



COMMONWEALTH OF MASSACHUSETTS

Executive Office of Housing and Livable Communities

Moving to Work Program

Annual Report for Fiscal Year 2023

Submitted to the

U.S. Department of
Housing and Urban Development

Submitted: September 29, 2023

Approved:

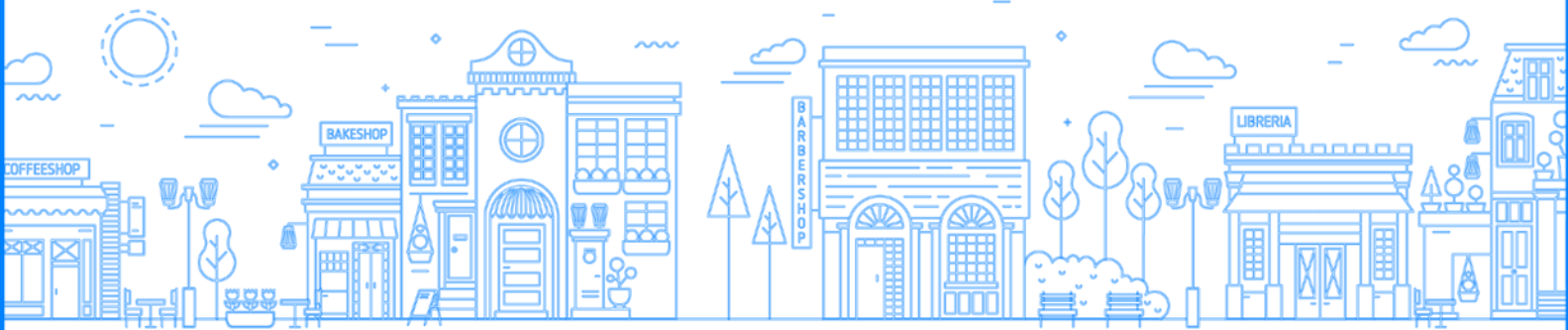


Table of Contents

I.	Introduction	4
A.	Overview of Short-Term Annual Goals and Objectives	4
B.	Overview of Long-Term Goals.....	6
II.	General Operating Information	8
A.	Housing Stock Information	8
B.	Leasing Information	27
A.	Waiting List Information	30
B.	Information on Statutory Objectives and Requirements	31
III.	Proposed MTW Activities.....	34
IV.	Approved MTW Activities	35
A.	Implemented Activities	35
	Activity 2000-1: Family Economic Stability (FES) Program	35
	Activity 2010-2: Payment Standard Exceptions.....	40
	Activity 2010-3: Owner Incentive Fund	42
	Activity 2010-4: Development of Local Forms.....	44
	Activity 2011-2: Supporting Neighborhood Opportunity in Massachusetts	46
	(SNO Mass).....	46
	Activity 2011-4: Multi-Year Recertifications	48
	Activity 2011-5: Youth Transition to Success Program (YTTSP)	50
	Activity 2012-1: MTW Utility Allowances	55
	Activity 2012-4: Expiring Use Preservation Initiative.....	58
	Activity 2012-5: Family Self Sufficiency Program Enhancements.....	59
	Activity 2015-1: Rent Simplification.....	64
	Activity 2018-1: Expanding Housing Opportunities: Relocation Assistance	68
	Activity 2018-2: Residential Assistance for Families in Transition / Emergency Rental & Mortgage Assistance (RAFT/ERMA).....	70
	Activity 2018-3: Support for the Secure Jobs Initiative: Vouchers and Services	72
	Activity 2018-4: Support for the Secure Jobs Initiative: Services Only	75
	Activity 2018-5: A Better Life Program Model.....	78
	Activity 2018-7: Enhanced Local Project-Based Voucher Program	82
	Activity 2018-9: Affordable Housing Preservation and Development Fund.....	84
	Activity 2019-1: Launch.....	88

Activity 2020-1: Moving to College.....	92
Activity 2021-1: Fair Housing Initiative	96
Activity 2021-2: Emergency Waivers	98
Activity 2023-1: Housing Navigator Initiative	101
B. Not Yet Implemented Activities	103
Activity 2011-1: Value Vouchers	103
C. Activities on Hold	104
D. Closed Out Activities	105
V. Application of MTW Funds.....	107
A. Financial Reporting	107
B. Local Asset Management Plan	108
VI. Administrative.....	110
A. Reviews, Audits, and Inspections.....	110
B. Evaluation Results	110
C. MTW Statutory Requirement Certification.....	111
D. MTW Energy Performance Contract (EPC) Flexibility Data.....	111
VII. Appendix A: Listing of Regional Administering Agencies.....	112
VIII. Appendix B: MTW Certification of Statutory Compliance	113

I. Introduction

This Annual Report describes the Moving to Work (MTW) Program activities and accomplishments of the Massachusetts Executive Office of Housing and Livable Communities (EOHLC) (f/k/a the Department of Housing and Community Development) during Fiscal Year 2023, i.e. the period from July 1, 2022 through June 30, 2023.

MTW is a demonstration program authorized by Congress, through which participating agencies are provided flexibility to waive certain statutes and federal regulations in order to design and test approaches for providing housing assistance that address one or more of the following MTW statutory objectives:

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.

EOHLC has been a participant in the MTW Program since 1999. The original small-scale pilot MTW initiative undertaken by EOHLC was expanded in 2008 to incorporate its entire statewide portfolio of tenant-based Housing Choice Vouchers, excluding certain special purpose voucher allocations for which EOHLC may apply MTW flexibilities pursuant to the US Department of Housing and Urban Development's (HUD) published guidance. The programs are administered by EOHLC in partnership with nine Regional Administering Agencies (RAAs), as noted in [Appendix A](#) and referenced throughout this Report.

EOHLC's participation in MTW is subject to the terms and conditions of its 2008 Amended and Restated MTW Agreement with HUD. The required form and content of the Annual Report are defined by HUD in HUD Form 50900 "Elements for the Annual MTW Plan and Annual MTW Report." For purposes of this document and the required submission to HUD, an "MTW activity" is defined as any activity that requires MTW flexibility to waive statutory or regulatory requirements. As required, this Annual Report focuses primarily on describing the outcomes of existing approved and implemented MTW activities.

A. Overview of Short-Term Annual Goals and Objectives

Highlights of FY 2023 MTW activities include:

- EOHLC provided rental assistance and related services to 20,787 MTW voucher households plus an additional 239 MTW households through its local non-traditional housing programs. An additional 1,426 households were served through the Veterans Affairs Supportive Housing (VASH), Mainstream 5, Family Unification Program (FUP) and Emergency Housing Voucher (EHV) programs. While the overall number of households served was less than projected, the number of households served through MTW vouchers increased from FY 2021. Overall, EOHLC exceeded HUD's requirement to serve substantially the same number of households as would have been served without MTW designation. Further, as a direct result of MTW designation, EOHLC was also able to continue to administer a wide array of employment, training, and other supportive service programs and activities designed to meet the unique and diverse needs of our clients statewide.

