTW plan and implemented it in 2013. THA re-proposed HOP in the 2014 plan because of changes to the program that required additional authorizations. These changes included allowing for longer voucher times and flexibility in lease requirements, allowing participants to self-certify their income during the review process and allowing participants to lease up in shared housing units or to rent from relatives. Program requirements were also re-proposed in the 2014 plan. The changes included that applicants must be at or below 50% AMI to qualify, the age of elderly was defined as 57 for HOP only, and that participants will income out once they reach 80% AMI and will receive 90 days of continued assistance.

All new admissions to the tenant based voucher program receive a HOP voucher. A HOP voucher is a fixed subsidy as opposed to a subsidy based on income. That includes senior/disabled households. Work-able households have a five year time limit on their assistance. Senior/disabled households do not have a time limit. HOP households would have annual reexaminations so THA can monitor the earned income and compare it to its other programs.

There will be no interim exams allowed in this program. THA will not permit port outs for this program except for domestic violence issues covered by VAWA and Reasonable Accommodations. The goal of the program is to help our participants achieve true self sufficiency by assisting them with their housing needs for a specific term. An example of the fixed subsidy is below:

| SUBSIDY AMOUNT | | | | | |
|--|-----|-------|-------|-------|---------|
| Voucher Size | 1 | 2 | 3 | 4 | 5 |
| Proposed MTW Subsidy Amount (50% of payment standards) | 390 | \$492 | \$725 | \$871 | \$1,002 |

HUD Standard Metrics:

| 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 income of households affected by this policy prior to implementation of the activity (in dollars). | Expected average earned income of households affected by this policy after to implementation (in dollars). | Actual average earned income of households affected by this policy after to implementation (in dollars). | Whether the outcome meets or exceeds the benchmark. |

| SS #2: Increase in Household Savings | | | | |
|---|---|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Average amount of savings/escrow of households affected by this policy in dollars (increase). | Average amount of savings/escrow of households affected by this policy (in dollars). This number may be zero. | Expected average amount of savings/escrow of households affected by this policy after implementation of the activity (in dollars). | Actual average amount of savings/escrow of households affected by this policy after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |

| SS #3: increase in Positive Outcomes in Employment Status |
|---|
| Report the Baseline, Benchmark and outcome data for each type of employment status for those head(s) of households affected by the self-sufficiency activity. |

| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
|---|---|--|--|---|
| Report the following information separately for each category: 1) Employed full-time 2) Employed part-time 3) Enrolled in an Educational Program 4) Enrolled in job training program 5) Unemployed 6) Other | Head(s) of households in <<category name>> prior to implementation of the activity (number). This number may be zero. | Expected head(s) of household in <<category name>> after implementation of the activity (number). | Actual head(s) of household in <<category name>> after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |
| | Percentage of total work-able households in <<category name>> prior to implementation of activity (percent). This number may be zero. | Expected percentage of total work-able households in <<category name>> after implementation of the activity (percent). | Actual percentage of total work-able households in <<category name>> after implementation of the activity (percent). | Whether the outcome meets or exceeds the benchmark. |

| SS #4: Households Removed from Temporary Assistance for Needy Families (TANF) | | | | |
|---|---|---|---|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Number of households receiving TANF assistance (decrease). | Households receiving TANF prior to implementation of the activity (number). | Expected number of households receiving TANF after implementation of the activity (number). | Actual number of households receiving TANF after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |

| 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). | Households receiving self-sufficiency services prior to implementation of the activity (number). | Expected number of households receiving self-sufficiency services after implementation of the activity (number). | Actual number of households receiving self-sufficiency services after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |

| 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). | Average subsidy per household affected by this policy prior to implementation of the activity (in dollars). | Expected average subsidy per household affected by this policy after implementation of the activity (in dollars). | Actual average subsidy per household affected by this policy after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |

| SS #7: Increase in Agency Rental Revenue | | | | |
|---|--|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| PHA rental revenue in dollars (increase). | PHA rental revenue prior to implementation of the activity (in dollars). | Expected PHA rental revenue after implementation of the activity (in dollars). | Actual PHA rental revenue after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |

| SS #8: Households Transitioned to Self Sufficiency | | | | |
|--|---|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Number of households transitioned to self-sufficiency (increase). The PHA may create one or more definitions for “self-sufficiency” to use for this metric. Each time the PHA uses this metric, the “Outcome” number should be provided in Section (II) Operating Information in the space provided. | Households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) prior to implementation of the activity (number). This number may be zero. | Expected households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number). | Actual households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |

| HC #3: Decrease in Wait List Time | | | | |
|---|--|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Average applicant time on wait list in months (decrease). | Average applicant time on wait list prior to implementation of activity (in months). | Expected average applicant time on wait list after implementation of activity (in months). | Actual average applicant time on wait list after implementation of activity (in months). | Whether the outcome meets or exceeds the benchmark. |

| CE # 1: Agency Cost Savings | | | | |
|---|--|---|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Total cost of task in dollars (decrease). | Cost of task prior to implementation of the activity (in dollars). | Expected cost of task after the implementation of the activity. | Actual cost of task after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |

| CE # 2: Staff Time Savings | | | | |
|--|--|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Total time to complete the task in staff hours (decrease). | Total amount of staff time dedicated to the task prior to implementation of the activity (in hours). | Expected amount of total staff time dedicated to the task after implementation of the activity (in hours). | Actual amount of total staff time dedicated to the task after implementation of the activity (in hours). | Whether the outcome meets or exceeds the benchmark. |

| CE # 3: Decrease in Error Rate of task Execution | | | | |
|---|--|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Average error rate in completing a task as a percentage (decrease). | Average error rate of task prior to implementation of activity (percentage). | Expected average error rate of task after implementation of the activity (percentage). | Actual average error rate of task after implementation of the activity (percentage). | Whether the outcome meets or exceeds the benchmark. |

Status Update: THA implemented the activity in 2013 and the results of the program have been positive. THA will pull 150 households from the waitlist in plan year 2015. Households are

leasing up at high rates (over 80%), average incomes are up compared to the traditional program, and households are leasing up in higher opportunity areas compared to the regular program. In 2014, THA revised its payment standards. The revisions are reflected in the table of HOP subsidy amount above.

Modifications to the activity during the plan year: THA does not anticipate any changes to this activity during the Plan year.

Additional Authorizations: THA does not anticipate additional authorizations for this activity during the Plan year.

18. Elimination of the 40% Rule: This activity was proposed in the 2013 MTW Plan and implemented in 2013. THA used this activity to waive the 40% cap on the percentage of income spent on rent. Our goal is to allow for maximum resident choice in the voucher program and to substantially increase the participant’s ability to understand the program and lease up more quickly. THA has observed that the voucher program has been extremely confusing for participants. Despite using multiple tools to simplify the process, many participants leave the voucher briefing unsure about how to apply the information as they begin their search. As a result, the number of calls THA fields during the lease up process is high. THA wants participants to be confident about their choices in the housing market.

HUD Standard Metrics:

| HC #5: Increase in Resident Mobility | | | | |
|--|---|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Number of household able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase). | Households able to move to a better unit and/or neighborhood prior to implementation of the activity (number). This number may be zero. | Expected households able to move to a better unit and/or neighborhood after implementation of the activity (number). | Actual households able to move to a better unit and/or neighborhood after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |

Status Update: THA implemented this activity in 2013. The change has led to staff time savings and has made it easier for clients to understand the leasing program. Full detail will be given in the 2014 MTW Report.

Modifications to the activity during the plan year: THA does not anticipate any changes to this activity during the Plan year.

Additional Authorizations: THA does not anticipate additional authorizations for this activity during the Plan year. **19. Modification of the Family Self Sufficiency Program:** This activity was proposed in the 2013 Plan and implemented in 2013. THA modified the way the FSS program handles the escrow payments. THA changed the escrow calculations to simplify the process and to provide clearer motivation and guidelines for participating families.

THA has designed a savings calculation method under which families may qualify for one or more pay points. Pay points will be calculated and credited at the end of the FSS contract term and only if the family provides credible and verifiable documentation that show they qualify for each of the pay point credit types. Below is an example a number of pay points:

- \$2,000 Maintain 32 hours/week employment for a minimum of 6 consecutive months
- \$1,000 Complete ESL classes; Levels 1-5, \$200 per level
- \$100 Receive certificate of successful completion of financial literacy
- \$3,000 Complete educational goal such as a GED, degree from an accredited school/college, vocational certificate, etc. Maximum escrow credit for achieving educational goals is \$3000 per family.
- \$500: 0-6 months vocational training certificate
- \$750: 7-12 months vocational training certificate
- \$1,000: 13-24 months vocational training certificate
- \$1,500-Associate degree
- \$2,000-Bachelor's degree

HUD Standard Metrics:

| CE # 1: Agency Cost Savings | | | | |
|---|--|---|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Total cost of task in dollars (decrease). | Cost of task prior to implementation of the activity (in dollars). | Expected cost of task after the implementation of the activity. | Actual cost of task after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |

| CE # 2: Staff Time Savings | | | | |
|--|--|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Total time to complete the task in staff hours (decrease). | Total amount of staff time dedicated to the task prior to implementation of the activity (in hours). | Expected amount of total staff time dedicated to the task after implementation of the activity (in hours). | Actual amount of total staff time dedicated to the task after implementation of the activity (in hours). | Whether the outcome meets or exceeds the benchmark. |

| 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 income of households affected by this policy prior to implementation of the activity (in dollars). | Expected average earned income of households affected by this policy after to implementation (in dollars). | Actual average earned income of households affected by this policy after to implementation (in dollars). | Whether the outcome meets or exceeds the benchmark. |

| SS #2: Increase in Household Savings | | | | |
|---|---|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Average amount of savings/escrow of households affected by this policy in dollars (increase). | Average amount of savings/escrow of households affected by this policy (in dollars). This number may be zero. | Expected average amount of savings/escrow of households affected by this policy after implementation of the activity (in dollars). | Actual average amount of savings/escrow of households affected by this policy after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |

| SS #3: increase in Positive Outcomes in Employment Status | | | | |
|--|---|---|---|---|
| Report the Baseline, Benchmark and outcome data for each type of employment status for those head(s) of households affected by the self-sufficiency activity. | | | | |
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Report the following information separately for each category: 1) Employed full-time 2) Employed part-time 3) Enrolled in an Educational Program 4) Enrolled in job training program | Head(s) of households in <<category name>> prior to implementation of the activity (number). This number may be zero. | Expected head(s) of household in <<category name>> after implementation of the activity (number). | Actual head(s) of household in <<category name>> after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |
| | Percentage of total work-able households in <<category name>> prior to | Expected percentage of total work-able households in <<category | Actual percentage of total work-able households in <<category | Whether the outcome meets or exceeds the benchmark. |

| | | | | |
|---------------------------|--|--|--|--|
| 5) Unemployed 6) Other | implementation of activity (percent). This number may be zero. | name>> after implementation of the activity (percent). | name>> after implementation of the activity (percent). | |
|---------------------------|--|--|--|--|

| SS #4: Households Removed from Temporary Assistance for Needy Families (TANF) | | | | |
|---|---|---|---|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Number of households receiving TANF assistance (decrease). | Households receiving TANF prior to implementation of the activity (number). | Expected number of households receiving TANF after implementation of the activity (number). | Actual number of households receiving TANF after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |

| 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). | Households receiving self-sufficiency services prior to implementation of the activity (number). | Expected number of households receiving self-sufficiency services after implementation of the activity (number). | Actual number of households receiving self-sufficiency services after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |

| 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). | Average subsidy per household affected by this policy prior to implementation of the activity (in dollars). | Expected average subsidy per household affected by this policy after implementation of the activity (in dollars). | Actual average subsidy per household affected by this policy after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |

| SS #7: Increase in Agency Rental Revenue | | | | |
|--|----------|-----------|---------|---------------------|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| | | | | |

| | | | | |
|---|--|--|--|---|
| PHA rental revenue in dollars (increase). | PHA rental revenue prior to implementation of the activity (in dollars). | Expected PHA rental revenue after implementation of the activity (in dollars). | Actual PHA rental revenue after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |
|---|--|--|--|---|

| SS #8: Households Transitioned to Self Sufficiency | | | | |
|--|---|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Number of households transitioned to self-sufficiency (increase). The PHA may create one or more definitions for “self-sufficiency” to use for this metric. Each time the PHA uses this metric, the “Outcome” number should be provided in Section (II) Operating Information in the space provided. | Households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) prior to implementation of the activity (number). This number may be zero. | Expected households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number). | Actual households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |

Status Update: The activity was successfully implemented in 2013. Clients have reported the escrow is motivating and easier to understand. THA has also seen staff time saved, and the time is now being spent on direct service. The 2013 MTW Report will have a full list of the applicable metrics.

Modifications to the activity during the plan year: THA does not anticipate any changes to this activity during the Plan year.

Additional Authorizations: THA does not anticipate additional authorizations for this activity during the Plan year.

20. MTW Seed Grants: This activity was proposed in 2013 and implemented in 2013. THA proposed this activity so if needed the agency could provide seed grants to partner service agencies to increase capacity to serve THA households. The grants would be specific to helping work-able households increase earned income and become self-sufficient.

HUD Standard Metrics:

| CE # 4: Increase in Resources Leveraged | | | | |
|---|---|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Amount of funds leveraged in dollars (increased). | Amount leveraged prior to implementation of the activity (in dollars). This number may be zero. | Expected amount leveraged after implementation of the activity (in dollars). | Actual amount leveraged after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |

| 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 income of households affected by this policy prior to implementation of the activity (in dollars). | Expected average earned income of households affected by this policy after to implementation (in dollars). | Actual average earned income of households affected by this policy after to implementation (in dollars). | Whether the outcome meets or exceeds the benchmark. |

| SS #3: increase in Positive Outcomes in Employment Status | | | | |
|---|---|---|---|---|
| Report the Baseline, Benchmark and outcome data for each type of employment status for those head(s) of households affected by the self-sufficiency activity. | | | | |
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Report the following information separately for each category: 1) Employed full-time 2) Employed part-time 3) Enrolled in an Educational Program 4) Enrolled in job training program 5) Unemployed 6) Other | Head(s) of households in <<category name>> prior to implementation of the activity (number). This number may be zero. | Expected head(s) of household in <<category name>> after implementation of the activity (number). | Actual head(s) of household in <<category name>> after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |
| | Percentage of total work-able households in <<category name>> prior to implementation of activity | Expected percentage of total work-able households in <<category name>> after implementation | Actual percentage of total work-able households in <<category name>> after implementation | Whether the outcome meets or exceeds the benchmark. |

| | | | | |
|--|-------------------------------------|----------------------------|----------------------------|--|
| | (percent). This number may be zero. | of the activity (percent). | of the activity (percent). | |
|--|-------------------------------------|----------------------------|----------------------------|--|

| 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). | Households receiving self-sufficiency services prior to implementation of the activity (number). | Expected number of households receiving self-sufficiency services after implementation of the activity (number). | Actual number of households receiving self-sufficiency services after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |

| SS #8: Households Transitioned to Self Sufficiency | | | | |
|--|---|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Number of households transitioned to self-sufficiency (increase). The PHA may create one or more definitions for “self-sufficiency” to use for this metric. Each time the PHA uses this metric, the “Outcome” number should be provided in Section (II) Operating Information in the space provided. | Households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) prior to implementation of the activity (number). This number may be zero. | Expected households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number). | Actual households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |

Status Update: THA used this activity to provide three (3) job skills and soft skills trainings for work-able households in 2013.

Modifications to the activity during the plan year: THA does not anticipate any changes to this activity during the Plan year.

Additional Authorizations: THA does not anticipate additional authorizations for this activity during the Plan year.

21. Local Asset Building Activity: This activity was proposed in the 2014 MTW plan and implemented in 2014. THA partnered with the Bill and Melinda Gates Foundation (BMGF) to create a program to encourage and support student success. THA used the BMGF funding to support planning and development of the Scholar Incentive Program. The incentive program is aimed at improving academic achievement, graduation rates and college preparation and enrollment. The program identifies a series of pay points for engaging in specific activities tied to academic success, or achieving specific academic outcomes. These activities and achievements help students succeed in school, graduate with a 2.0 or higher grade point average, and take necessary college preparatory coursework. In turn, these achievements help qualify students for use of Washington State’s College Bound Scholarship.

THA contributes a 1:1 cash match to pay the cash incentives to students. Multiple partners provide advising, academic support and mentoring for Scholar Incentive participants.

| INCENTIVES for Students 7th Grade. | Incentive deposited in student's saving acct | Incentive paid directly to student | TOTAL |
|--|---|---|--------------|
| Initial deposit to open savings account | \$50 | | \$50 |
| Maintain a 2.0 or better GPA (annually) | \$15 | | |
| Signing up and attending a college prep or mentoring program such as: CSF, TRiO, MIP, Brotherhood/Sisterhood and maintain a 90% or better monthly attendance | \$170 | \$15 | \$200 |
| Complete summer academic enrichment program. At least 2 weeks, 4-5 days a week, 4-6 hours a day. | \$50 | \$100 | \$150 |
| Volunteer work in community (organized activity with adult program coordinator). 30 hours/year. | \$85 | \$15 | \$100 |
| Complete Financial Literacy Class and deposit a minimum of \$5 in savings consistently for 6 months. | \$100 | | \$100 |
| | | | |
| Total annual incentive a 7th graders can earn: | \$470 | \$130 | \$600 |

HUD Standard Metrics:

| SS #2: Increase in Household Savings | | | | |
|---|---|---|---|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Average amount of savings/escrow of households affected by this | Average amount of savings/escrow of households affected by this | Expected average amount of savings/escrow of households | Actual average amount of savings/escrow of households | Whether the outcome meets or exceeds the benchmark. |

| | | | | |
|-------------------------------|---|--|--|--|
| policy in dollars (increase). | policy (in dollars). This number may be zero. | affected by this policy after implementation of the activity (in dollars). | affected by this policy after implementation of the activity (in dollars). | |
|-------------------------------|---|--|--|--|

Status Update: THA is continuing to encourage students to take advantage of this activity. THA will provide a full update in the 2014 MTW Report.

Modification to the activity during the plan year:

THA plans to expand the local asset building activity to offer individual development accounts (IDAs) for the children of New Salishan from kindergarten through high school. New Salishan is THA’s largest community. It is a HOPE VI redevelopment that created a mixed-income community of 1,350 renter and homeowner households on an award-winning design.

THA will offer two programs, both linked to schools serving Salishan. The **first** will serve Salishan children in Lister Elementary School, and two other schools nearby. This program will be called the *Salishan Elementary School Children’s Savings Account Program*. It will match family deposits in IDAs that the program will host for each enrolled child. This program will take children from kindergarten through fifth grade. The **second** program will cover children of Salishan renters who enroll at the adjacent middle school, First Creek Middle School. It is called the *Scholar’s Incentive Program*. Each middle school student and a counselor will fashion an individualized plan taking the student from 6th grade through high school graduation and enrollment in a post-secondary program. The plan will set academic milestones along the way (e.g, attendance, grade point average, taking advance classes, taking the PSAT, SAT and ACT, applying for post-secondary programs, completing the FAFSA, graduating from high school, and enrolling in a post-secondary program). As the student meets each milestone, the program will deposit money into the student’s IDA. When the student completes the journey after high school graduation, the IDA balance will be available for education or training purposes. In combination with Washington State’s College Bound Scholarship that pays for tuition, these IDA balances make college attendance affordable.

When fully in place, these two programs will serve 760 children in cohorts covering 13 grades.

Experience and research strongly suggest that even modest balances in such accounts greatly increase the prospects that a student will attend college. For this reason, THA undertakes these efforts as part of its Education Project.

THA plans this effort in collaboration with Tacoma Public Schools (TPS), Corporation for Enterprise Development (CFED), initial funding from the Bill & Melinda Gates Foundation, CFED and the Bamford Foundation, and the collaboration of banking and social service partners in Tacoma. Further funding will determine the scope and schedule for this initiative.

Additional Authorizations: THA does not anticipate additional authorizations for this activity during the Plan year.

23. College Housing Assistance Program (formerly Learn to Succeed): This activity was proposed in the 2014 MTW plan and was fully implemented in 2014. THA partnered with the Tacoma Community College (TCC) where THA provides rental assistance to homeless students at the community college. TCC provides services designed to help the families succeed so they are ready to be independent of housing subsidies after graduation. The program offers the same fixed subsidies as the HOP program and has a three (3) year limit on assistance. Graduates are considered a success and transitioned off of the program with a 30 day notice. The community college handles all eligibility but anyone on the program would have to be an active student at the community college. Students have to continue to stay in college and maintain a 2.0 grade level.

HUD Standard Metrics:

| CE # 4: Increase in Resources Leveraged | | | | |
|---|---|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Amount of funds leveraged in dollars (increased). | Amount leveraged prior to implementation of the activity (in dollars). This number may be zero. | Expected amount leveraged after implementation of the activity (in dollars). | Actual amount leveraged after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |

| SS #3: increase in Positive Outcomes in Employment Status | | | | |
|---|---|--|--|---|
| Report the Baseline, Benchmark and outcome data for each type of employment status for those head(s) of households affected by the self-sufficiency activity. | | | | |
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Report the following information separately for each category: 1) Employed full-time 2) Employed part-time 3) Enrolled in an Educational Program 4) Enrolled in job training program 5) Unemployed 6) Other | Head(s) of households in <<category name>> prior to implementation of the activity (number). This number may be zero. | Expected head(s) of household in <<category name>> after implementation of the activity (number). | Actual head(s) of household in <<category name>> after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |
| | Percentage of total work-able households in <<category name>> prior to implementation of activity (percent). This number may be | Expected percentage of total work-able households in <<category name>> after implementation of the activity (percent). | Actual percentage of total work-able households in <<category name>> after implementation of the activity (percent). | Whether the outcome meets or exceeds the benchmark. |

| | | | | |
|--|-------|--|--|--|
| | zero. | | | |
|--|-------|--|--|--|

| 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). | Households receiving self-sufficiency services prior to implementation of the activity (number). | Expected number of households receiving self-sufficiency services after implementation of the activity (number). | Actual number of households receiving self-sufficiency services after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |

| 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). | Average subsidy per household affected by this policy prior to implementation of the activity (in dollars). | Expected average subsidy per household affected by this policy after implementation of the activity (in dollars). | Actual average subsidy per household affected by this policy after implementation of the activity (in dollars). | Whether the outcome meets or exceeds the benchmark. |

| SS #8: Households Transitioned to Self Sufficiency | | | | |
|--|---|--|--|---|
| Unit of Measurement | Baseline | Benchmark | Outcome | Benchmark Achieved? |
| Number of households transitioned to self-sufficiency (increase). The PHA may create one or more definitions for “self-sufficiency” to use for this metric. Each time the PHA uses this metric, the “Outcome” number should be provided in Section (II) Operating Information in the space provided. | Households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) prior to implementation of the activity (number). This number may be zero. | Expected households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number). | Actual households transitioned to self-sufficiency (<<PHA definition of self-sufficiency>>) after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |

| 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. | Housing units of this type prior to implementation of the activity (number). This number may be zero. | Expected housing units of this type after implementation of the activity (number). | Actual housing units of this type after implementation of the activity (number). | Whether the outcome meets or exceeds the benchmark. |

Status Update: This activity will be implemented in August/September of 2014. THA provided HOP subsidy to 20 Tacoma Community College households. THA will give a full report of the activity in the 2014 report.

Modifications to the activity during the plan year: THA may consider an expanded use of this activity to provide housing to students in other local post-secondary institutions in Tacoma in 2015 and beyond. In its consideration, THA will evaluate the program through its data sharing partnership with TCC. Additionally, THA and TCC changed the name of the activity/program to the College Housing Assistance Program (CHAP) to better reflect the program goals.

Additional Authorizations: An expansion of the College Housing Assistance Program would not require any additional authorizations.

B. Not Yet Implemented:

9. Modified Housing Choice Voucher Activity: THA proposed this activity in 2011 and has yet to implement it. The activity proposed to modify the annual inspection process to allow for biennial inspections of qualifying HCV units (instead of yearly) and decoupling annual recertification and inspection dates in order to group inspections geographically. Once THA does implement this activity, the agency will inspect voucher units only once every two years if the following is true: (i) the participants resided in the same unit for a minimum of three years and (ii) they passed two consecutive annual inspections on the first visit. This would reward stable tenants with a history of taking care of their unit. THA will continue to inspect in response to complaints or other evidence of problems. THA will create a quality assurance process to randomly inspect 5-10% of these units during the “off” year.

Status Update: THA will look at implementing this activity in late 2014 or early 2015.

Modifications to the activity during the plan year: THA does not anticipate any changes to this activity during the Plan year.

Additional Authorizations: THA does not anticipate additional authorizations for this activity during the Plan year.

10. Special Program Vouchers: This activity was proposed in 2011 but not yet implemented. The initial idea was to establish a Special Program Voucher program similar to the project-based voucher program. Vouchers were to be awarded to service partners for a special purpose or a special program. The service partners would be responsible for designing the program. This includes selecting households for the program, establishing program guidelines and eligibility criteria, length of time a household would be eligible for a voucher, level of assistance provided to each household, etc. THA would then oversee the administration of these vouchers through an annual reporting and/or audit process.

Status Update: This activity was proposed before the parameters notice. THA now proposes any new activity that is not directly operated by our agency as a separate local non-traditional program activity or a rent reform activity if it is being operated within THA. No activities are being operated under this activity as of now. There is not a timeline in place to use this activity.

Modifications to the activity during the plan year: THA does not anticipate any changes to this activity during the Plan year.

Additional Authorizations: THA does not anticipate additional authorizations for this activity during the Plan year.

13. Local Blended Subsidy: THA proposed this activity in 2012 but has not implemented it as of yet. The activity was created so that THA could create a local blended subsidy (LBS) at existing and, if available, at new or rehabilitated units. The LBS program would use a blend of MTW Section 8 and public housing funds to subsidize units reserved for families earning 80 percent or below of area median income. The units may be new, rehabilitated, or existing housing. The activity is meant to increase the number of households served and to bring public housing units off of the shelf.

Status Update: Because of the complicated nature of this activity, THA has not implemented it as of yet. THA is also looking at a RAD conversion in 2014/2015 which could cause this activity to move to the closed section.

Modifications to the activity during the plan year: THA does not anticipate any changes to this activity during the Plan year.

Additional Authorizations: THA does not anticipate additional authorizations for this activity during the Plan year.

14. Special Purpose Housing: THA proposed this activity in 2012 and has not implemented it. The activity was meant to utilize public housing units to provide special purpose housing, and improve quality of services or features for targeted populations. In partnership with agencies that provide social services, THA would make affordable housing available to households that would not be admitted to traditional public housing units. With this program, THA would sign a lease Tacoma Housing Authority 2015 MTW Plan Amendment August 27, 2015

with partner agencies to use public housing units both for service-enriched transitional/short-term housing and for office space for community activities and service delivery. The ability to designate public housing units for specific purposes and populations allows units to target populations with specific service and housing needs and specific purposes, such as homeless teens and young adults.

Status Update: THA has not implemented this activity. Because of the RAD application, there is no timeline to implement this activity. If RAD is approved, THA would move this activity to the closed section.

Modifications to the activity during the plan year: THA does not anticipate any changes to this activity during the Plan year.

Additional Authorizations: THA does not anticipate additional authorizations for this activity during the Plan year.

22. Exclude Excess Income from Financial Aid for Students: This activity was proposed in the 2014 MTW plan and has not yet been implemented. The purpose of the activity is to further encourage self-sufficiency among participants and streamline administrative processes; THA will modify the administration of the full-time student deduction by excluding 100 percent of a student's financial aid.

Modifications to the activity during the plan year: THA does not anticipate any changes to this activity during the Plan year.

Additional Authorizations: THA does not anticipate additional authorizations for this activity during the Plan year.

24. Local Security and Utility Deposit Program:

Description of MTW activity: This activity was proposed in the 2014 MTW plan and has yet to implement it. The activity proposed to start a security deposit and utility deposit assistance program that would be open to all THA applicants/residents who are in need of assistance in order to move into a unit. THA realizes it is very difficult when a households name comes to the top of a waitlist and the applicant does not have the resources to pay the security deposit. This program will ensure that families in need can afford to move into the unit when their name is called and will reduce the number of unit turndowns THA receives.

Modifications to the activity during the plan year: THA does not anticipate any changes to this activity during the Plan year.