- **Rent Simplification:** On February 1, 2023, EOHLC implemented a new earned income exclusion for working families. Under this new policy, which was developed in response to inflationary trends and the economic impact of the COVID-19 pandemic, households with earned income are eligible to have up to \$5,000 of their earned income excluded from the rent calculation. The exclusion is applied to qualifying households at their regular recertification. A total of 1,560 households benefitted from the earned income exclusion in FY 2023. Additional households are expected to benefit from this exclusion throughout FY 2024 at the time of households' regular recertification.
- **Utility Allowances:** On February 1, 2023, EOHLC introduced utility allowances (UAs) for cooking and hot water in addition to the existing UAs for heat and other electricity. This policy change was made in response to inflation and additional financial pressures experienced by low-income families. The utility allowances for cooking and hot water heating are applied to any household who pays for heat or other electricity. This policy will remain in place for a period of two years, after which EOHLC will evaluate utility costs and inflationary trends and will determine whether to maintain the UA for cooking and hot water heating or to discontinue it. EOHLC also implemented an updated utility allowance schedule for other electricity to reflect changes in electricity rates.
- **Housing Navigator:** EOHLC executed a three-year, \$1 million per year contract with the nonprofit Housing Navigator in January 2023. Housing Navigator aims to simplify the process of finding and applying for affordable housing by collecting and providing online information on 100% of the affordable rental housing available to the public in Massachusetts. The organization has developed a database and technology that promotes housing equity and that brings transparency to the affordable housing market. The organization successfully piloted its Short Waitlist feature during FY 2023, which highlights units with less than a six-month wait.
- **Fair Housing Initiative:** EOHLC's MTW-funded Fair Housing Initiative entered its second year during FY 2023. The coalition of fair housing agencies leading this initiative (the Fair Housing Alliance of Massachusetts or "FHAM") continued their fair housing investigation and enforcement efforts, serving 53 households through this work. The coalition also conducted numerous fair housing trainings for staff at local housing authorities and at the Regional Administering Agencies, with a total of 116 housing agency staff receiving training thus far. In FY 2023, EOHLC and FHAM worked together to begin designing a media campaign intended to educate voucher recipients, housing providers, and the general public about discriminatory housing practices. The media campaign is expected to launch in FY 2024.
- **Supporting Neighborhood Opportunity in Massachusetts (SNO Mass):** EOHLC's housing mobility program, SNO Mass, continued to make positive progress in FY 2023. An additional 53 families moved to high-opportunity neighborhoods during FY 2023, bringing the total number of opportunity moves to 132 since the start of the program in FY 2020. Another highlight from FY 2023 was the completion of a report by Mobility Works about the experiences of SNO Mass participants and their families after moving to a high-opportunity neighborhood. The report found that most families are highly satisfied with their new community. In particular, families described improvements in their quality of life resulting from safer, quieter streets and supportive, resource-rich schools.

- **Relocation Assistance:** During FY 2023, construction began for the redevelopment of both Chelsea Housing Authority’s Innes Apartments and the first phase of Somerville Housing Authority’s Clarendon Hill development. Relocation of tenants was completed prior to the start of construction, with most tenants relocating to other properties within the housing authority’s portfolio and a smaller number of tenants relocating to privately-owned market-rate units. MTW funds were utilized to assist with moving expenses and will continue to be utilized to cover monthly rent subsidy payments for tenants temporarily residing in privately-owned units.
- **Affordable Housing Preservation and Development Fund:** Approved in FY 2018 to support the development and preservation of affordable housing, the Affordable Housing Preservation and Development Fund expanded in FY 2023 to include the following funding programs: Scattered Site Consolidation, Repositioning State Funded Public Housing, and Recapitalizing Multifamily Developments. EOHLC issued NOFAs for each of these programs in fall of 2022. To date, EOHLC has awarded \$1 million to Barre Housing Authority under Recapitalizing Multifamily Developments and \$2.175 million to Worcester Housing Authority under Repositioning State Funded Public Housing. EOHLC is preparing to issue awards totaling \$18.9 million to four additional housing authorities under Scattered Site Consolidation.
- **Economic Mobility Programming:** FY 2023 and FY 2024 will be transition years for several of EOHLC’s Local Non-Traditional economic mobility activities as we examine outcomes, take lessons learned from these pilots, and apply them to future programming. Both the Launch pilot program and the Secure Jobs: Services Only activity had end dates in FY 2023 with the expectation that other (non-MTW) funding sources would sustain those initiatives going forward. In FY 2024, the Moving to College pilot initiative is expected to end, and a decision will be made about whether to continue A Better Life (ABL) after current contracts end in spring of 2024. While each of these initiatives has provided benefits to the households who participated, they also encountered challenges related to the COVID-19 pandemic, staff capacity, program design, and interagency coordination. As part of its MTW strategic planning efforts over the past year and a half, EOHLC has explored and documented these challenges and developed a clearer vision of the types of MTW initiatives that will be most effective and sustainable going forward.

B. Overview of Long-Term Goals

Through its participation in the MTW program, EOHLC is able to support a variety of programs and policies that promote housing stability and economic security for thousands of participating low-income households, including families with children, seniors, and people with disabilities. The programmatic flexibility afforded by MTW continues to be an important component of the Commonwealth’s overall housing strategy.

In 2022, EOHLC’s Division of Rental Assistance began an MTW strategic planning process, with the goal of developing:

1. A roadmap for effectively and efficiently spending down its MTW reserves in the coming years; and
2. A framework for alignment: (a) among MTW initiatives (current and future), (b) with HUD’s MTW statutory objectives, and (c) with the priorities of key stakeholders.

The strategic planning working group developed an “MTW Rubric” that establishes priorities and key considerations for all current and future MTW initiatives, including mission alignment, anticipated impact, spending, and operational feasibility. Using this rubric as a guide, the working group explored potential new activities and identified a handful of new initiatives and policies for which a significant financial investment from MTW is expected to have a significant impact, in terms of advancing our mission and benefitting a large number of households. Examples of these proposed new initiatives include security deposit assistance for all MTW voucher holders and increased investments in the redevelopment of public housing.

EOHLC will continue to engage in strategic discussions about its MTW program and more specific long-term goals and strategies will be formulated after further analysis and stakeholder engagement. However, at this time, the areas of greatest focus are:

- Expanding housing choice for voucher holders;
- Increasing the preservation and production of affordable housing;
- Providing economic relief and asset-building opportunities to voucher holders; and
- Improving the voucher administration experience for tenants, landlords, and administering staff.

II. General Operating Information

A. Housing Stock Information

Through its Housing Choice Voucher (HCV) Program, EOHLIC provides rental assistance to individuals, families, seniors, and persons with disabilities at properties owned by private or non-profit owners. EOHLIC partners with a wide array of mission-driven, non-profit, and for-profit organizations to provide quality housing opportunities.

i. Actual New Project Based Vouchers

In FY 2023, EOHLIC entered into Agreements and/or Housing Assistance Payments Contracts for 282 new project-based voucher units at 38 different developments under EOHLIC's Project Based Voucher (PBV) program. A list of new PBV projects and summary descriptions is shown in Table 1 below.