Additional Authorizations: THA does not anticipate additional authorizations for this activity during the Plan year.

Status Update: The terms of the program are under development and must be set into THA policy before implementation. This activity will be implemented in early 2015.

C. On Hold Activities:

Tacoma Housing Authority 2015 MTW Plan Amendment
August 27, 2015

N/A

D. Closed Out Activities:

N/A

SECTION V SOURCES AND USES

| Estimated Sources of MTW Funding for the Fiscal Year | | |
|---|--|-------------------------|
| PHAs shall provide the estimated sources and amounts of MTW funding by FDS line item. | | |
| Sources | | |
| FDS Line Item | FDS Line Item Name | Dollar Amount |
| 70500 (70300+70400) | Total Tenant Revenue | \$ 1,345,000.00 |
| 70600 | HUD PHA Operating Grants | \$ 39,220,000.00 |
| 70610 | Capital Grants | \$ 1,050,000.00 |
| 70700 (70710+70720+70730+70740+70750) | Total Fee Revenue | \$ 2,780,000.00 |
| 71100+72000 | Interest Income | \$ 31,000.00 |
| 71600 | Gain or Loss on Sale of Capital Assets | \$ - |
| 71200+71300+71310+71400+71500 | Other Income | \$ 150,000.00 |
| 70000 | Total Revenue | \$ 44,576,000.00 |

Estimated Uses of MTW Funding for the Fiscal Year

| PHAs shall provide the estimated uses and amounts of MTW spending by FDS line item. | | |
|---|--|-------------------------|
| Uses | | |
| FDS Line Item | FDS Line Item Name | Dollar Amount |
| 91000 (91100+91200+91400+91500+91600+91700+91800+91900) | Total Operating - Administrative | \$ 8,150,000.00 |
| 91300+91310+92000 | Management Fee Expense | \$ 2,030,000.00 |
| 91810 | Allocated Overhead | \$ - |
| 92500 (92100+92200+92300+92400) | Total Tenant Services | \$ 660,000.00 |
| 93000 (93100+93600+93200+93300+93400+93800) | Total Utilities | \$ 572,000.00 |
| 93500+93700 | Labor | \$ 866,000.00 |
| 94000 (94100+94200+94300+94500) | Total Ordinary Maintenance | \$ 645,000.00 |
| 95000 (95100+95200+95300+95500) | Total Protective Services | \$ 97,000.00 |
| 96100 (96110+96120+96130+96140) | Total insurance Premiums | \$ 176,000.00 |
| 96000 (96200+96210+96300+96400+96500+96600+96800) | Total Other General Expenses | \$ 1,131,000.00 |
| 96700 (96710+96720+96730) | Total Interest Expense and Amortization Cost | \$ 112,000.00 |
| 97100+97200 | Total Extraordinary Maintenance | \$ 285,000.00 |
| 97300+97350 | Housing Assistance Payments + HAP Portability-In | \$ 29,125,000.00 |
| 97400 | Depreciation Expense | \$ 2,350,000.00 |
| 97500+97600+97700+97800 | All Other Expenses | \$ - |
| 90000 | Total Expenses | \$ 46,199,000.00 |

Describe the Activities that Will Use Only MTW Single Fund Flexibility

THA combined its Public Housing Operating subsidies, Public Housing Capital Funds and its Section 8 Housing Choice Voucher Program assistance into a single authority-wide funding source (MTW Funds). Public Housing Capital Funds will still be subject to the obligation and expenditure deadlines and requirements provided in section 9(j) of the 1937 Act despite the fact that they are combined into a single fund.

THA uses this single funding source to fund Public Housing operations, the Public Housing Capital Fund and the Housing Choice Voucher programs in order to carry out the mission of the MTW Demonstration Program through activities that would otherwise be eligible under sections 8 and 9 of the 1937 Act. Below are listed some of the specific ways in which THA plans to exercise the Single-Fund Flexibility:

- THA is making changes to relieve the administrative burden on both the agency and the tenants by creating a more streamlined approach to both the certification process and inspections. THA intends its processes to be less intrusive on people with fixed incomes such as the elderly and disabled, and to relieve families from some of the more burdensome requirements of annual certification. The new certification cycle started in 2013..
- THA is focusing on housing, employment-related services, and other case management activities that will move families towards self-sufficiency. Its Community Services area also assists tenants that are facing challenges in successful tenancy.
- THA is going into the fourth year of its Education program. THA is providing Housing Choice Vouchers to households with children who attend a school with an exceptionally high level of turnover to help stabilize the student population. THA believes this approach will help to improve educational out-comes, add stability to the neighborhood, and create a better learning environment for the community as a whole.
- THA is adjusting administrative staff as necessary to ensure that activities are in line with the agreement. THA is in the midst of making necessary technological enhancements that will benefit the organization and the residents.
- THA is analyzing its administrative overhead and charge expenses directly to the programs whenever possible. The agency is charging administrative or previously allocated costs to a Program Support Center for each of its three activity areas as identified in the Local Asset Management Plan, along with a Community Services Central fund to track expenses associated with those functions. • THA wrote an activity in its 2012 amended plan that allows the agency to activate the single fund flexibility and to spend MTW money on the development, and preservation of affordable housing.
- THA is partnering with local agencies in the community to create local non-traditional housing programs. The programs are funded by THA but run by partnering agencies in the community.

B. MTW Plan: Local Asset Management Plan

| | | | |
|---|--|----|---|
| Is the PHA allocating costs within statute? | <input type="checkbox"/> | or | <input checked="" type="checkbox"/> No |
| Is the PHA implementing a local asset management plan (LAMP)? | <input checked="" type="checkbox"/> Yes | or | <input type="checkbox"/> |
| <p>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. The narrative shall explain the deviations from existing HUD requirements and should be updated if any changes are made to the LAMP.</p> | | | |
| Has the PHA provided a LAMP in the appendix? | <input checked="" type="checkbox"/> Yes | or | <input type="checkbox"/> |
| <p align="center">There are no major changes in the LAMP between 2014 and 2015</p> | | | |

SECTION VI: ADMINISTRATIVE

VI.A: Board Resolution and Certification of Compliance



TACOMA HOUSING AUTHORITY

RESOLUTION 2015-1-28 (1)

DATE: January 28, 2015
TO: Board of Commissioners
FROM: Michael Mirra, Executive Director
RE: MTW Certification of Compliance

Background:

Each year, THA submits its annual MTW Plan in October and receives comments back by the 1st of January. This year, THA received these comments on December 2nd. The comments noted that THA needed to submit a new Certification of Compliance with its 2015 MTW Plan. The Certification of Compliance is a standard HUD document that ensures PHA compliance with various HUD rules. Prior to submission of the 2015 Plan, the form had been revised by HUD. In order to complete the submission of THA's 2015 MTW Plan, THA must submit the revised certification. This resolution will allow me to do that.

The additional certifications in the revised form are as follows:

- 1) The PHA certifies that the Board of Directors has reviewed and approved the budget for the Capital Fund Program grants contained in the Capital Fund Program Annual Statement/Performance and Evaluation Report, form HUD-50075.1.
- 2) The Plan is consistent with the applicable comprehensive housing affordability strategy (or any plan incorporating such strategy) for the jurisdiction in which the PHA is located.
- 3) The Plan contains a certification by the appropriate State or local officials that the Plan is consistent with the applicable Consolidated Plan, which includes a certification that requires the preparation of an Analysis of Impediments to Fair Housing Choice, for the PHA's jurisdiction and a description of the manner in which the PHA Plan is consistent with the applicable Consolidated Plan.

Work completed to comply with additional certifications:

- THA submitted HUD form 50075.1 to the MTW office in December 2014. The MTW office accepted the form and THA is in compliance with this requirement.
- THA reviewed Pierce County's 2010-2015 Five Year Consolidated Plan and the City of Tacoma's 2014-2015 Annual Action Plan. The following table shows a comparison of how the three agency plans are consistent in their strategies to provide housing assistance, prevent homelessness and to preserve and create affordable housing units. The organization of the table shows the MTW activity in the first column; the subsequent columns explain the relation of the activity to the strategic objectives of the associated plans.

| Tacoma Housing Authority MTW Plan Activities | Activity's Relation to Pierce County Five Year Consolidated Plan Goals and Objectives | Activity's Relation to City of Tacoma Annual Action Plan Goals and Objectives |
|--|---|--|
| <p>Alternative Reaction to Insufficient Funding: This activity would allow THA to change the subsidy amounts each household receives in order to prevent households from program termination in the event of insufficient funding from HUD.</p> | <ul style="list-style-type: none"> • Advocate for other housing and supportive services organizations and systems that focus on the root causes of homelessness and provide homelessness prevention services. | <ul style="list-style-type: none"> • Decent Housing: Preserve existing affordable owner and rental housing. |
| <p>Regional Approach for Special Purpose Housing: THA is using this activity to fund an unaccompanied youth housing program and add funds to the rapid rehousing program for Pierce County.</p> | <ul style="list-style-type: none"> • Work with existing leadership efforts to steward and promote the implementation of the Homeless Housing Plan. • Coordinate with other homeless, planning efforts to expand affordable housing and create living wage jobs. • Focus funding and planning efforts on the development of rapid rehousing projects that eliminate the need for expansion of the emergency housing system. | <ul style="list-style-type: none"> • Suitable Living Environment: Enhance the supportive services delivery system to prevent homelessness and reduce new homelessness, increase economic self-sufficiency, and support households in accessible housing. • Decent Housing: Provide assistance for continuum of housing for persons with special needs, homeless persons, and people at risk of homelessness. |
| <p>Creation and Preservation of Affordable Housing: This initiative allows THA to use its MTW funds to provide low-income families the opportunity to reside in safe, decent, and sanitary housing while paying affordable rents.</p> | <ul style="list-style-type: none"> • Maintain and preserve the existing affordable housing stock. • Expand housing opportunities for extremely low-income, very low-income, and moderate-income households through an increase in the supply of decent, safe and affordable rental housing and rental assistance. | <ul style="list-style-type: none"> • Decent Housing: Preserve existing owner and renter housing; develop new affordable housing in support of neighborhood and downtown revitalization; and provide assistance for continuum of housing for persons with special needs, homeless persons, and people at risk of homelessness. |

| Tacoma Housing Authority MTW Plan Activities | Activity's Relation to Pierce County Five Year Consolidated Plan Goals and Objectives | Activity's Relation to City of Tacoma Annual Action Plan Goals and Objectives |
|--|---|---|
| <p>Housing Opportunity Program (HOP): All new admissions to the tenant based voucher program (traditionally, Section 8) receive a HOP voucher. A HOP voucher is a fixed subsidy as opposed to a subsidy based on income. That includes senior/disabled households. Work-able households have a five year time limit on their assistance. Senior/disabled households do not have a time limit. THA works closely with work-able households to increase the household's economic self-sufficiency by the end of the five year time limit.</p> | <ul style="list-style-type: none"> Expand housing opportunities for extremely low-income, very low-income, and moderate-income households through an increase in the supply of decent, safe and affordable rental housing and rental assistance. | <ul style="list-style-type: none"> Suitable Living Environment: Enhance the supportive services delivery system to prevent homelessness and reduce new homelessness, increase economic self-sufficiency, and support households in accessible housing. |
| <p>College Housing Assistance Program: THA partnered with the Tacoma Community College (TCC) where THA provides rental assistance to homeless students at the community college. TCC provides services designed to help the families succeed so they are ready to be independent of housing subsidies after graduation. The program offers the same fixed subsidies as the HOP program and has a three year limit on assistance.</p> | <ul style="list-style-type: none"> Expand housing opportunities for extremely low-income, very low-income, and moderate-income households through an increase in the supply of decent, safe and affordable rental housing and rental assistance. | <ul style="list-style-type: none"> Suitable Living Environment: Enhance the supportive services delivery system to prevent homelessness and reduce new homelessness, increase economic self-sufficiency, and support households in accessible housing. |
| <p>Security and Utility Deposit Assistance Program: This program will be open to all THA applicants/residents who are in need of assistance in order to move into a unit. THA realizes it is very difficult when a households name comes to the top of a waitlist and the applicant does not have the resources to pay the security deposit. This program will ensure that families in need can afford to move into the unit when their name is called.</p> | <ul style="list-style-type: none"> Expand housing opportunities for extremely low-income, very low-income, and moderate-income households through an increase in the supply of decent, safe and affordable rental housing and rental assistance. | <ul style="list-style-type: none"> Decent Housing: Provide support to preserve quality and habitability of rental housing. |

-
- THA has requested that representatives from Pierce County and the City of Tacoma review the plan comparison and provide a certification stating that the plan is consistent with city and county policies.

NOTE: The resolution has an unfamiliar format because it is a HUD form.

Recommendation:

Approve Resolution 2015-1-28 (1) authorizing the Executive Director to submit the Housing Authority of the City of Tacoma's Fiscal Year 2015 Certifications of Compliance Form.



TACOMA HOUSING AUTHORITY

RESOLUTION 2015-1-28 (1)

Certifications of Compliance

**Annual Moving to Work Plan
Certifications of Compliance**

**U.S. Department of Housing and Urban
Development, Office of Public and Indian
Housing**

Certifications of Compliance with Regulations: Board Resolution to Accompany the Annual Moving to Work Plan*

Acting on behalf of the Board of Commissioners of the Public Housing Agency (PHA) listed below, as its Chairman or other authorized PHA official if there is no Board of Commissioners, I approve the submission of the Annual Moving to Work Plan for the PHA fiscal year beginning 2015, hereinafter referred to as "the Plan", of which this document is a part and make the following certifications and agreements with the Department of Housing and Urban Development (HUD) in connection with the submission of the Plan and implementation thereof:

1. The PHA published a notice that a hearing would be held, that the Plan and all information relevant to the public hearing was available for public inspection for at least 30 days, that there were no less than 15 days between the public hearing and the approval of the Plan by the Board of Commissioners, and that the PHA conducted a public hearing to discuss the Plan and invited public comment.
2. The PHA took into consideration public and resident comments (including those of its Resident Advisory Board or Boards) before approval of the Plan by the Board of Commissioners or Board of Directors in order to incorporate any public comments into the Annual MTW Plan.
3. The PHA certifies that the Board of Directors has reviewed and approved the budget for the Capital Fund Program grants contained in the Capital Fund Program Annual Statement/Performance and Evaluation Report, form HUD-50075.1.
4. The PHA will carry out the Plan in conformity with Title VI of the Civil Rights Act of 1964, the Fair Housing Act, section 504 of the Rehabilitation Act of 1973, and title II of the Americans with Disabilities Act of 1990.
5. The Plan is consistent with the applicable comprehensive housing affordability strategy (or any plan incorporating such strategy) for the jurisdiction in which the PHA is located.
6. The Plan contains a certification by the appropriate State or local officials that the Plan is consistent with the applicable Consolidated Plan, which includes a certification that requires the preparation of an Analysis of Impediments to Fair Housing Choice, for the PHA's jurisdiction and a description of the manner in which the PHA Plan is consistent with the applicable Consolidated Plan.