Table 1: Actual New Project Based Vouchers

Property Name	Number of Newly Project-Based		Status at End of FY 2023	RAD?	Description of Project
	Planned*	Actual			
108 Centre Street	0	8	Committed	No	Elderly Housing
1201 River Street	0	8	Committed	No	Elderly Housing
153 Green St Parcel A - 4%	0	3	Leased/Issued	No	Family
153 Green St Parcel A - 9%	0	3	Leased/Issued	No	Family
616 3rd Street	0	4	Committed	Yes	RAD Conversion
62 Packard Bldg A	0	8	Committed	No	Family Housing
718-724 Second Street	0	6	Committed	Yes	RAD Conversion
950 Falmouth Road/LeClair Village	0	8	Committed	No	Family Housing
Aileron	0	8	Committed	No	Family Housing
Amythyst Brook Apartments	0	8	Committed	No	Family Housing
Anchor Point Phase 2	0	8	Committed	No	Family Housing
Cape View Way	0	6	Committed	No	Family Housing
Cloverleaf	0	8	Committed	No	Family Housing
Elizabeth Brook Apartments	0	8	Committed	No	Elderly Housing
Elm Place 4%	0	4	Committed	No	Family Housing
Elm Place 9%	0	8	Committed	No	Family Housing
Fitchburg Arts Academy/ 62 Academy Street	0	8	Committed	No	Family Housing
Island Parkside Phase 2	0	8	Leased/Issued	No	Family Housing
John J Meany Senior	0	8	Committed	No	Elderly Housing
Knox Residence II	0	8	Committed	No	New Construction – Family Housing
Leland House	0	8	Committed	No	Elderly Housing

Property Name	Number of Newly Project-Based		Status at End of FY 2023	RAD?	Description of Project
	Planned*	Actual			
Library Commons 2	0	8	Committed	No	Family Housing
Lincoln School	0	8	Committed	No	Elderly Housing
Littleton Drive Family	0	8	Committed	No	Family Housing
Maple Woods	0	8	Committed	No	Elderly/Disabled units
Maribay Apartments	0	16	Leased/Issued	Yes	Family Housing
McManus Manor	0	8	Committed	No	Elderly Housing
Mildred Hailey Building 1A	0	4	Committed	No	Family Housing
Orleans Cape Cod Five	0	8	Committed	No	Family Housing
Prospect Estates	0	8	Committed	No	Family Housing
Salem Schools	0	8	Committed	No	Elderly Housing
Scranton Main	0	8	Committed	No	Elderly Housing
The Point at Hills Farm - 9%	0	8	Committed	No	Family Housing
Union Block	0	4	Committed	No	Family Housing
Wamsutta Apartments Historic Millwork Housing	0	8	Committed	No	Elderly Housing
Westminster Senior Residence	0	8	Committed	No	Elderly Housing
White Terrace	0	8	Committed	No	Family Housing
YWCA Residences at Ingalls Court	0	8	Committed	No	Elderly Housing
Total Newly Project-Based:	0	282			

Differences between the Planned and Actual Number of Vouchers Newly Project-Based:

The 50900 requires reporting of planned and actual PBVs which will be either under AHAP or HAP during the Annual Plan fiscal year. EOHLC's PBVs are allocated through the state's competitive rental round and in concert with the award of Low Income Housing Tax Credits. Proposals are due in February of each year with funding announcements made in the spring. Given that EOHLC's MTW Plan is due to HUD prior to the award of FY 2023 PBV funding, EOHLC does not identify planned projects to be awarded PBVs. Further, of the awards made, EOHLC cannot determine which proposals will pass all screening thresholds and enter into AHAP or HAP contracts. Accordingly, EOHLC did not include planned new PBVs in the FY 2023 Plan; however, the table above includes the new PBVs which were under AHAP or HAP by the end of FY 2023.

ii. Actual Existing Project Based Vouchers

Table 2 provides a list of existing PBV projects and summary descriptions, including information on actual unit counts at the end of the Plan Year. In addition to the 282 new PBV units added to EOHLC's PBV program in FY 2023, EOHLC also provided subsidies and oversight for 4,568 existing PBV units.

Table 2: Actual Existing Project Based Vouchers

Property Name	Number of Existing Project-Based		Status at End of FY 2023	RAD?	Description of Project
	Planned*	Actual			
1005 Broadway	8	8	Issued	No	New construction Family
1060 Belmont Street	7	7	Leased	No	Family and Elderly/Disabled units
108 Newbury Street	4	4	Leased	No	Family - New construction of four-story building
109 Gilman Street	1	1	Leased	No	Family unit
1129 Dorchester Avenue	8	8	Leased	No	Family and Elderly/Disabled units
1202 Commonwealth Avenue	6	6	Leased	No	Units for homeless individuals
126 Chandler Street	8	7	Leased	No	Family - new construction 2 & 3-BR
1285-1291 Mass Avenue	4	4	Leased	No	Family units
132 Chestnut Hill Ave.	8	8	Leased	No	New construction/ Elderly
140 East Street	2	2	Leased	No	Elderly/Disabled units
14-24 Roach Street	8	8	Leased	No	Family units
154-168 Eagle Street	8	8	Leased	No	Family units; supportive services
1599 Columbus	8	8	Committed	No	New Construction – Family housing
165 Winter Street	3	3	Leased	No	Family - Substantial rehab of historic former school
1-7 Piedmont Street	3	3	Leased	No	Elderly/Disabled units
1740 Washington Street	8	8	Leased	No	Units for homeless individuals
181 Chestnut	8	8	Leased	No	Rehab – Family
181 Washington Street	8	8	Leased	No	Family - New construction of four-story, mixed-use building
19 Hancock Street	3	3	Leased	No	Units for homeless individuals
191-195 Bowdoin	8	8	Leased	No	New construction/family
2 Hardy Street	6	6	Leased	No	Family-new construction 2 & 3-BR
2147 Washington Street	8	8	Committed	No	New Construction – Family housing
25 Amory Street - Jackson Square	8	8	Leased	No	Family - new construction 1, 2, 3-BR
25 Sixth Street	8	8	Committed	No	New Construction – Family housing
250 Centre Street	8	8	Committed	No	New Construction – Family housing

Property Name	Number of Existing Project-Based		Status at End of FY 2023	RAD?	Description of Project
	Planned*	Actual			
250 Gull Pond Road, Wellfleet	2	2	Leased	No	Family - New construction of three two-unit townhouses
28 Mount Pleasant Street	2	2	Leased	No	Units for homeless individuals
288 Harrison Residences	8	8	Committed	No	New Construction – Family housing
32 Kent Street	8	8	Leased	No	Family and Elderly/Disabled units
32 Old Ann Page Way	2	2	Leased	No	Family and Elderly/Disabled units
370 Essex Street	8	8	Committed	No	New construction/family
370 Harvard Street	8	8	Leased	No	New Construction/elderly
40A Nelson Avenue	3	3	Leased	No	Family units
430-436 Dudley Street	3	3	Leased	No	Units for homeless individuals
447 Concord Road	4	4	Leased	No	Family units
4-6 Ashland Street	3	3	Leased	No	Units for homeless individuals
46-48 School Street	2	2	Leased	No	Family units
470 Main Street	7	7	Leased	No	Family and Elderly/Disabled units
48 Water Street	6	6	Leased	No	Units for homeless individuals
48-64 Middlesex Street	6	6	Leased	No	Family units
5 Benefit Street	4	4	Leased	No	Family units
525 Beach Street	7	7	Leased	No	Family and Disabled - Three units reserved for disabled - new construction of four-story building
555 Merrimack	8	8	Committed	No	New Construction – Family and Disabled
57 Main Street	4	4	Leased	No	Family - PHA-owned rehab of three-story, mixed-use building
571 Revere Street	8	8	Leased	No	Family-new construction 2 & 3-BR
58 Harry Kemp Way	4	4	Leased	No	Family units
580 South Summer Street	12	12	Leased	No	Family - Rehab with 1, 2, and 3 BR units
6 Fort Street	8	8	Leased	No	Family and Elderly/Disabled units
66 Hudson at One Greenway	8	8	Leased	No	Disabled - PBV units reserved for disabled; new construction of 10-story high-rise