7. The PHA will affirmatively further fair housing by examining its programs or proposed programs, identify any impediments to fair housing choice within those programs, address those impediments in a reasonable fashion in view of the resources available and work with local jurisdictions to implement any of the jurisdiction's initiatives to affirmatively further fair housing that require the PHA's involvement and maintain records reflecting these analyses and actions.

8. The PHA will comply with the prohibitions against discrimination on the basis of age pursuant to the Age Discrimination Act of 1975.

9. The PHA will comply with the Architectural Barriers Act of 1968 and 24 CFR Part 41, Policies and Procedures for the Enforcement of Standards and Requirements for Accessibility by the Physically Handicapped.

10. The PHA will comply with the requirements of section 3 of the Housing and Urban Development Act of 1968, Employment Opportunities for Low-or Very-Low Income Persons, and with its implementing regulation at 24 CFR Part 135.

11. The PHA will comply with requirements with regard to a drug free workplace required by 24 CFR Part 24, Subpart F.

12. The PHA will comply with requirements with regard to compliance with restrictions on lobbying required by 24 CFR Part 87, together with disclosure forms if required by this Part, and with restrictions on payments to influence Federal Transactions, in accordance with the Byrd Amendment and implementing regulations at 49 CFR Part 24.

13. The PHA will comply with acquisition and relocation requirements of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 and implementing regulations at 49 CFR Part 24 as applicable.

14. The PHA will take appropriate affirmative action to award contracts to minority and women's business enterprises under 24 CFR 5.105(a).

15. The PHA will provide HUD or the responsible entity any documentation needed to carry out its review under the National Environmental Policy Act and other related authorities in accordance with 24 CFR Part 58. Regardless of who acts as the responsible entity, the PHA will maintain documentation that verifies compliance with environmental requirements pursuant to 24 Part 58 and 24 CFR Part 50 and will make this documentation available to HUD upon its request.

16. With respect to public housing the PHA will comply with Davis-Bacon or HUD determined wage rate requirements under section 12 of the United States Housing Act of 1937 and the Contract Work Hours and Safety Standards Act.

17. The PHA will keep records in accordance with 24 CFR 85.20 and facilitate an effective audit to determine compliance with program requirements.

18. The PHA will comply with the Lead-Based Paint Poisoning Prevention Act and 24 CFR Part 35.

19. The PHA will comply with the policies, guidelines, and requirements of OMB Circular No. A-87 (Cost Principles for State, Local and Indian Tribal Governments) and 24 CFR Part 85 (Administrative Requirements for Grants and Cooperative Agreements to State, Local and Federally Recognized Indian Tribal Governments).

20. The PHA will undertake only activities and programs covered by the Plan in a manner consistent with its Plan and will utilize covered grant funds only for activities that are approvable under the Moving to Work Agreement and Statement of Authorizations and included in its Plan.

21. All attachments to the Plan have been and will continue to be available at all times and all locations that the Plan is available for public inspection. All required supporting documents have been made available for public inspection along with the Plan and additional requirements at the primary business office of the PHA and at all other times and locations identified by the PHA in its Plan and will continue to be made available at least at the primary business office of the PHA.

Housing Authority of the City of Tacoma
PHA Name

WA005
PHA Number/HA Code

I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate. Warning: HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

Stanley Rumbaugh
Name of Authorized Official

Chair
Title


Signature

1/28/15
Date

*Must be signed by either the Chairman or Secretary of the Board of the PHA's legislative body. This certification cannot be signed by an employee unless authorized by the PHA Board to do so. If this document is not signed by the Chairman or Secretary, documentation such as the by-laws or authorizing board resolution must accompany this certification.



City of Tacoma
Community and Economic Development Department

January 21, 2015

Sheryl Stansell, Analyst
Tacoma Housing Authority
902 South L
Tacoma WA 98405

RE: Consistency with City of Tacoma's Consolidated Plan

Dear Sheryl:

You requested a determination of consistency with the City of Tacoma's *Consolidated Plan* and support for the Tacoma Housing Authority's (THA) Annual Action Plan 2015. This plan further promotes THA's Moving to Work initiatives, including creatively working with a regional approach to address housing needs for homeless youth and utilizing the flexibility offered under the Moving to Work program to serve more households, including households that cannot access rental assistance through traditional means. Through their use of project-based vouchers, THA has been an invaluable partner in the development of affordable housing opportunities allowing for deeper subsidies in these projects to serve the lowest income households.

This proposal is consistent with the City of Tacoma's *Consolidated Plan for Housing and Community Development 2010-2015*. This plan is dated May 5, 2010 and was approved by the U.S. Department of Housing & Urban Development (HUD) on July 13, 2010. It is the implementation document for the City's *Comprehensive Plan* and is administered by the City's Housing Division of the Community & Economic Development Department. Specifically, sections 6 and 7 of the *Consolidated Plan* address the high priority placed on preserving and developing Tacoma's affordable housing opportunities for low-income households.

If you have any additional questions or require additional information, please contact Cathy Morton at 253-591-5763, or via e-mail at cmorton@cityoftacoma.org.

Sincerely,

Martha Anderson
Assistant Director

747 Market Street, Room 900 ☎ Tacoma, Washington 98402-3793 ☎ (253) 591-5364
<http://www.cityoftacoma.org>

VI:B: Public Hearing Notice and Evidence of Community and Resident Communication:



2015 Moving To Work (MTW) Planning

Each year, the Tacoma Housing Authority (THA) turns in a plan to the Department of Housing and Urban Development (HUD). In this plan, THA tells HUD how we will use our budget. *THA invites you to help us decide what to put in the plan!*

Please join us at the **Family Investment Center in Salishan** on one of the following dates to hear about this year's activity:

| | |
|---|---|
| August 20th 6 – 8 pm Family Investment Center (Salishan) 1724 E 44th Street Tacoma, WA 98404 | August 25th 6 – 8 pm Family Investment Center (Salishan) 1724 E 44th Street Tacoma, WA 98404 |
|---|---|

A policy change THA is considering with its 2015 MTW Plan:

It does not look like Congress will cut THA's budget in 2015. It is too soon to tell. But THA needs to be ready if cuts do happen. If Congress cuts THA's budget a lot, THA may have only two ways to respond. First, THA could cut people off its programs. THA wants to avoid doing this. Instead, THA will propose in the 2015 plan that it could "thin the soup" and ask everyone to accept less so no one will lose their assistance. THA did a version of this for new people on our Housing Opportunity Program (HOP). The savings allowed us to manage the 2013 budget cuts without cutting anyone completely from our programs. If there is a similar budget cut in 2015, THA's proposal would allow it to respond in a similar way.

You can review the draft 2015 MTW Plan on THA's website at: www.tacomahousing.net/content/moving-work-0

We welcome public comments **August 1st through August 30th, 2014**. To comment or to ask questions, please email sstansell@tacomahousing.org or call 253.448.2795. You can also ask for interpreters and special accommodations.

THA is also considering rent reform:

(Note: this will not be a topic for the 2015 MTW public hearing process)

Budget cuts are likely in 2016. THA has to prepare for them. THA might apply some version of HOP to all households. Before making that decision, THA will study the best option. THA will look at time limits, fixed subsidies and the best practices for community services. To help us choose the best policy, we are looking for help and suggestions.

Do you have comments or suggestions related to rent reform? THA is looking for HOP and Housing Choice Voucher participants and landlords to talk with us.
Please email rentreform@tacomahousing.org or call (253) 448-2795 if you are interested in helping us.

2015 Moving to Work Public Comments

| SOURCE OF COMMENT | DATE | 2015 MTW Activity | Question/Comment | THA Response |
|--------------------------|-------------|---|---|---|
| Public | 8.20.14 | Change to the <i>Insufficient Funding</i> section of the Admin Plan | I think it is a good idea to give everyone less in the event of insufficient funding, and I am generally supportive of the program. | THA continues to do its best to not terminate families from receiving assistance. THA will continue to strive for this. |
| Public | 8.25.14 | Change to the <i>Insufficient Funding</i> section of the Admin Plan | If you cut money to the households, are they then responsible to come up with the rest? | Yes. |
| Public | 8.25.14 | Change to the <i>Insufficient Funding</i> section of the Admin Plan | If income goes up, does subsidy go down? | No. |
| Public | 8.25.14 | Change to the <i>Insufficient Funding</i> section of the Admin Plan | Does this apply to people with disabilities? | The fixed subsidy, yes. The five year time limit, no. |
| Public | 8.25.14 | Change to the <i>Insufficient Funding</i> section of the Admin Plan | When was HOP implemented? | 2012. |
| Public | 8.25.14 | Change to the <i>Insufficient Funding</i> section of the Admin Plan | How did the lottery work when you first opened the HOP waitlist? | There were 7,000 applicants and we did a lottery to fill 1,000 spots on the waitlist. |
| Public | 8.25.14 | Change to the <i>Insufficient Funding</i> section of the Admin Plan | How many HOP households do you admit each year? | We try to house 250 households per year from the waitlist. |
| Public | 8.25.14 | Change to the <i>Insufficient Funding</i> section | Are the eligibility qualifications the same as HCV? | Yes. |

| SOURCE OF COMMENT | DATE | 2015 MTW Activity | Question/Comment | THA Response |
|-------------------|---------|---|---|--|
| | | of the Admin Plan | | |
| Public | 8.25.14 | Change to the <i>Insufficient Funding</i> section of the Admin Plan | What is the hold up for housing? Is it a funding shortage or a housing shortage? | We can only admit additional households if we get additional funding from HUD. |
| Public | 8.25.14 | Change to the <i>Insufficient Funding</i> section of the Admin Plan | What happens when a household turns in their voucher? | The voucher is not distributed to a new household; rather it is converted to HOP and serves 1.5 households. |
| Public | 8.25.14 | Change to the <i>Insufficient Funding</i> section of the Admin Plan | What age is MTW for? | MTW is not for a specific age group, it is a designation that allows THA to spend its dollars differently. |
| Public | 8.25.14 | Change to the <i>Insufficient Funding</i> section of the Admin Plan | If an individual receives SSI, are they considered disabled? | Yes. |
| Public | 8.25.14 | Change to the <i>Insufficient Funding</i> section of the Admin Plan | Why did THA change to the 2 person standard? | To serve more households. |
| Public | 8.25.14 | Change to the <i>Insufficient Funding</i> section of the Admin Plan | I think the 2 person standard rule is bad because of the potential mixed family scenarios. For example, a teenage girl and her dad would have to sleep in the same room by THA standards. | THA received a lot of feedback from the public before making this change. Ultimately, THA does not and will not tell residents where to sleep. |
| Public | 8.25.14 | Change to the <i>Insufficient Funding</i> section of the Admin Plan | Does Pierce County Housing Authority have the same payment standards | Each PHA does it differently; we are not sure how PCHA determines voucher |

| SOURCE OF COMMENT | DATE | 2015 MTW Activity | Question/Comment | THA Response |
|-------------------|---------|---|---|--|
| | | Plan | based on bedroom size? | size. |
| Public | 8.25.14 | Change to the <i>Insufficient Funding</i> section of the Admin Plan | Where does the funding come from? | HUD. |
| Public | 8.25.14 | Change to the <i>Insufficient Funding</i> section of the Admin Plan | Funding problems did not exist before, why has there been a change? | HCV and PH budgets have been declining over the past years. |
| Public | 8.25.14 | Change to the <i>Insufficient Funding</i> section of the Admin Plan | If someone finds a job while on HOP, will you terminate? | HOP families income out of the program at 80% AMI |
| Public | 8.25.14 | Change to the <i>Insufficient Funding</i> section of the Admin Plan | If THA decides to make this change to the Admin Plan, what will happen? | We will take the proposal to public comment again. |
| Public | 8.25.14 | Change to the <i>Insufficient Funding</i> section of the Admin Plan | If a voucher becomes available, does it convert to HOP? | Yes. |
| Public | 8.25.14 | Change to the <i>Insufficient Funding</i> section of the Admin Plan | Are there still households that receive a HCV? | Yes. |
| Public | 8.25.14 | Change to the <i>Insufficient Funding</i> section of the Admin Plan | How often is a recertification done? | Hop: annually HCV: every two years |
| Landlord | 8.26.14 | HOP | The initial HOP subsidy should be calculated based on the household | This is a great insight, but, we will have separate focus groups to discuss HOP. You |

| SOURCE OF COMMENT | DATE | 2015 MTW Activity | Question/Comment | THA Response |
|-------------------|---------|---|--|--|
| | | | income and follow a tiered rent system until they are self-sufficient. | will be put on the list of interested participants. |
| Landlord | 8.26.14 | Change to the <i>Insufficient Funding</i> section of the Admin Plan | How does expanding HOP help the PHA save dollars? | It is cheaper to administer HOP. |
| Landlord | 8.26.14 | Change to the <i>Insufficient Funding</i> section of the Admin Plan | PBVs are only beneficial to the landlords that own the building. | PBVs are not placed in private units. |
| Landlord | 8.26.14 | Change to the <i>Insufficient Funding</i> section of the Admin Plan | I like the rapid rehousing model; can THA expand this program instead? | THA is currently investing in rapid rehousing; THA will receive data back before deciding whether or not to expand. |
| Landlord | 8.26.14 | Change to the <i>Insufficient Funding</i> section of the Admin Plan | Programs that are specific to schools (i.e. McCarver and Tacoma Community College) concentrate poverty in the areas around the school. | The participants in these programs receive vouchers that can be used anywhere in THA's jurisdiction. |
| Landlord | 8.26.14 | Change to the <i>Insufficient Funding</i> section of the Admin Plan | If there is a government shutdown, will I still get my HAP check? | THA will not shut down if the federal government does. THA projects that it will be able to maintain operations for 45 days. |

VI:C: Description of any planned or ongoing PHA directed evaluations of the demonstration for the overall MTW program or any specific MTW activities, if applicable:

N/A

VI.D: Capital Funds Documents: Electronic copies will include a separate email because of HUD mailbox limitations:

APPENDICES

Appendix A: RHF Plan

Appendix B: Local Asset Management Plan

Appendix C: Commitments for Moving to Work Reserves

Appendix D: RAD Significant Amendment

APPENDIX A: REPLACEMENT HOUSING FACTOR PLAN (RHF PLAN)

THA has received first increment RHF funds as a result of the disposition of 512 public housing units at the Salishan site, 104 units at Hillside Terrace 2500/1800 blocks and 38 PH units at Hillside Terrace 2300 Block. THA began receiving the first increment of RHF funds in 2004. THA is utilizing a portion of these funds to repay a Capital Funding Financing Plan Bond that was used to assist with the financing of the rebuilding of the Salishan neighborhood. THA plans to utilize the remaining RHF funds pursuant to Option 3 of THA’s MTW Agreement. THA intends to combine RHF funds into the MTW Block Grant. THA intends to accumulate the RHF grants for up to five years, and be eligible for the second increment of RHF funds. THA will use RHF funds on affordable housing.

The subject grants are:

| Grant Number | Amount | Project-Increment |
|---------------------------------|-----------------------|--|
| WA19R005501-10 | \$1,337,436 | Salishan (198 units) Year 5 out of 5 Salishan (29 units) Year 3 out of 5 Salishan (191 units) Year 3 out of 5 Salishan (37 units) Year 3 out of 5 Salishan(57 units) Year 1 out of 5 |
| WA19R005501-11 | \$734,132 | Salishan (29 units) Year 4 out of 5 Salishan (191 units) Year 4 out of 5 Salishan (37 units) Year 4 out of 5 Salishan(57 units) Year 2 out of 5 |
| WA19R005501-12 | (Estimated) \$659,086 | Salishan (29 units) Year 5 out of 5 Salishan (191 units) Year 5 out of 5 Salishan (37 units) Year 5 out of 5 Salishan(57 units) Year 3 out of 5 |
| WA19R005501-13 | (Estimated) \$119,643 | Salishan(57 units) Year 4 out of 5 |
| WA19R005501-14 | (Estimated) \$337,939 | Salishan(57 units) Year 5 out of 5 Hillside Terrace 2500/1800 (104 units) Year 1 out of 5 |
| WA19R005501-15 | (Estimated) \$218,296 | Hillside Terrace 2500/1800 (104 units) Year 2 out of 5 |
| WA19R005501-16 | (Estimated) \$218,296 | Hillside Terrace 2500/1800 (104 units) Year 3 out of 5 |
| WA19R005501-17 | (Estimated) \$218,296 | Hillside Terrace 2500/1800 (104 units) Year 4 out of 5 |
| WA19R005501-17 | (Estimated) \$218,296 | Hillside Terrace 2500/1800 (104 units) Year 5 out of 5 |
| 1st Increment before deductions | \$4,061,420 | |
| Minus CFFP Bond Payment | \$1,082,341 | |
| Final Total 1st | \$2,979,079 | |

| | | |
|-----------|--|--|
| Increment | | |
|-----------|--|--|

This funding will be used to fill gaps in financing as needed to develop affordable housing units at the in Tacoma, Washington. THA will ensure that the requisite number of affordable housing units required under the “Proportionality Test” will be developed.

It is THA’s understanding from the information posted on the HUD Capital Fund webpage that the obligation end date for these funds will be October 2016 and the disbursement date will be October 2018.

Second Increment Funding

THA has received second increment Replacement Housing Factor (RHF) funds as a result of the disposition of 38 public housing units at Hillside Terrace 2300 Block and 512 public housing units at Salishan. THA plans to utilize these RHF funds pursuant to Option 3 of THA’s MTW Agreement. THA intends to combine RHF funds into the MTW Block Grant. THA intends to accumulate the RHF grants for up to five years. The RHF funds will be used on affordable housing.

The subject grants are:

| Grant Number | Amount | Project-Increment |
|----------------|---------------------------|---|
| WA19R005502-10 | \$99,262.84 | Hillside Terrace (14 units) Year 2 out of 5 Hillside Terrace (24 units)Year 1 out of 5 |
| WA19R005502-11 | \$551,768 | Hillside Terrace (14 units) Year 3 out of 5 Hillside Terrace (24 units)Year 2 out of 5 Salishan (198 units) Year 1 out of 5 |
| WA19R005502-12 | \$495,364 | Hillside Terrace (14 units) Year 4 out of 5 Hillside Terrace (24 units)Year 3 out of 5 Salishan (198 units) Year 2 out of 5 |
| WA19R005502-13 | (Estimate) \$1,034,807 | Hillside Terrace (14 units) Year 5 out of 5 Hillside Terrace (24 units)Year 4 out of 5 Salishan (198 units) Year 3 out of 5 Salishan (29 units) Year 1 out of 5 Salishan (191 units) Year 1 out of 5 Salishan (37 units) Year 1 out of 5 |
| WA19R005502-14 | (Estimate) \$1,005,421 | Hillside Terrace (24 units)Year 5 out of 5 Salishan (198 units) Year 4 out of 5 Salishan (29 units) year 2 out of 5 Salishan (191 units) Year 2 out of 5 Salishan (37 units) Year 2 out of 5 |

| Grant Number | Amount | Project-Increment |
|----------------------------------|---------------------------|---|
| WA19R005502-15 | (Estimate) \$1,074,688 | Salishan (198 units) Year 5 out of 5 Salishan (29 units) Year 3 out of 5 Salishan (191 units) Year 3 out of 5 Salishan (37 units) Year 3 out of 5 Salishan (57 units) Year 1 out of 5 |
| WA19R005502-16 | (Estimate) \$659,086 | Salishan (29 units) Year 4 out of 5 Salishan (191 units) Year 4 out of 5 Salishan (37 units) Year 4 out of 5 Salishan (57 units) Year 2 out of 5 |
| WA19R005502-17 | (Estimate) \$659,086 | Salishan (29 units) Year 5 out of 5 Salishan (191 units) Year 5 out of 5 Salishan (37 units) Year 5 out of 5 Salishan (57 units) year 3 out of 5 |
| WA19R005502-18 | (Estimate) \$119,643 | Salishan (57 units) Year 4 out of 5 |
| WA19R005502-19 | (Estimate) \$119,643 | Salishan (57 units) Year 5 out of 5 |
| 2nd Increment before deductions | \$5,818,762.00 | |
| Minus CFFP Bond Payment | \$2,015,062 | |
| Final Total 2nd Increment | \$3,803,700. | |

THA will ensure that the requisite number of affordable housing units required under the “Proportionality test” will be developed.

It is THA’s understanding from the information posted on the HUD Capital Fund webpage that the obligation end date for grant numbers WA19R005502-10 through WA19R005502-14 is October 2016. The disbursement end date will be October 2018. The obligation end date for grant numbers WA19R005502-15 through WA19R005502-19 is October 2021. The disbursement end date will be October 2023. THA will develop new units in accordance with the requirements found in THA’s MTW Agreement and will meet the newly established obligation and disbursement deadlines

THA confirms its RHF Amendment was submitted to HUD on March 1st 2012. THA is in compliance with the obligation and expenditure deadlines on all of its Capital Fund Grants and is current on its LOCCS reporting. THA understands that it must obtain a firm commitment of substantial additional funds other than public housing funds to meet the leverage requirement. When the leveraged funds are secured, THA will submit written documentation confirming the funding.

APPENDIX B: LOCAL ASSET MANAGEMENT PLAN

A. Background and Introduction

The First Amendment to the Amended and Restated Moving to Work Agreement authorizes Tacoma Housing Authority (THA) to design and implement a Local Asset Management Program (LAMP) for its Public Housing Program and describe this program in its Annual MTW Implementation Plan. The term “Public Housing Program” means the operation of properties owned or units in mixed-income communities subsidized under Section 9 of the U.S. Housing Act of 1937, as amended (“1937 Act”) by the Agency that are required by the 1937 Act to be subject to a public housing declaration of trust in favor of HUD. The Agency’s LAMP shall include a description of how it is implementing project-based property management, budgeting, accounting, and financial management and any deviations from HUD’s asset management requirements. Further, the plan describes its cost accounting plan as part of its LAMP, and in doing so it covers the method for accounting for direct and indirect costs for the Section 8 Program as well.

In 2012, THA changed the structure of property management operations in order to achieve greater efficiencies. The new structure is described in Section C below. Since 2007, THA has operated using project-based budgeting with on-site administrative and maintenance personnel responsible for the majority of the tasks associated with managing the properties. THA will modify somewhat the cost approach as described in the previous year’s LAMP. This cost approach continues to eliminate all current allocations and book all indirect revenues and expenses to a Program Support Center and then charges fees to the programs and properties as appropriate.

B. Guiding Principles

The City of Tacoma established the Tacoma Housing Authority under State of Washington enabling legislation in 1940 through resolution. The resolution states that the City formed the Housing Authority to address a “shortage of safe and sanitary dwelling accommodations in the City of Tacoma, Washington available to persons of low-income at rentals they can afford.”

Since then, THA has strived to meet the ever-increasing demands for low-income housing in the Tacoma area. With acceptance into the Moving to Work (MTW) program in 2010, THA took on three additional statutory objectives that further define the Agency’s role on both a local and a national scale. THA is required to keep these objectives in mind through the development of each activity related to MTW, including the development of the LAMP. The three statutory objectives are: 1) reduce cost and achieve greater cost effectiveness in Federal expenditures; 2) give incentives to families with children whose heads of household are either working, seeking work, or are participating in job training, educational or other programs that assist in obtaining employment and becoming economically self sufficient; and 3) increase housing choices for low-income families [Section 204(a) of the 1996 Appropriations Act].

C. Description of Asset-Based Operations

Overview of Organizational Structure

THA’s Real Estate Management and Housing Services (REMHS) Department is responsible for the day-to-day operations of THA’s portfolio and the Administration Department is responsible for

Asset Management and compliance. The chart below shows this relationship and the positions responsible for these management functions.

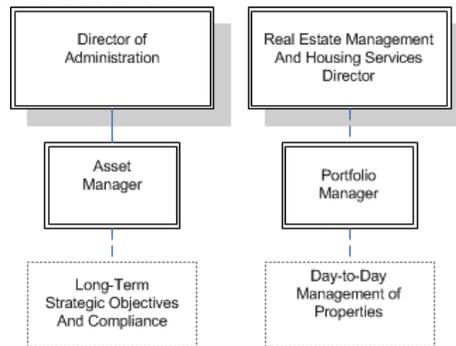


Figure 1: Organizational Structure

Description of 2015 Plan

THA’s 2011 LAMP described a distinction between the method in which it managed its “conventional” AMPs and the Salishan portfolio. THA decided to manage these areas differently in order to capitalize on the efficiencies of managing Salishan as a larger property.

THA restructured its entire portfolio in 2012 in order to achieve the operational efficiencies desired in Salishan. Rather than managing different types of properties in the same AMP, THA changed it’s management groupings into Elderly/Disabled properties and Family properties. The agency has already grouped its Salishan properties into a centralized management group rather than managing seven Salishan properties as separate entities. THA has made the same conversion for it’s Hillside Terrace properties. A Portfolio Manager oversees all of THA’s managed properties, including Public Housing, Local Fund, and Tax Credit Properties. The chart below shows this management structure.

Asset and Compliance Management

While the Property Management Division oversees the day-to-day operations of the properties, THA’s Asset Management and Compliance Division oversees the long-term strategic objectives of the properties. Having an Asset Management and Compliance Division enables THA to effectively plan for the future, ensure compliance with Local and HUD regulations, and keep the agency’s strategic objectives at the forefront when making both operational and strategic decisions. Included within the scope of this division are the following responsibilities:

- Risk Management
- Compliance (file audits, PIC, finding resolution)
- Budget Oversight
- Financial Reporting and Modeling
- Capital Needs Assessment
- AMP Performance Review
- Strategic Planning
- Policy Development and Implementation
- AMP Procurement Regulation

Project-Level Reporting

THA instituted project-based budgeting and accounting practices in 2007. In 2008, THA Finance staff developed systems and reports to facilitate the onsite management of budgets, expenses,

rent collection and receivables, and purchasing; in 2009 the Asset Management division developed reports and financial models to analyze all properties at the project level.

Maintenance Operations

In accordance with HUD Asset Management guidance, THA instituted a decentralized maintenance program in 2008. During 2011, THA realized efficiencies in the maintenance of its Salishan properties by assigning maintenance personnel to the entire Salishan portfolio, rather than each of the individual projects. In 2012, the agency changed its model to apply these efficiencies to the rest of its portfolio, wherever possible. In the new model, there are two separate teams of maintenance personnel, one that is centralized and one that is based at a specific grouping of properties. During 2014, THA changed the model again in order to gain more efficiencies in Maintenance Operations.

During 2014, THA eliminated the centralized maintenance team concept, and re-assigned the entire maintenance staff to fall under the purview of the Maintenance Supervisor. We now have 4 zones that are staffed based on geographical location, with each zone having a maintenance lead to both direct, oversee, and assist in ensuring the team is meeting it's objectives in completion of the maintenance work. The administrative time for staff will be charged out on as an allocation based on the projects in the zone they are located, while the time worked performed in a unit will be charged directly to the project the unit is located. If necessary, a team member from one zone can be assigned to work on a unit in a different zone. That time will be charged to the property the unit is located.

Acquisition of Goods

THA has been operating under a decentralized purchasing model for the acquisition of goods. We are going to a more hybrid method where goods are primarily ordered by site staff for unit turns. We have hired a supply chain analyst to assist with distribution of supplies and ensuring that goods are available to move forward on both unit turns and work orders without disruption to the sites. THA is in the process of making that transition and will monitor it's success.

Acquisition of Services

While the acquisition of goods is decentralized, the agency has adopted a hybrid approach to the acquisition of its services. Centralized duties include the oversight of the contract needs of the sites, management of the bid process, vendor communication, and contract compliance. The sites are responsible for scheduling work, approving invoices, working with the centralized staff to define scopes of work, and ensuring the work is done properly.