Property Name	Number of Existing Project-Based		Status at End of FY 2023	RAD?	Description of Project
	Planned*	Actual			
75 Amory Avenue	8	8	Leased	No	Family - New construction rental PBVs at 30% AMI
75 Cross Street	8	8	Leased	No	Supportive services
82 Green Street	10	10	Leased	No	Units for homeless individuals
86 Dummer Street	2	2	Leased	No	Family - New construction of rental in a three-story building
885C State Highway	1	1	Leased	No	Family - New construction - 40B project
9 Leyland Street	8	8	Committed	No	New Construction – Elderly housing
9 May Street	8	8	Leased	No	Family and Elderly/Disabled units
910 Main Street/Windrush	8	8	Committed	No	New Construction – Elderly housing
98 Essex	7	7	Leased	No	New construction/family
Acre High School Apartments	8	8	Leased	No	Family and Elderly/Disabled units
Acushnet Commons	3	3	Leased	No	Family units
Ames Privilege 2	4	4	Leased	No	Family - Substantial rehab of historic mill complex
Ames Shovel Works/Main and Oliver Streets	8	8	Leased	No	Family - Substantial rehab of historic factory complex
Amory Street/10 and 20 Amory Avenue	10	10	Leased	No	Family units
Anchor Point I	8	8	Leased	No	New Construction – Family housing
Appleton Mill Apartments	8	8	Committed	No	New Construction – Elderly housing
Arlington - Scattered Sites	4	4	Leased	No	Family units; 29 Bow Street, 288B Summer Street, 77 Webster Street, 222 Broadway
Armory Street Apartments	1	1	Leased	No	Disabled - PBV unit reserved for disabled; new construction of four-unit building
Austin Corridor II	5	5	Leased	No	Family - Substantial rehab of six separate buildings
Baker Street	20	20	Leased	No	Family units
Barnstable Family/Kimber Woods	7	7	Leased	No	Family units
Barnstable Senior/Lombard Farm	8	8	Leased	No	Elderly/Disabled units
Bartlett Station (Building A)	8	8	Leased	No	New construction/family

Property Name	Number of Existing Project-Based		Status at End of FY 2023	RAD?	Description of Project
	Planned*	Actual			
Baystate Place Apartments	8	8	Committed	No	New Construction – Family housing
Bellingham Hill Family Homes	7	7	Leased	No	Supportive - Individual Service Plans (ISP) tailored to tenant needs. Services vary and can include: GED, parenting classes, employment training, financial management, referrals to other provider agencies
Benfield Farms/South Street	5	5	Leased	No	Elderly - New construction facility for the elderly
Bentley Apartments	8	8	Leased	No	Family-new construction 2 & 3-BR
Berkshire Peak (formerly Riverview Homes)	8	8	Leased	No	Disabled - Units reserved for disabled; new construction
Bethany Hill School	10	10	Leased	No	Family units
Blanchard School	6	6	Leased	No	Adaptive reuse family units
Bliss School	8	8	Leased	No	Family units
Borinquen Apartments (formerly Villa Borinquen)	8	8	Leased	No	Family and Elderly/Disabled units
Boston YWCA	20	20	Leased	No	Units for homeless individuals
Bostwick Gardens	8	8	Leased	No	New construction and Rehab, elderly, at 50% AMI
Bowers Brook	4	4	Leased	No	Elderly/Disabled units
Breezy Acres Expansion/Great Cove Community	8	8	Leased	No	Family - New construction of five duplex buildings
Brewster Woods	7	7	Committed	No	New Construction – Family housing
Bridgeview Center	8	8	Leased	No	Family and Disabled - New construction of mixed-use, multi-story building
Briscoe Village	8	8	Committed	No	New Construction – Senior Housing
Broadway Building	4	4	leased	No	New Construction – Family housing
Brockton South TOD	8	8	Committed	No	New Construction – Family housing
Brook Ave.	4	4	Leased	No	Rehab/family units
Burbank Gardens	8	8	Leased	No	Rehab/family units
Burbank Terrace	7	7	Committed	No	New Construction – Family housing
Cabot Housing	8	8	Leased	No	New Construction SRO

Property Name	Number of Existing Project-Based		Status at End of FY 2023	RAD?	Description of Project
	Planned*	Actual			
Cabot Street Homes	8	8	Leased	No	Elderly/Disabled units
Canal Bluffs I	3	3	Leased	No	Family units
Canal Bluffs III (Highmeadows)	7	7	Leased	No	Family- new construction 2 + 3-bedroom units
Capen Court	8	8	Leased	No	Elderly/Disabled units
Capital Square Apartments	8	8	Leased	No	Family units
Carpenters Glen	8	8	Leased	No	Family - Rehab of existing townhouse-style development
Carter School	8	8	Leased	No	Substantial Rehab--Adaptive Reuse, Family units at 50% AMI
Casa Familias Unidas	8	8	Leased	No	Supportive services
Central Building	8	8	Leased	No	Substantial Rehabilitation of an historic building creating mixed-income rental units; 50 affordable, 5 market rate
Chapin School Veterans Housing	43	43	Leased	No	Adaptive reuse of former school for Veterans
Chestnut Crossing	8	8	Leased	No	Mod Rehab, 0-BR units at 50%
Chestnut Park Apartments	8	8	Leased	No	Family - Adaptive reuse of former church and school; 85, 95, 57-60 Chestnut Street, 218 Hampden Street
Chestnut Square Redevelopment	8	8	Leased	No	Existing housing rehab/family
Clay Pond Cove	8	8	Leased	No	Family units
Cliftex Phase II	8	8	Committed	No	Adaptive reuse of a mill
Cole Ave.	8	8	Leased	No	Family - new construction 2 & 3-BR
Colonel Lovell's Gate Apartments	44	44	Leased	No	Family - Preservation
Commonwealth Apartments	88	88	Leased	No	Expiring Use Project - Family - 88 out of 106 EVs converted to PBVs
Conant Village	15	15	Leased	No	Family units
Congress Street Residences	8	8	Leased	No	Family - New construction; Dow, Palmer, Congress, Perkins, Ward Streets
Conifer Hill Commons II	8	8	Leased	No	Family - Six units have disabled preference; new construction of three-story townhouse
Conifer Hill Commons Phase I	8	8	Leased	No	Family - Six units have disabled preference; new