D. Strategic Asset Planning

THA's Asset Management Committee

In 2010, THA formed an Asset Management Committee consisting of key members from the following functional areas in the agency: Finance, Asset Management and Compliance, Property Management, Community Services and Real Estate Development. The committee meets on a routine basis. The standing agenda includes reviewing operational costs at each site, investigating large cost variances between the AMPs, analyzing property performance metrics, and comparing cost data and operational data to industry standards. THA also uses financial

models to compare our metrics to properties managed by private firms. The committee also considers any policy changes having a potential impact on the operation of its properties and decisions regarding property acquisition and disposition. Some examples of policy changes discussed here include adoption of a smoke-free policy and changes to THA's current rent policy and occupancy standards.

The overall purpose of the committee is to ensure that THA makes decisions in a way that fosters appropriate communication between the major functional areas concerned with Asset Management and address related issues and concerns from a holistic perspective.

The cost approach developed by THA as described in the next section of this LAMP allows this committee and others in the agency to make informed decisions concerning the agency's portfolio. The cost approach will clearly show which areas of the agency cost the most to run and which provide the most value to the mission of the agency.

E. Cost Approach

THA's current cost approach is to charge all direct costs related to day to day operations to the specific project or program fund and to charge all indirect costs to a central fund (see "Program Support Center" below). The PSC would then earn fees that they charge to the programs they support. Community Service expenses that benefit THA's Affordable Housing properties will be charged out to a direct grant or the Moving to Work program. For purposes of this Cost Approach, the term project refers to any property or AMP that THA manages and the term program refers to the Rental Assistance and Moving to Work programs administered by THA. THA developed this approach for the following reasons:

1. It allows the agency to easily see the costs directly related to the day to day operations of a project or program and determine whether the management of that cost center can support itself. Staff managing the programs and properties will be able to easily discern all related administrative and shared costs. Managers will hold negotiations if costs are determined unreasonable or if the AMP or program cannot support the proposed fees.
2. One of the goals of the MTW program is to increase administrative efficiency. By charging these costs out as a fee, it will be easier in the future to identify the administrative efficiencies at the program/project level and the indirect costs that support them.

Activity Areas

THA created three separate activity areas in order to track what it costs the agency to support different types of activities in which the agency engages. The three activity areas are:

- Conventional Affordable Housing (MTW)
- Tax Credit Management (MTW)
- Business Activities (Non-MTW)

THA decided to separate MTW activities into Conventional Affordable Housing and Tax Credit Management in order to tell how much it costs to manage its Tax Credit Portfolio versus its other affordable housing programs, including Public Housing and Local Fund Properties. THA considers any other activities as Non-MTW activities and the revenues and expenses fall under the Business Activity area.

Program Support Center

Each of the three activity areas (Business Activities, CAH Activities and Tax Credit Activities) will have a Program Support Center (PSC). This is the equivalent of the Central Office Cost Center (COCC) under the HUD Asset Management model and it contains all of the programmatic support costs related to each of the three activity areas. The expenses will be split out to one of the three support centers based on unit equivalency and where the project or program resides to more clearly identify where administrative expenses fall and measure either the profitability or cost to each of the identified areas.

Error! Reference source not found.The end of this plan indicates the breakdown of how the administrative cost portion of the PSC will be charged out.

Direct Costs

Any costs that directly and wholly support a particular project or program will be charged as Direct Costs to the respective project or program. The following chart outlines which costs are considered Direct Costs.

| Program Area | Cost Type | Comments |
|----------------------|--|--|
| Property Management | Personnel Costs | |
| | Office Rent | |
| | Insurance | Includes property and liability insurance directly related to the AMP |
| | Program Support Fees | Fees charged to the properties for administrative overhead and costs allocated out that are not under the direct purview of the managers |
| | Administrative Costs | Includes postage, legal, office supplies, training and travel, mileage, professional services, and eviction costs |
| | Maintenance Costs | Includes materials, maintenance personnel costs, and contracts |
| | Utilities | |
| | Security | |
| | Relocation due to Reasonable Accommodation | |
| | Collection Loss | |
| | PILOT | |
| | Debt Service Payments | |
| | Audit Costs | |
| | Rental Assistance | Personnel Costs |
| Office Rent | | |
| Insurance | | |
| Program Support Fees | | HUD fees and leasing |
| HAP Expenses | | |
| Audit Costs | | |
| Administrative Costs | | Includes postage, legal, office supplies, training and travel, mileage, professional services, and eviction costs |

Table 1: Direct Costs

Indirect Costs (Program Support Fees)

Any indirect costs incurred by THA in support of its projects and programs will be incurred by the Program Support Center. The fees are:

- Administrative Support Fee based on HUD model. This also includes IT, Elderly Service coordinator and leasing cost. We choose not to allocate any costs out to a program or project that is not under their direct control.

Project Support Fee

The Administrative Support Fee will cover the costs of the services provided by the following:

- Executive Department
- Purchasing
- Asset Management, including compliance
- Human Resources Department
- Real Estate Management and Housing Services Director
- Accounting and Financial Services
- Real Estate Development Director and Capital Fund Monitoring
- Information Technology
- Reasonable Accommodations
- Leasing Staff and expenses Elderly Services Coordinator

There will be two separate rates, one for Rental Assistance programs and one for managed housing units. The fee charged to Rental Assistance will be charged to all Rental Assistance Baseline units (MTW Vouchers, FUP, NHT, VASH, etc), and the fee charged to Property Management will be charged to all managed housing units, regardless of occupancy status. The following chart shows how these fees are derived. For Rental Assistance, THA is using the HUD prescribed Management Fee. The Bookkeeping fee is reduced to correspond to a more accurate cost of defined support to the program. The IT fee is also reflective of direct support to the program. On the Managed housing side, THA will use the HUD Management Fee schedule as the base amount. Fees that would be allocated out (leasing, Elderly Services coordinator, IT) are charged as part of the fee in order not to have any expenses allocated out that Property managers do not have any control over.

| Project Support Fee | | | |
|--|-------------------|-----------------------------|-----------------------|
| Fee | Rental Assistance | Property Management -Senior | Property Mgt - Family |
| HUD-Prescribed Management Fee (33.3% of prescribed fee for PM) | \$12.00 | \$47.91 | \$47.91 |
| Bookkeeping Fee | \$6.00 | \$7.50 | \$7.50 |
| HUD-Prescribed Asset Management Fee | \$0.00 | \$10.00 | \$10.00 |
| IT Fee (maintained by IT, but previously charged out as allocated direct charge) | \$2.00 | \$6.00 | \$6.00 |
| Elderly Service Coordinator Fee | | \$16.83 | |
| Leasing Support | \$2.45 | \$7.40 | \$7.40 |
| Total Fee: | \$22.45 | \$95.64 | \$71.41 |

Table 2: Administrative Support Fee Components

For THA's tax credit properties, the agency receives management fees per the entity's operating agreement. THA will reserve the right to use any available excess operating subsidy remaining in the Tax Credit AMP (AMPs 7-16) to cover deficits in the Tax Credit PSC.

Cost Centers

Property Management

Property Management uses of funds includes the Direct Costs and Project Support Fees for all of the properties managed by THA. The Property Management source of funds includes Capital Fund, Tenant Revenue, Operating Subsidy, and Other Revenue.

Rental Assistance

Rental Assistance uses of funds include the Direct Costs and Program Support Fees for all of the voucher programs managed by THA's Rental Assistance Division. These programs include Housing Choice Voucher (HCV), TBRA, SRO/SCO, Project-Based Vouchers, FUP, VASH, NHT, and HUD FSS. The sources for Rental Assistance primarily include HAP Revenue and the Administrative Fees paid to the agency by HUD.

In addition to the fees Rental Assistance pays to the Program Support Center, there are other fees paid and earned in this area. All direct costs for all of the Rental Assistance programs will be recorded in our main Section 8 HCV fund in the MTW program. A fee will then be charged to our SRO and non MTW Section 8 programs based on unit equivalencies. This fee will be income

earned by the MTW Section 8 HCV program for reimbursement of the expenses incurred by them. The chart below shows the equivalencies used.

| Rental Assistance Unit Equivalencies | | |
|--------------------------------------|-----------------|------------|
| CAH (MTW) | Units Supported | Percentage |
| Section 8 | 3543 | 84.92% |
| TPV Vouchers | 253 | 6.06% |
| Non-MTW | Units Supported | Percentage |
| SRO | 81 | 1.94% |
| FUP | 50 | 1.20% |
| VASH | 145 | 3.48% |
| NHT | 100 | 2.40% |

Table 3: Rental Assistance Unit Equivalencies

Community Services

The Community Service department supports all THA's Affordable Housing clientele and assists families to move to Self Sufficiency. As we transition our new Voucher holders over to the Housing Opportunities (HOP) program that is both time limited, and a fixed subsidy program, these services have become more important. Additionally, THA has received a number of grants that provide funding for a variety of services to its clients. The majority of these grants do not come with coverage of administrative overhead. None of the income or expenses for direct grants will be part of the MTW program, but overhead costs not reimbursed by the grants will.

THA's Community Service area has traditionally assisted clients when Property Management staff has requested their assistance to help families remain viable tenants when in crisis. Moving to Work status has allowed the agency to continue that role, along with assisting families in a more pro-active way to move towards self-sufficiency.

THA's Community Service department will either hire caseworkers or collaborate with other agencies to assist families at different levels. Community Services works with families who are facing hardship and cannot meet minimum rent requirements; prepares them to succeed as tenants; and assists tenants in obtaining skills that allow them to become self-sufficient. This is an area THA prides itself in and believes it is a good way to utilize Moving to Work savings.

In the agency's approach to Community Services for the LAMP, the following applies:

- Income and Expenses directly related to a grant is not included in the MTW area.
- All administrative overhead not covered by these grants are charged to a Community Service fund that tracks all MTW costs.
- The Elderly/Disabled Coordinator funded through the Operating Subsidy is charged out as a portion of the management fee to the elderly/disabled projects.

- The costs for the Community Services staff assisting the agency's Property Management portfolio and MTW Voucher holders, along with the administrative costs associated with it, are charged to a Community Services fund supported by the agency's MTW flexibility.
- Costs for both our Education Initiative and Asset Building Programs that are not covered by grant funds would be paid out of MTW funds.

In taking this approach, it allows the Community Services department to operate as a business activity. It is set up in such a manner that THA's Real Estate Management area must negotiate for the level of service it desires, and the cost is known up front.

Development

THA defines development activities to include modernization of the current portfolio, investigation and design of new affordable and market-rate development opportunities, and administration of the Capital Fund Grant. THA also acts as its own developer in building of affordable housing, and is in the process of expanding its role in the Tacoma community. THA's approach to these activities is to charge any activities related to the current stock of affordable housing or activities funded by the Capital Fund to one of the two MTW activity areas. Any time that THA earns a developer fee as a developer, or performs tasks as either a Public Development Entity (PDE) or a Community Development Authority (CDA), all revenues and expenses will be considered Business Activities (Non-MTW).

Based on historic and projected activities, the agency estimates that Development activities make up approximately 10 – 15 % of the agency support. This figure will be reevaluated annually based on the projects in the pipeline, the funding available to support the activities, and current staffing levels. THA is continually on the lookout for how to increase the affordable housing portfolio, and if opportunities arise, THA intends to use its MTW flexibility for development and rehab of affordable housing units. Additionally, THA has applied for a whole portfolio RAD conversion of its Public Housing portfolio, with 50% (primarily Tax Credit PH units) to be converted near the end of 2015 if we are approved. As we are unclear of the status of our application since we are approximately 4,000 units above the current 60,000 unit cap, we have not included any costs in our 2015 budget.

Other Considerations

Personnel

Personnel costs are broken out a number of different ways, depending on which program(s) the staff support, where the funding for the positions comes from, and what the function of each position is.

Rent

THA's main office houses the agency's administrative support staff, the Rental Assistance Division and the Real Estate Development Department. All areas not considered administrative support pay rent for the space used in the main office. The amount of rent charged to each area is determined by the number of square feet occupied in the main office. The per square foot charged to each area is determined by adding up all of the costs to operate the main office and dividing by the total occupied square feet. For FY2015, each area will be charged \$24.24 per square foot per year to occupy the main office. The following chart gives the breakdown of these charges.

| Annual Rent Paid by Program for Main Office Space (\$24.24 / Sq Ft) | | | | | |
|--|-----------------------|--------------------|---------------------------|-----------------------------|------------------|
| Area | Sq. Ft at Main Office | CAH Activity (MTW) | Tax Credit Activity (MTW) | Business Activity (Non-MTW) | TOTALS |
| Rental Assistance | 4,300 | \$91,724 | \$0 | \$12,508 | \$105,952 |
| Real Estate Development | 1,500 | \$12,362 | \$0 | \$23,998 | \$36,360 |
| Total | 5,800 | \$104,086 | \$0 | \$37,108 | \$140,592 |

Table 4 Annual Rent Paid by Program for Main Office Space

All rental revenue and the expense to operate the main office reside in the MTW Program Support Center (PSC). The chart below provides the cost details used to determine rent amounts for FY2015.

| Rent Fund 005 Program Support Center | |
|--|--------------------|
| Income | FY2015 Budget |
| Rental Income | \$140,600 |
| Total Income | \$140,600 |
| Expenses | |
| Depreciation | \$164,700 |
| Maintenance Salaries | \$35,000 |
| Maintenance Benefits | \$11,500 |
| Maintenance Contracts | \$50,000 |
| Maintenance Materials | \$6,000 |
| Utilities | \$42,200 |
| Security | \$7,200 |
| Property Insurance | \$5,500 |
| Total Expenses | \$322,100 |
| Net Income (Loss) | (\$181,500) |

Table 5: Rental Income and Building Expenses

Since the expenses relate to both the administrative staff that reside within the main office building and the areas identified above that pay rent to the PSC, there will always be a loss in the Business Activities PSC. Commencing 2015, we will no longer charge rent to the Property Management units.