Property Name	Number of Existing Project-Based		Status at End of FY 2023	RAD?	Description of Project
	Planned*	Actual			
					construction of three-story townhouse
Coolidge at Sudbury	8	8	Leased	No	Age-Restricted (55+ older) - New construction of four-story building
Coolidge at Sudbury Phase II	8	8	Leased	No	New construction/Family
Coppersmith Village Apartments, Boston	8	8	Leased	No	New Construction/Family
Cordovan at Haverhill Station	8	8	Leased	No	Family units
Cottage Square	8	8	Leased	No	Family - Adaptive reuse of former mill (four stories)
Counting House Lofts	6	6	Leased	No	Family - Adaptive reuse of historic mill (six stories)
Cumber Homes Apartments/Cumberland and Dwight	8	8	Leased	No	Family units
Cutler Heights	7	7	Leased	No	Family and Elderly/Disabled units
Dalton Apartments	8	8	Leased	No	Family - Substantial rehab of existing multifamily housing; 11 separate buildings
Depot Crossing	8	8	Leased	No	Family units
Depot Village I	5	5	Leased	No	Family - new construction 2 & 3-BR
Doe House	5	5	Leased	No	Units for homeless individuals
Downing Square Broadway Initiative	3	3	Leased	No	Family-new construction 3-BR
Duck Mill/Union Crossing Phase II	8	8	Leased	No	Family - Adaptive reuse of historic mill; PBVs serve 30% AMI families
Eagle Mill Phase I	8	8	Committed	No	New Construction – Family housing
Earle Street	15	15	Leased	No	Family units; supportive services
East Howard Street/Veterans Housing	8	8	Leased	No	Supportive Housing - Veterans preference; new construction, one building
Edmands House	59	59	Leased	No	Expiring Use Project - Family - 59 out of 68 EVs converted to PBVs
Elias Brookings Apartments	8	8	Leased	No	New Construction – Family housing

Property Name	Number of Existing Project-Based		Status at End of FY 2023	RAD?	Description of Project
	Planned*	Actual			
Firehouse Place	4	4	Leased	No	Family and Elderly/Disabled units
First Lowell	30	30	Leased	No	Expiring Use Project - Family - 30 out of 37 EVs converted to PBVs
Fitchburg Place	8	8	Leased	No	Elderly/Disabled units
Fitchburg Yarn Mill	8	8	Leased	No	Family units
Forest Springs	5	5	Leased	No	Family - New construction
Founders Court/979 Falmouth Rd	2	2	Leased	No	Family units
Four Corners Plaza	8	8	Committed	no	New construction – Family housing
Freedom Village	6	6	Leased	No	Family and Elderly/Disabled units
Gateway Residences on Washington	8	8	Leased	No	Family - New construction mixed-use building
General Heath Square Apartments	8	8	Leased	No	New construction, family units
Gerson Building, Haverhill	8	8	Leased	No	New construction, family housing, 70% veteran's preference at 50% AMI
Glen Brook Way I	8	8	Leased	No	New construction/family
Glen Brook Way Phase 2	8	8	Committed	No	New Construction – Family housing
Golda Meir House Expansion	20	20	Committed	No	New Construction/elderly
Goshen Senior Housing, Goshen	6	6	Leased	No	Elderly - New construction
Grand Street Commons	8	8	Leased	No	New Construction – Family housing
Grandfamilies House	8	8	Leased	No	Supportive services
Granite Street Crossing	8	8	Committed	No	New Construction – Family housing
Granite Street Housing	5	5	Leased	No	Supportive services
Greater Four Corners Stabilization - Pilot, Boston	2	2	Leased	No	Family - Scattered site rehab of four buildings
Hadley Building	8	8	Leased	No	Family - Historic rehab of former furniture store
Harbor and Lafayette Homes	4	4	Leased	No	Moderate Rehabilitation with existing tenants
Harbor Cove/63 Washington Avenue	24	24	Leased	No	Supportive services
Harbor Village	8	8	Leased	No	Family-new construction 2 & 3-BR
Hayes	4	4	Leased	No	Elderly/Disabled Units
Haywood House	8	8	Committed	No	New Construction/elderly

Property Name	Number of Existing Project-Based		Status at End of FY 2023	RAD?	Description of Project
	Planned*	Actual			
Hearth at Four Corners	8	8	Leased	No	Elderly - new construction
Hearth at Olmstead Green	15	15	Leased	No	Elderly/Disabled units
Herring Brook Hill (River Street)	4	4	Leased	No	New construction
High Rock Homes	8	8	Leased	No	Family units
Highland Terrace	8	8	Leased	No	Family and Elderly/Disabled units
Highland Village	110	110	Leased	Yes	RAD (Rent Supp) - Existing Family Housing - two-story, townhouse-style buildings
Hillcrest Acres	8	8	Committed	No	New Construction – Family housing
Hillside Avenue	5	5	Leased	No	Family and Elderly/Disabled units
Hillside Village	16	16	Leased	No	Family units
Holbrook Center Senior Housing	8	8	Committed	No	New Construction – Elderly housing
Holcroft Park Apartments	8	8	Leased	No	Family and Elderly/Disabled units; 30 Mill Street; 10, 22, 30 Grant Street
Holcroft Park Homes Phase II	8	8	Leased	No	Family and Elderly/Disabled units
Holtzer Park	8	8	Leased	No	Family - new construction 1, 2, 3-BR
Holyoke Farms Apartments	8	8	Leased	No	Rehab/family units
Home Together	4	4	Leased	No	Family - New construction of two duplex buildings
Hope in Action	49	49	Leased	Yes	RAD (Rent Supp) - Existing Family Housing - seven scattered sites/two towns
Indigo Block	8	8	Leased	No	Family-new construction 2 & 3-BR
Ingraham Place	8	8	Leased	No	Supportive services
Island Creek North	8	8	Leased	No	Age-Restricted (55+ older) - New construction; one four-story building
Island Creek North/Age Unrestricted	8	8	Leased	No	New construction - One four-story building; fitness center/community room
Island Parkside Phase 1	0	8	Committed	No	New Construction – Family housing
Ivory Keys Apartments	8	8	Leased	No	Family - Substantial rehab of historic former piano factory

Property Name	Number of Existing Project-Based		Status at End of FY 2023	RAD?	Description of Project
	Planned*	Actual			
Jackson Commons	8	8	Leased	No	Family - New construction of four-story building
Janus Highlands	8	8	Leased	No	Family units
Jewel Crossing, North Attleboro	8	8	Leased	No	Family - New construction; mixed income
Julia Bancroft	8	8	Committed	No	New Construction – Elderly housing
Kaszanek House, Malden	8	8	Leased	No	Rehab of 11-unit SRO facility with a homeless preference
Kendrigan Place	8	8	Leased	No	Family - Rehab of existing six-story building
Kennedy Building Apartments, Hanover	4	4	Leased	No	Family - Adaptive reuse of old school building
Kensington Court @ Lakeville Station	8	8	Leased	No	Family units
KGH Phase 4	5	5	Leased	No	Family and Elderly/Disabled units
King Street	5	5	Leased	No	Supportive services
Kings Landing	78	78	Leased	No	Expiring Use Project - Family - 78 out of 108 EVs converted to PBVs
King's Lynne Apartments	176	176	Leased	No	Existing family housing
Knitting Mills	8	8	Leased	No	New construction
Knox Residence I	8	8	Committed	No	New Construction – Family housing
Lafayette Housing	8	8	Leased	No	Family units; 10 Congress Street, 3-13 Prince Street Place
Lawson Green Apartments	8	8	Leased	No	Elderly - new construction
Lenox Schoolhouse, Lenox	4	4	Leased	No	Age Restricted (55+ older) - Existing project changing from Assisted Living to 55 and older
Library Commons	5	5	Leased	No	Rehab/family units
Lighthouses	8	8	Committed	No	New Construction – Family housing
Lincoln Hotel	63	63	Leased	No	Family units
Little Pond Place	4	4	Leased	No	New Construction/family
Littleton Drive Senior	8	8	Committed	No	New Construction – Elderly housing
Loft @ 30 Pines (formerly Heywood Wakefield 4)	8	8	Leased	No	Family - Substantial rehab of historic former mill
Loring Towers	8	8	Leased	No	Family units
Loring Towers 2	138	138	Leased	No	Expiring Use – Family housing

Property Name	Number of Existing Project-Based		Status at End of FY 2023	RAD?	Description of Project
	Planned*	Actual			
Lower Winter Street	8	8	Committed	No	New Construction – Homeless
Ludlow Mill, Ludlow	8	8	Leased	No	Age Restricted (55+ older) - Adaptive reuse of historic mill building
Lunenburg Senior Living	8	8	Leased	No	New construction/family
Lydia Square Apartments Phase 1	8	8	Leased	No	Elderly - new construction
Malden Mills Phase II	7	7	Leased	No	Family - Adaptive reuse of historic mill building into 62 units
Marion Village Estates/Front Street/Route 105	8	8	Leased	No	Family - New construction of two buildings/two stories
Marshall Place Apartments	8	8	Leased	No	Elderly/Disabled units
Mary Stone	8	8	Leased	No	Elderly - new construction
Mashpee Village Phase II	8	8	Leased	No	Family - Rehab of existing affordable housing; 51 garden-style buildings
Mashpee Wampanoag Housing	8	8	Leased	No	New construction, family housing, 30% AMI
Mason Square Apartments II	8	8	Leased	No	Family-new construction 2 & 3-BR
Mattapan Station 4%	6	6	Leased	No	Family - new construction 2 & 3-BR
Mattapan Station 9%	2	2	Leased	No	Family - new construction 2-BR
Mayhew Court	12	12	Leased	No	Family units
McCarthy Village/Whittlesey Village	12	12	Leased	No	Family - New construction of six duplexes on surplus housing authority land
McElwain School Apartments	8	8	Committed	No	New Construction – Family housing
Mechanic Mill	8	8	Leased	No	Substantial Rehab-Adaptive Reuse, Family units at 30%
Melpet/Route 134 Community Housing	7	7	Leased	No	Family - New construction of eight farmhouse-style buildings
Merrimack Place	8	8	Committed	No	New Construction – Elderly housing
Middlebury Arms	49	49	Leased	No	Expiring Use Project - Family - 49 out of 62 EVs converted to PBVs
Mildred Hailey Building 1B	4	4	Committed	No	New Construction - Family housing

Property Name	Number of Existing Project-Based		Status at End of FY 2023	RAD?	Description of Project
	Planned*	Actual			
Mill 8 Apartments	8	8	Committed	No	New Construction – Elderly housing
Montello Welcome Home	8	8	Leased	No	Supportive Housing - Homeless preference; new construction of 20-unit building (+1-2units)
Montello Welcome Home II	8	8	Leased	No	New construction. Supportive housing services- homeless preference.
Moran Square Redevelopment	8	8	Leased	No	New construction/family
Morgan Woods/Pennywise Path	6	6	Leased	No	Family units
Moseley Apartments	6	6	Leased	No	Substantial Rehab--Adaptive Reuse, Family units at 30% AMI
Noquochoke Village	8	8	Leased	No	Family- New construction
North Bellingham Veterans Home	8	8	Leased	No	Supportive Housing - Veterans preference; substantial rehab of legion post
North Square at the Mill District	8	8	Leased	No	New construction, family units at 30% AMI
North Village	134	134	Leased	Yes	RAD (Rent Supp) - Existing Family Housing; 12 townhouse-style buildings
Northampton Lumber Yard Apts.	8	8	Leased	No	New Construction/family
Ocean Shores	8	8	Leased	No	Elderly/Disabled units
Old High School Commons	6	6	Leased	No	Family and Elderly/Disabled units
Olmsted Green 100	8	8	Leased	No	New construction, family housing at 50% AMI
Olmsted Green Affordable Rental IV	8	8	Leased	No	Family-new construction 1, 2, 3-BR
Olympia Oaks	8	8	Leased	No	Family - New construction; 11 buildings
One Beach	8	8	Leased	No	Age-Restricted (55+ older) - New construction; four stories/elevator
Oscar Romero	8	8	Leased	No	Family and Elderly/Disabled units
Outing Park I	94	94	Leased	Yes	RAD (Mod Rehab) - Families - Existing multi buildings
Outing Park II	81	81	Leased	Yes	RAD (Mod Rehab) - Families - Existing multi buildings

Property Name	Number of Existing Project-Based		Status at End of FY 2023	RAD?	Description of Project
	Planned*	Actual			
Oxford Ping on 3-4 Ping Street	4	4	Leased	No	Disabled - New construction of 10-story (w/elevator) building: PBV units reserved for disabled
PAC 10 Lofts Phase II	8	8	Committed	No	New construction/family/disabled
Paige Apartments	8	8	Leased	No	Supportive - Individual Service Plans (ISP) tailored to tenant needs. Services vary and can include GED, parenting classes, employment training, financial management, referrals to other provider agencies
Palmer Cove	6	6	Leased	No	Family and Elderly/Disabled units, supportive services
Paradise Pond Apartments	8	8	Leased	No	Family units
Parcel 25 Phase 1A, Boston	8	8	Leased	No	Family - New construction; five-story, mixed-use building
Parcel 25 Phase II	8	8	Leased	No	New Construction/family
Parcel 8 & 9	8	8	Leased	No	New Construction – Family housing
Pelham House	3	3	Leased	No	Elderly/Disabled units
Pilot Grove Apartments II	7	7	Leased	No	Family - New construction of five townhouse buildings
Pine Woods	5	5	Leased	No	Family and Elderly/Disabled units
Plaza Apartments	8	8	Committed	No	New Construction – Family housing
Powderhouse Village	8	8	Leased	No	Elderly/Disabled units
Prichard Academy	2	2	Leased	No	Family - Rehab of two four-story buildings
Prospect Hill	4	4	Leased	No	Family units
Puerta de la Esperanza	27	27	Leased	No	Family - Rehab with 1, 2, and 3 BR units
Putnam Green	8	8	Leased	No	Family units
Reed House Annex	8	8	Leased	No	Supportive services
Renwood-PWA Ltd. Part./158 Walnut Avenue	8	8	Leased	No	Supportive services
Renwood-PWA Ltd. Part./36 Edgewood Street	3	3	Leased	No	Supportive services
Renwood-PWA Ltd. Part./526 Mass. Avenue	7	7	Leased	No	Supportive services