F. Differences – HUD Asset Management vs. THA Local Asset Management

THA is required to describe any differences between the Local Asset Management Program and HUD's asset management requirements in its Annual MTW Plan in order to facilitate the recording of actual property costs and submission of such cost information to HUD:

1. THA returned to using the standard Fee for Service as prescribed by HUD as it's base fee. In addition to the fee, there are certain expenses (IT, Leasing, and Elderly service coordinator that could have been allocated out to the projects, but as these expenses are not under the control of the Property Manager we included in the fee structure charged out to the properties.
2. Under this plan, THA renamed its Central Office Cost Center (COCC) to the Program Support Center (PSC) and split it into the three different activity areas. In addition, the PSC will track the program management salaries that cannot be directly attributed to a specific project or program, and therefore would be allocated. The fees will be received in the PSC where the costs that would have been allocated out reside.
3. HUD's rules limit the transfer of cash flow between projects, programs, and business activities. THA intends to use its MTW resources and regulatory flexibility to move its funds and project cash flow among projects that support affordable housing without limitation and to ensure that agency operations best meet THA's mission and serve the agency's low-income clientele.
4. In determining the units to use for the basis of the fee, THA chose to use total units, regardless of occupancy status. This differs from the HUD Asset Management model where Housing Authorities are only allowed to charge management and bookkeeping fees for occupied units in each AMP. THA chose to deviate from the rule for two reasons: 1) THA believes that charging a fee to an AMP for an unoccupied unit will serve as an incentive to the staff to get the unit leased because the AMP is paying a fee on a unit that is not receiving any revenue; and 2) doing so will allow both the AMPs and the administrative staff to budget on a known fee amount, along with covering overhead incurred by the agency whether a unit is leased or not.
5. Under the HUD Asset Management Model the COCC financial information is reported as Business Activities. In THA's LAMP, each activity area has its own Program Support Center (PSC), which is the equivalent of the COCC, and the PSC's that support MTW will be included in the MTW Demonstration Program and the Business Activities PSC will be included in Business Activities column on the FDS.

- G. **Charts** - These charts are based on the information in place at the time of the plan. There may be some changes in property that will impact the actual information in 2015.

Unit Equivalencies

| All Property Management Units | | | | |
|--------------------------------------|------------------------|--------------------|-----------------------|-------------------|
| CAH (MTW) | Units Supported | Unit Factor | Factored Units | Percentage |
| AMP1 | 160 | 1 | 160 | 15.77% |
| AMP2 | 152 | 1 | 152 | 14.98% |
| AMP3 | 144 | 1 | 144 | 14.19% |
| AMP6 | 34 | 1 | 34 | 3.35% |
| | | | | 48.29% |
| Tax Credit (MTW) | Units Supported | Unit Factor | Factored Units | Percentage |
| Tax Credit Properties | 602 | 0.66 | 397.32 | 39.16% |
| | | | | 39.16% |
| Non-MTW | Units Supported | Unit Factor | Factored Units | Percentage |
| 9 Homes | 9 | 1 | 9 | 0.89% |
| North Shirley | 1 | 1 | 1 | 0.10% |
| Stewart Court | 58 | 1 | 58 | 5.72% |
| Wedgewood | 0 | 1 | 0 | 0.00% |
| Salishan 7 | 90 | 0.66 | 59.4 | 5.85% |
| | | | | 12.56% |
| | 1,250 | | 1,015 | 100.00% |

| All REMHS Units - (Operations Coordinator/Compliance/Reasonable Accommodations) | | | | |
|--|------------------------|--------------------|-----------------------|-------------------|
| CAH (MTW) | Units Supported | Unit Factor | Factored Units | Percentage |
| Section 8 | 3796 | 0.33 | 1251 | 48.24% |
| AMP1 | 160 | 1 | 160 | 6.16% |
| AMP2 | 152 | 1 | 152 | 5.85% |
| AMP3 | 144 | 1 | 144 | 5.55% |
| AMP6 | 34 | 1 | 34 | 1.31% |
| | | | | 67.17% |
| Tax Credit (MTW) | Units Supported | Unit Factor | Factored Units | Percentage |
| Tax Credit Properties | 602 | 1 | 602 | 23.18% |
| | | | | 23.18% |
| Non-MTW | Units Supported | Unit Factor | Factored Units | Percentage |
| SRO | 81 | 0.25 | 20 | 0.78% |
| FUP | 50 | 0.25 | 13 | 0.48% |
| NHT | 100 | 0.25 | 25 | 0.96% |
| VASH | 130 | 0.25 | 33 | 1.40% |
| 9 Homes | 9 | 1 | 9 | 0.35% |
| North Shirley | 1 | 1 | 1 | 0.04% |
| Stewart Court | 58 | 1 | 58 | 2.23% |
| Wedgewood | 0 | 1 | 0 | 0.00% |
| Salishan 7 | 90 | 1 | 90 | 3.47% |
| | | | | 9.71% |
| | 5,402 | | 2,592 | 100.00% |

| All REMHS Units (w/o Counting S8 Tax Credit Units Twice) - Leasing | | | | |
|--|-----------------|-------------|----------------|----------------|
| CAH (MTW) | Units Supported | Unit Factor | Factored Units | Percentage |
| Section 8 | 3796 | 0.15 | 571 | 41.05% |
| AMP1 | 160 | 1 | 160 | 11.54% |
| AMP2 | 152 | 1 | 152 | 10.97% |
| AMP3 | 144 | 1 | 144 | 10.39% |
| AMP6 | 34 | 1 | 34 | 2.45% |
| | | | | 76.41% |
| Tax Credit (MTW) | Units Supported | Unit Factor | Factored Units | Percentage |
| Tax Credit Properties (PH) | | 1 | 327 | 23.59% |
| | | | | 23.59% |
| Non-MTW | Units Supported | Unit Factor | Factored Units | Percentage |
| 9 Homes | 9 | 0 | 0 | 0.00% |
| North Shirley | 1 | 0 | 0 | 0.00% |
| Wedgewood | 50 | 0 | 0 | 0.00% |
| Salishan 7 | 90 | 0 | 0 | 0.00% |
| | | | | 0.00% |
| | | | 1,386 | 100.00% |

Table 6: Unit Equivalency Charts

Program Support Center Allocation Detail

| Program Support Center Unit Equivalencies | | | | | |
|---|---|--------------------------|------------------------------------|--|-------------|
| Cost Center | Funding Source | CAH (MTW) Unit Equiv. | Tax Credit (MTW) Unit Equiv. | Business Activities (Non-MTW) Unit Equiv. | Total Units |
| Rental Assistance | Mod Rehab SR0003 | | | 30 | 30 |
| | Mod Rehab SC0002 | | | 10 | 10 |
| | Mod Rehab SR0002 | | | 41 | 41 |
| | Section 8 Vouchers | 3,543 | | | 3,543 |
| | Life Manor TPV Vouchers- Roll into MTW 07/01/12 | 150 | | | 150 |
| | Hillside Terrace Relocation Vouchers – Roll into MTW 07/01/13 | 103 | | | 103 |
| | HUD FSS Grant | N/A | | | 0 |
| | FUP Vouchers | | | 50 | 50 |
| | NHT Vouchers | | | 100 | 100 |
| | VASH Vouchers | | | 145 | 145 |
| Property Management: Local Fund Units | N Shirley | | | 1 | 1 |
| | Alaska 9 Homes | | | 9 | 9 |
| | Wedgewood - 50 Units managed UMS* | | | X | 0 |
| | Salishan 7 | | | 90 | 90 |

| | | | | | |
|--|---|---------------|---------------|---------------|--------------|
| Property Management: Public Housing AMPs | AMP 1 - K.G & M | 160 | | | 160 |
| | AMP 2 - 6th Wright, Fawcett | 152 | | | 152 |
| | AMP 3, Dixon, BT, Lawrence | 144 | | | 144 |
| | AMP 4, Demo'd 2012 | 0 | | | 0 |
| | AMP 6 - Scattered Sites | 34 | | | 34 |
| Property Management: Tax Credit Partnerships | Hillside Terrace | | 21 | | 21 |
| | Hillside Terrace 2 | | 25 | | 25 |
| | Hillside Terrace 1500 Blk | | 16 | | 16 |
| | Bay Terrace | | 70 | | 70 |
| | Salishan 1 | | 90 | | 90 |
| | Salishan 2 | | 90 | | 90 |
| | Salishan 3 | | 90 | | 90 |
| | Salishan 4 | | 90 | | 90 |
| | Salishan 5 | | 90 | | 90 |
| | Salishan 6 | | 90 | | 90 |
| Total Units | | 4,286 | 672 | 476 | 5,434 |
| Development | THA MTW Support including CFP | 277 | | | 277 |
| | THA as Developer | | | 538 | 538 |
| | Unit Equivalentents | 277 | 0 | 538 | 815 |
| | Total Units/Unit Equivalentents - 15% of Units | 4,563 | 672 | 1,014 | 6,249 |
| Program Support Center Equivalentencies (% of All Units) | | 73.02% | 10.75% | 16.23% | 100% |
| * Note that Wedgewood is managed by a third party, therefore the units are not factored into any of the accounting in THA's cost approach. | | | | | |

APPENDIX C: COMMITMENTS FOR MOVING TO WORK RESERVES

| Planned Expenditure | Committed Funds | Planned Expenditure Date |
|--|------------------------|---------------------------------|
| 2nd Phase of Hillside Terrace redevelopment project | \$ 2,420,000 | 12/31/2015 |
| Renovation/Remodel of 2nd Floor of Administrative Building | \$700,000 | 12/31/2014 |
| Renovation/Remodel of Salishan Family Investment Center | \$300,000 | 12/31/2014 |
| RAD Conversion Costs - Capital Contributions to Projects | \$1,000,000 | 6/30/2015 |
| Software Conversion for Unsupported/Obsolete ERP Software (Visual Homes) | \$600,000 | 6/30/2015 |
| Education Projects - McCarver & Others | \$310,000 | 12/31/2015 |
| Exigent Health & Safety Issues (Meth Remediation) | \$500,000 | 12/31/2014 |
| Total Committed Funds | \$5,830,000 | |

Narrative: The Tacoma Housing Authority will use its MTW reserves in the manner outlined above.

- The dollars allocated to the 2nd phase of Hillside Terrace will fill an anticipated gap in financing that is needed for the redevelopment/replacement of the demolished public housing.
- The funds committed to the renovation of THA’s administrative building and Family Investment Center will allow THA to utilize space more efficiently, reduce storage and supply spaces, and provide needed working and meeting spaces.
- Committed funds for the RAD conversion will go towards anticipated capital needs in properties that cannot attract Low Income Housing Tax Credits or support debt.
- Money committed for software conversion will allow THA to purchase a new ERP housing software program and implement system.
- The dollars allocated towards the Education projects will cover staffing costs for the Education manager and associated caseworkers. One of the grants covering the positions will not be renewed next year and the other two grants may not be renewed.
- Dollars allocated to meth remediation will cover the uninsured costs of remediation of methamphetamine contaminated housing units.

THA will reserve the right to shift resources between these line items as changing funding environments may require.

APPENDIX D: RAD SIGNIFICANT AMENDMENT

Tacoma Housing Authority RAD Significant Amendment to 2015 MTW Plan

The Tacoma Housing Authority is amending its MTW Plan because it was a successful applicant in the Rental Assistance Demonstration (RAD). As a result, the Tacoma Housing Authority will be converting its Public Housing to Project Based Vouchers under the guidelines of PIH Notice 2012-32, REV-1 and any successor Notices. Upon conversion to Project Based Vouchers the Authority will adopt the resident rights, participation, waiting list and grievance procedures listed in Section 1.6 of PIH Notice 2012-32, REV-2; and Joint Housing PIH Notice H-2014-09/PIH-2014-17. These resident rights, participation, waiting list and grievance procedures are appended to this Attachment. Additionally, the Tacoma Housing Authority certifies that it is currently compliant with all fair housing and civil rights requirements.

RAD was designed by HUD to assist in addressing the capital needs of public housing by providing Tacoma Housing Authority with access to private sources of capital to repair and preserve its affordable housing assets. Please be aware that upon conversion, the Authority's Capital Fund Budget will be reduced by the pro rata share of Public Housing Developments converted as part of the Demonstration, and that Tacoma Housing Authority may also borrow funds to address their capital needs. The Tacoma Housing Authority will also be contributing Operating Reserves in the amount of up to \$1,120,000, Capital Funds in the amount of up to \$6,149,180 towards the conversion, and/or Replacement Housing Factor (RHF) Funds in the amount of up to \$2,790,523 towards the conversion. The Tacoma Housing Authority currently has debt under the Capital Fund Financing Program and will be working with Bank of New York to address outstanding debt issues, which may result in additional reductions of capital funds. Regardless of any funding changes that may occur as a result of conversion under RAD, Tacoma Housing Authority certifies that it will maintain its continued service level.