Property Name	Number of Existing Project-Based		Status at End of FY 2023	RAD?	Description of Project
	Planned*	Actual			
Residences at Brighton Marine	8	8	Leased	No	New construction, family units 100% preference for veterans
Residences at Fairmount Station	6	6	Leased	No	New Construction/family
Residences at Stonybrook	4	4	Leased	No	Family units
Residences at Stonybrook Phase II	8	8	Leased	No	Family - New construction of seven townhouse-style buildings
Residences at Yarmouth Gardens	8	8	Leased	No	New Construction – Family housing
Residences off Baker	8	8	Committed	No	New Construction – Family housing
Reviviendo	3	3	Leased	No	Units for homeless individuals; 105 Newbury Street, 105 Haverhill Street, 60 - 62 Newbury Street, 10 Jackson Terrace
Rice Silk Mill	5	5	Leased	No	Family units
Robert Hill Way Senior Apartments	8	8	Leased	No	Elderly - new construction
Rosewood Way Townhouses	8	8	Committed	No	New Construction – Family housing
RTH Riverway	8	8	Leased	No	Disabled - Units reserved for disabled; new construction of 10-story building
Ruggles Assisted Living	35	35	Leased	No	Supportive services
Russell Terrace	2	2	Leased	No	Units for homeless individuals
Sacred Heart	8	8	Leased	No	Elderly/Disabled units; 23 Hawley Street, 30 Groton Street, 32 Groton Street
Salem Harbor	4	4	Leased	No	Family units
Salem Heights	72	72	Leased	No	Family units
Salem Point LP/Harbor, Ward, Peabody Streets	7	7	Leased	No	Family units; 43, 57-59, 64 Harbor; 43 Ward; and 38 Peabody Street
Sally's Way	4	4	Leased	No	Family - New construction of six buildings on town-owned land (99-year lease)
Sanford Apartments	5	5	Leased	No	Family units
Saunders School Apartments	16	16	Leased	No	Supportive services
Senior Residences at Machon	8	8	Leased	No	55+ new construction

Property Name	Number of Existing Project-Based		Status at End of FY 2023	RAD?	Description of Project
	Planned*	Actual			
Shoe Shop Place	5	5	Leased	No	Family - Adaptive reuse of an old mill creating rental housing
Simon C. Fireman Expansion	8	8	Committed	No	New Construction – Elderly housing
Sirk Building	8	8	Leased	No	Family units
Sitkowski School	8	8	Leased	No	Elderly - Substantial rehab of former school
Southbridge Mills	5	5	Committed	No	New Construction – Family housing
Southgate Place	6	6	Leased	No	Family and Elderly/Disabled units
Spencer Green	8	8	Leased	No	Family and Elderly/Disabled units
Spencer Row	8	8	Leased	No	Family and Elderly/Disabled units
Spring Gate	181	181	Leased	Yes	RAD (Rent Supp) - Existing Family Housing - two-story, townhouse-style buildings
Spring Hill	37	37	Leased	Yes	RAD (Rent Supp) - Existing Family Housing - two-story, townhouse-style buildings
Spring Meadow	52	52	Leased	No	Expiring Use Project - Family - 52 out of 98 EVs converted to PBVs
Squantum Gardens II	0	5	Leased	No	Elderly housing
Squantum Gardens/The Moorings	39	39	Leased	No	Elderly/Disabled units
Squirrelwood	2	2	Leased	No	Rehab & New Construction – Family housing
St. Joseph’s Apartments	4	4	Leased	No	Family units
St. Joseph’s Redevelopment	8	8	Leased	No	Family (3 units) and Disabled (5 units) - New construction of four-story, mixed-use building
St. Polycarp I	8	8	Leased	No	Family and Elderly/Disabled units
St. Polycarp-Phase II	8	8	Leased	No	Family units
St. Polycarp-Phase III	8	8	Leased	No	Family and Disabled - Three units reserved for disabled - new construction of three-story building
St. Theresa Condo I	8	8	Leased	No	New construction/elderly
St. Theresa Condo II	8	8	Leased	No	New construction elderly

Property Name	Number of Existing Project-Based		Status at End of FY 2023	RAD?	Description of Project
	Planned*	Actual			
Stable Path Residences	5	5	Leased	No	Family - New construction of 10 buildings (2- and 3-bedroom townhouses)
Stage Coach Residences	6	6	Leased	No	Family (4 units) and Disabled (2 units) - New construction/surplus PHA land
Steven's Corner	8	8	Leased	No	Family and Elderly/Disabled units
Stone Mill	8	8	Committed	No	New Construction – Family housing
Sudbury	11	11	Leased	No	Family units; 41 Great Road, 56 Great Road, 11 Ford, 19 Greenwood, 10 Landham
Summerhill Glen	89	89	Leased	No	Expiring Use Project - Family - 89 out of 120 EVs converted to PBVs
Sycamore on Main	8	8	Leased	No	New Construction – Family housing
Tapley Court	8	8	Leased	No	Family and Elderly/Disabled units
Tavernier Place	7	7	Committed	No	New Construction – Elderly housing
Tenney Place Phase I	8	8	Leased	No	Family - New construction of two buildings
Tenney Place Phase II	8	8	Leased	No	New Construction/family
Terrapin Ridge	8	8	Leased	No	New Construction/family
Thankful Chase	5	5	Leased	No	Family and Elderly/Disabled units
The Coolidge	4	4	Leased	No	Elderly/Disabled units
The Flats at 22	5	5	Leased	No	Family and Disabled - Four units reserved for disabled; new construction/townhouse style
The Kendall	8	8	Leased	No	Existing SRO; six units at 50% AMI and two units at 30% AMI
The Pryde	8	8	Committed	No	New Construction – Elderly housing
The Residences at Salisbury Square	8	8	Leased	No	Family - New construction of affordable rental housing
Ticoma Green Workforce Housing	8	8	Committed	No	New Construction – Family housing
TILL Building	5	5	Leased	No	Family units

Property Name	Number of Existing Project-Based		Status at End of FY 2023	RAD?	Description of Project
	Planned*	Actual			
Tri-Town Landing I	8	8	Leased	No	Family units
Tri-Town Landing II	8	8	Leased	No	Family - New construction of three-story building; former drive-in
Tri-Town Landing III	8	8	Leased	No	Family - New construction on site of former drive-in
Twelve Summer Street	4	4	Leased	No	Family units
Union Crossing	8	8	Leased	No	Family units
Union Street Lofts	5	5	Leased	No	Existing/family housing
Unity House	8	8	Leased	No	Family units; supportive services
Unquity House	139	139	Leased	Yes	RAD (Rent Supp) - Existing Elderly Housing - one high rise
Veteran's Supportive Housing/1323 Broadway Street	7	7	Leased	No	Supportive Housing - Homeless veterans; rehab of former nursing home
Veterans Park Apartments/Schoolhouse Green	8	8	Leased	No	Elderly/Disabled units
Village at 815 Main	5	5	Leased	No	Family units
Village at Hospital Hill	8	8	Leased	No	Elderly/Disabled units
Village at Hospital Hill II	8	8	Leased	No	Elderly/Disabled units
Village at Lincoln Park	3	3	Leased	No	Family - New construction on former amusement park site
Village at Lincoln Park Senior, Dartmouth	8	8	Leased	No	Elderly - New construction
Village at Nauset Green (formerly Campbell-Purcell)	8	8	Leased	No	New construction – Family housing
Village Center/Haydenville	6	6	Leased	No	Family - Rehabilitation of seven scattered site buildings: 11, 13 South Main Street; 1 North Main Street; 148 Main Street; 12 Williams Street; 397 Main Road; Chesterfield
Village Green Phase I	6	6	Leased	No	Family – New construction of two, three-story buildings
Village Green Phase II	8	8	Leased	No	Family - New construction - Phase II - PBVs are at 30% AMI
Voces de Esperanza	24	24	Leased	No	Family - Rehab with 1, 2, and 3 BR units
Wadleigh House	7	7	Leased	No	Supportive services
Washington Square	8	8	Leased	No	Family and Elderly/Disabled units