Below, please find specific information related to the Public Housing Development(s) selected for RAD:

Development #1

| | |
|------------------------------|---|
| Development Name | 1202 South M Street |
| Pic Development ID | WA005000001 |
| Conversion Type | PBV |
| Total Units | 77 |
| Pre-RAD Unit Type | Elderly/Disabled |
| Post-RAD Unit Type | Elderly/Disabled |
| Capital Fund allocation | TBD - \$1,038,348 at this time |
| Pre-Conversion Bedroom Type | 77 One-Bedroom Units |
| Post Conversion Bedroom Type | THA anticipates the same distribution post-conversion |
| Transfer of Assistance | None anticipated |
| De Minimis Reduction | None anticipated |
| Unit Reconfiguration | None anticipated |

Development #2

| | |
|------------------------------|---|
| Development Name | 911 North K St |
| Pic Development ID | WA005000001 |
| Conversion Type | PBV |
| Total Units | 43 |
| Pre-RAD Unit Type | Elderly/Disabled |
| Post-RAD Unit Type | Elderly/Disabled |
| Capital Fund allocation | TBD - \$579,857 at this time |
| Pre-Conversion Bedroom Type | 43 One-Bedroom Units |
| Post Conversion Bedroom Type | THA anticipates the same distribution post-conversion |
| Transfer of Assistance | None anticipated |
| De Minimis Reduction | None anticipated |
| Unit Reconfiguration | None anticipated |

Development #3

| | |
|------------------------------|---|
| Development Name | 401 North G St |
| Pic Development ID | WA005000001 |
| Conversion Type | PBV |
| Total Units | 40 |
| Pre-RAD Unit Type | Elderly/Disabled |
| Post-RAD Unit Type | Elderly/Disabled |
| Capital Fund allocation | TBD - \$539,402 at this time |
| Pre-Conversion Bedroom Type | 40 One-Bedroom Units |
| Post Conversion Bedroom Type | THA anticipates the same distribution post-conversion |
| Transfer of Assistance | None anticipated |
| De Minimis Reduction | None anticipated |
| Unit Reconfiguration | None anticipated |

Development #4

| | |
|------------------------------|---|
| Development Name | 2302 6 th Avenue |
| Pic Development ID | WA005000002 |
| Conversion Type | PBV |
| Total Units | 64 |
| Pre-RAD Unit Type | Elderly/Disabled |
| Post-RAD Unit Type | Elderly/Disabled |
| Capital Fund allocation | TBD - \$863,043 at this time |
| Pre-Conversion Bedroom Type | 64 One-Bedroom Units |
| Post Conversion Bedroom Type | THA anticipates the same distribution post-conversion |
| Transfer of Assistance | None anticipated |
| De Minimis Reduction | None anticipated |
| Unit Reconfiguration | None anticipated |

Development #5

| | |
|------------------------------|---|
| Development Name | 3201 S Fawcett Ave |
| Pic Development ID | WA005000002 |
| Conversion Type | PBV |
| Total Units | 30 |
| Pre-RAD Unit Type | Elderly/Disabled |
| Post-RAD Unit Type | Elderly/Disabled |
| Capital Fund allocation | TBD - \$404,551 at this time |
| Pre-Conversion Bedroom Type | 30 One-Bedroom Units |
| Post Conversion Bedroom Type | THA anticipates the same distribution post-conversion |
| Transfer of Assistance | None anticipated |
| De Minimis Reduction | None anticipated |
| Unit Reconfiguration | None anticipated |

Development #6

| | |
|------------------------------|---|
| Development Name | 602 S Wright St |
| Pic Development ID | WA005000002 |
| Conversion Type | PBV |
| Total Units | 58 |
| Pre-RAD Unit Type | Elderly/Disabled |
| Post-RAD Unit Type | Elderly/Disabled |
| Capital Fund allocation | TBD - \$782,133 at this time |
| Pre-Conversion Bedroom Type | 58 One-Bedroom Units |
| Post Conversion Bedroom Type | THA anticipates the same distribution post-conversion |
| Transfer of Assistance | None anticipated |
| De Minimis Reduction | None anticipated |
| Unit Reconfiguration | None anticipated |

Development #7

| | |
|------------------------------|---|
| Development Name | 5425 S Lawrence St |
| Pic Development ID | WA005000003 |
| Conversion Type | PBV |
| Total Units | 41 |
| Pre-RAD Unit Type | Elderly/Disabled |
| Post-RAD Unit Type | Elderly/Disabled |
| Capital Fund allocation | TBD - \$552,887 at this time |
| Pre-Conversion Bedroom Type | 41 One-Bedroom Units |
| Post Conversion Bedroom Type | THA anticipates the same distribution post-conversion |
| Transfer of Assistance | None anticipated |
| De Minimis Reduction | None anticipated |
| Unit Reconfiguration | None anticipated |

Development #8

| | |
|------------------------------|---|
| Development Name | Bergerson Terrace |
| Pic Development ID | WA005000003 |
| Conversion Type | PBV |
| Total Units | 72 |
| Pre-RAD Unit Type | Family |
| Post-RAD Unit Type | Family |
| Capital Fund allocation | TBD - \$970,923 at this time |
| Pre-Conversion Bedroom Type | 56 One-Bedroom Units 16 Two-Bedroom Units |
| Post Conversion Bedroom Type | THA anticipates the same distribution post-conversion |
| Transfer of Assistance | None anticipated |
| De Minimis Reduction | None anticipated |
| Unit Reconfiguration | None anticipated |

Development #9

| | |
|------------------------------|--|
| Development Name | Dixon Village |
| Pic Development ID | WA005000003 |
| Conversion Type | PBV |
| Total Units | 31 |
| Pre-RAD Unit Type | Family |
| Post-RAD Unit Type | Family |
| Capital Fund allocation | TBD - \$418,036 |
| Pre-Conversion Bedroom Type | 23 Three-Bedroom Units 5 Four-Bedroom Units 3 Five-Bedroom Units |
| Post Conversion Bedroom Type | THA anticipates the same distribution post-conversion |
| Transfer of Assistance | None anticipated |
| De Minimis Reduction | None anticipated |
| Unit Reconfiguration | None anticipated |

Development #10

| | |
|------------------------------|---|
| Development Name | Hillside 1 |
| Pic Development ID | WA005000007 |
| Conversion Type | PBV |
| Total Units | 21 |
| Pre-RAD Unit Type | Family |
| Post-RAD Unit Type | Family |
| Capital Fund allocation | TBD - \$0 at this time |
| Pre-Conversion Bedroom Type | 3 One-Bedroom Units 18 Two-Bedroom Units |
| Post Conversion Bedroom Type | THA anticipates the same distribution post-conversion |
| Transfer of Assistance | None anticipated |
| De Minimis Reduction | None anticipated |
| Unit Reconfiguration | None anticipated |

Development #11

| | |
|------------------------------|---|
| Development Name | Hillside II |
| Pic Development ID | WA005000008 |
| Conversion Type | PBV |
| Total Units | 12 |
| Pre-RAD Unit Type | Family |
| Post-RAD Unit Type | Family |
| Capital Fund allocation | TBD - \$0 at this time |
| Pre-Conversion Bedroom Type | 4 One-Bedroom Units 5 Two-Bedroom Units 3 Three Bedroom Units |
| Post Conversion Bedroom Type | THA anticipates the same distribution post-conversion |
| Transfer of Assistance | None anticipated |
| De Minimis Reduction | None anticipated |
| Unit Reconfiguration | None anticipated |

Development #12

| | |
|------------------------------|---|
| Development Name | Hillside Terrace 1500 Block |
| Pic Development ID | WA005000009 |
| Conversion Type | PBV |
| Total Units | 4 |
| Pre-RAD Unit Type | Family |
| Post-RAD Unit Type | Family |
| Capital Fund allocation | TBD - \$0 at this time |
| Pre-Conversion Bedroom Type | 1 One-Bedroom Units 2 Two-Bedroom Units 1 Three Bedroom Units |
| Post Conversion Bedroom Type | THA anticipates the same distribution post-conversion |
| Transfer of Assistance | None anticipated |
| De Minimis Reduction | None anticipated |
| Unit Reconfiguration | None anticipated |

Development #13

| | |
|------------------------------|---|
| Development Name | Salishan One |
| Pic Development ID | WA005000010 |
| Conversion Type | PBV |
| Total Units | 55 |
| Pre-RAD Unit Type | Family |
| Post-RAD Unit Type | Family |
| Capital Fund allocation | TBD - \$0 at this time |
| Pre-Conversion Bedroom Type | 2 One-Bedroom Units 30 Two-Bedroom Units 15 Three Bedroom Units 6 Four Bedroom Units 2 Five Bedroom Units |
| Post Conversion Bedroom Type | THA anticipates the same distribution post-conversion |
| Transfer of Assistance | None anticipated |
| De Minimis Reduction | None anticipated |
| Unit Reconfiguration | None anticipated |

Development #14

| | |
|------------------------------|---|
| Development Name | Salishan Two |
| Pic Development ID | WA005000011 |
| Conversion Type | PBV |
| Total Units | 55 |
| Pre-RAD Unit Type | Family |
| Post-RAD Unit Type | Family |
| Capital Fund allocation | TBD - \$0 at this time |
| Pre-Conversion Bedroom Type | 2 One-Bedroom Units 22 Two-Bedroom Units 29 Three Bedroom Units 2 Four Bedroom Units |
| Post Conversion Bedroom Type | THA anticipates the same distribution post-conversion |
| Transfer of Assistance | None anticipated |
| De Minimis Reduction | None anticipated |
| Unit Reconfiguration | None anticipated |

Development #15

| | |
|------------------------------|---|
| Development Name | Salishan Three |
| Pic Development ID | WA005000012 |
| Conversion Type | PBV |
| Total Units | 45 |
| Pre-RAD Unit Type | Family |
| Post-RAD Unit Type | Family |
| Capital Fund allocation | TBD - \$0 at this time |
| Pre-Conversion Bedroom Type | 3 One-Bedroom Units 28 Two-Bedroom Units 11 Three Bedroom Units 2 Four Bedroom Units 1 Five Bedroom Units |
| Post Conversion Bedroom Type | THA anticipates the same distribution post-conversion |
| Transfer of Assistance | None anticipated |
| De Minimis Reduction | None anticipated |
| Unit Reconfiguration | None anticipated |

Development #16

| | |
|------------------------------|---|
| Development Name | Salishan Four |
| Pic Development ID | WA005000013 |
| Conversion Type | PBV |
| Total Units | 45 |
| Pre-RAD Unit Type | Family |
| Post-RAD Unit Type | Family |
| Capital Fund allocation | TBD - \$0 at this time |
| Pre-Conversion Bedroom Type | 4 One-Bedroom Units 12 Two-Bedroom Units 29 Three Bedroom Units |
| Post Conversion Bedroom Type | THA anticipates the same distribution post-conversion |
| Transfer of Assistance | None anticipated |
| De Minimis Reduction | None anticipated |
| Unit Reconfiguration | None anticipated |

Development #17

| | |
|------------------------------|---|
| Development Name | Salishan Five |
| Pic Development ID | WA005000014 |
| Conversion Type | PBV |
| Total Units | 45 |
| Pre-RAD Unit Type | Family |
| Post-RAD Unit Type | Family |
| Capital Fund allocation | TBD - \$0 at this time |
| Pre-Conversion Bedroom Type | 2 One-Bedroom Units 17 Two-Bedroom Units 22 Three Bedroom Units 3 Four Bedroom Units 1 Five Bedroom Units |
| Post Conversion Bedroom Type | THA anticipates the same distribution post-conversion |
| Transfer of Assistance | None anticipated |
| De Minimis Reduction | None anticipated |
| Unit Reconfiguration | None anticipated |

Development #18

| | |
|------------------------------|---|
| Development Name | Salishan Six |
| Pic Development ID | WA005000015 |
| Conversion Type | PBV |
| Total Units | 45 |
| Pre-RAD Unit Type | Family |
| Post-RAD Unit Type | Family |
| Capital Fund allocation | TBD - \$0 at this time |
| Pre-Conversion Bedroom Type | 3 One-Bedroom Units 26 Two-Bedroom Units 16 Three Bedroom Units |
| Post Conversion Bedroom Type | THA anticipates the same distribution post-conversion |
| Transfer of Assistance | None anticipated |
| De Minimis Reduction | None anticipated |
| Unit Reconfiguration | None anticipated |

Development #19

| | |
|------------------------------|--|
| Development Name | Bay Terrace Phase I |
| Pic Development ID | WA005000016 |
| Conversion Type | PBV |
| Total Units | 26 |
| Pre-RAD Unit Type | Family |
| Post-RAD Unit Type | Family |
| Capital Fund allocation | TBD - \$0 at this time |
| Pre-Conversion Bedroom Type | 4 One-Bedroom Units 8 Two-Bedroom Units 14 Three Bedroom Units |
| Post Conversion Bedroom Type | THA anticipates the same distribution post-conversion |
| Transfer of Assistance | None anticipated |
| De Minimis Reduction | None anticipated |
| Unit Reconfiguration | None anticipated |

Resident Rights, Participation, Waiting List and Grievance Procedures

Additional detail regarding resident rights, participation, waiting list and grievance procedures in connection with the post-conversion Project Based Voucher units is appended to this amendment as Attachment 1.

Significant Amendment Definition

As part of the Rental Assistance Demonstration (RAD), Tacoma Housing Authority is redefining the definition of a substantial deviation from the PHA Plan to exclude the following RAD-specific items:

- a. The decision to convert to either Project Based Rental Assistance or Project Based Voucher Assistance;
- b. Changes to the Capital Fund Budget produced as a result of each approved RAD Conversion, regardless of whether the proposed conversion will include use of additional Capital Funds;
- c. Changes to the construction and rehabilitation plan for each approved RAD conversion; and
- d. Changes to the financing structure for each approved RAD conversion.

Special Provisions Affecting MTW Agencies

Per PIH-2012-32 (HA), REV-2, Section 1.6:

MTW agencies will be able to apply activities impacting the PBV program that are approved in its MTW Plan to these properties as long as they do not conflict with RAD requirements. RAD requirements include statutory requirements or specifically identified special provisions affecting conversions to PBVs, or other conditions and requirements, as detailed in this Notice, including, but not limited to, RAD contract forms or Riders. With respect to any existing PBV regulations that are waived or modified in attachment 1, except where explicitly noted, MTW agencies may modify these or other requirements of the PBV program if the activity is approved in its MTW Plan. All other RAD Requirements listed in attachment 1 shall apply to MTW agencies.

THA has identified the following existing MTW authorizations that will continue to apply to households assisted in the agency's RAD PBV units and we intend to apply these authorizations to the applicable sections of the Attachment 1 of this amendment:

Total Tenant Payment (TTP): Section 1.6.C.4 of PIH Notice 2012-32 states that RAD PHAs must comply with 24 CFR §5.628 which governs the standard TTP calculation. THA received authorization to modify the standard calculation in its 2011 MTW Plan under two activities: 1) Activity 5, Local Policies for Fixed Income Households and 2) Local Policies for Work Able Households. The authorization stated in both activities from the agency's MTW agreement is Attachment C Section D 2 a.

Family Self-Sufficiency (FSS) Program: Section 1.6.C.5 of PIH Notice 2012-32 states that RAD PHAs must comply with 24 CFR Part 984 which governs the standard administration of the FSS program. THA received authorization to modify the standard administration practices in its 2013 MTW Plan under activity 19, Modification to the Family Self-Sufficiency Program. The authorization stated from the agency's MTW agreement is Attachment C Section E.

Earned Income Disregard (EID): Section 1.6.C.8 of PIH Notice 2012-32 states that RAD PHAs must comply with 24 CFR § 5.617 which governs the standard administration of EID. THA received authorization to eliminate EID in its 2011 MTW Plan under Activity 7, Local Income and Asset Policies. The authorization stated from the agency's MTW agreement is Attachment C Section C 11.

Attachment 1 to this Moving to Work annual plan amendment is a separate document and can be found on THA's website at <http://www.tacomahousing.net/content/moving-work-0>.