Property Name	Number of Existing Project-Based		Status at End of FY 2023	RAD?	Description of Project
	Planned*	Actual			
Washington Street SRO, Malden	4	4	Leased	No	Rehab of SRO facility (three-story building) preference for disabled
Washington Westminster House	8	8	Leased	No	New Construction/family
Water Mill (formerly Whitney Carriage)	8	8	Leased	No	Family and Elderly/Disabled units
Wells School Apts	8	8	Leased	No	Adaptive re-use
Westfield Hotel	5	5	Leased	No	Supportive services
Westhampton Senior	3	3	Leased	No	Elderly/Disabled units
Westhampton Woods/Senior Housing-Phase II	2	2	Leased	No	Elderly - New construction of four duplex buildings
Westport Village Apartments	12	12	Leased	No	Elderly/Disabled units
Whipple School Annex	8	8	Leased	No	Elderly/Disabled units
Wilber School	8	8	Leased	No	Family units
Wilkins Glen	82	82	Leased	No	Expiring Use Project - Family - 82 out of 103 EVs converted to PBVs
Winter Gardens	6	6	Leased	No	Family and Elderly/Disabled units
Winter Street	13	13	Leased	No	Family - Workforce rental housing
Winthrop Apartments	8	8	Leased	No	Elderly - New construction of four-story building
Woodland Cove I	8	8	Committed	No	New Construction – Family housing
Woodland Cove II	8	8	Committed	No	New Construction – Family housing
Woods at Wareham	19	19	Leased	No	Expiring Use Project - Family - 19 out of 22 EVs converted to PBVs
Worcester Loomworks 2	8	8	Leased	No	Family - New construction (55 units); former mill site
Yarmouth Green	7	7	Leased	No	New construction, family housing at 30% AMI
YMCA	30	30	Leased	No	Elderly/Disabled units; two units for homeless individuals
YWCA Fina House	7	7	Leased	No	Family units
YWCA Market Street	4	4	Leased	No	Family - Rehab of an existing five-unit building plus a new addition for five units
Zelma Lacey Mishawum	20	20	Leased	No	Supportive services
Total Existing Project-Based:	4,572	4,568			

Differences between the Planned and Actual Existing Number of Vouchers Project Based:

Please note the following updates from what was listed in the FY 2023 MTW Plan:

- 126 Chandler St – updated from 8 units to 7 units (-1 unit)
- Residences at Yarmouth Gardens – removed duplicate entry (-8 units)
- Squantum Gardens II – added to listing, not previously listed (+5 units)

iii. Actual Other Changes to MTW Housing Stock in the Plan Year

This section is required by HUD. EOHLC does not own or manage any federally funded public housing.

iv. General Description of All Actual Capital Expenditures During the Plan Year

This section is required by HUD. EOHLC does not own or manage federally funded public housing nor does it receive public housing capital funds from HUD.

B. Leasing Information

i. Actual Number of Households Served

Table 3 below provides information only on MTW households that EOHLC served during FY 2023. In total, EOHLC served 20,787 households through its HCV MTW program and 239 households in EOHLC’s Local Non-Traditional Programs.

Table 3: Actual Number of Households Served

Number of Households Served Through:	Number of Unit Months Occupied or Leased	Number of Unit Months Occupied or Leased	Number of Households Served	Number of Households Served
	Planned	Actual	Planned	Actual
MTW Public Housing Units Leased	0	0	0	0
MTW HCV Utilized	251,310	249,438	20,943	20,787
Local, Non-Traditional: Tenant-Based	2,113	1,704	176	142
Local, Non-Traditional: Property-Based	1,566	1,164	130	97
Local, Non-Traditional: Homeownership	0	0	0	0
Planned and Actual Totals	254,989	252,306	21,249	21,026

Differences between the planned and actual households served:

The leasing numbers for MTW HCV were lower than planned due to leasing challenges resulting from low unit availability and high rental prices throughout the region. EOHLC continues to focus its efforts on increasing utilization of both MTW vouchers and Special Purpose Vouchers (SPVs), including Emergency Housing Vouchers (EHVs) and additional awards of Mainstream and VASH vouchers, which include services and partnerships to support improved outcomes for participants. Additionally, many local housing authorities in the region continued to select from their waiting lists during FY 2023 in order to increase and improve leasing outcomes, which increased the overall competition among

voucher holders seeking to lease a limited number of affordable units in the region. In FY 2023 EOHLC began the process of updating its waiting lists, which will improve response rates of applicants being selected from the waiting list(s) for voucher assistance.

HUD requires that all MTW agencies submit Tables 4 and 5 below, which report on local, non-traditional housing and services, i.e. housing units and/or supportive services which utilize MTW funds but that are not public housing or HCV-related.

Table 4: Local, Non-Traditional Housing Programs

Local, Non-Traditional Category	MTW Activity	Number of Unit Months Occupied or Leased	Number of Unit Months Occupied or Leased	Number of Households Served	Number of Households Served
		Planned	Actual	Planned	Actual
Tenant-Based	Family Economic Stability (FES) Program, Activity 2000-1	464	684	39	57
Tenant-Based	Youth Transition to Success Program (YTTSP), Activity 2011-5	487	576	40	48
Tenant-Based	Expanding Housing Opportunities: Relocation Assistance, Activity 2018-1	756	300	63	25
Tenant-Based	Residential Assistance for Families in Transition (RAFT)/ERMA, Activity 2018-2	250	0	21	0
Tenant-Based	Massachusetts Student Housing Security Pilot, Activity 2020-1	156	144	13	12
Property-Based	Affordable Housing Preservation and Development Fund, Activity 2018-9	1,566	1,164	130	97
Homeownership	N/A	0	0	0	0
Planned and Actual Totals		3,679	2,868	306	239

Table 5: Local, Non-Traditional Service Programs

Households Receiving Local, Non-Traditional Services Only	Average Number of Households Per Month	Total Number of Households in the Plan Year
Support for Secure Jobs Initiative (Services Only)	44	534
Launch	18	220
A Better Life Program Model	35	423

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

Housing Program	Description of Actual Leasing Issues and Solutions
MTW Public Housing	N/A
MTW Housing Choice Voucher	EOHLC experienced ongoing issues with unit availability, increasing rents, and low vacancy rates across the state. HCV participants are increasingly disadvantaged when searching for housing due to difficulty navigating the leasing process, discrimination from landlords, landlord unfamiliarity with the program, and difficulty finding appropriately sized units.
Local, Non-Traditional – FESP	Fifty-seven households were assisted throughout the year, which exceeded the goal of 50 households. Due to the program’s rolling admission policy and mid-year graduations, not all households were leased for the entire 12-month period.
Local, Non-Traditional – YTTSP	Forty-eight households were assisted throughout the year, which exceeded the goal of 45 households; however, because of graduations and rolling enrollment, not all households were leased for the entire 12-month period.
Local, Non-Traditional – Expanding Housing Opportunities – Relocation Assistance	EOHLC has revised its reporting methods to more accurately describe the assistance provided through this activity. For the “Number of Households Served” in Table 4, EOHLC is only counting households that were relocated to private market-rate units and are receiving an ongoing rent subsidy. Additional households who were temporarily displaced were relocated to other public housing units; these households received MTW-funded moving assistance, but MTW funds are not being used for their ongoing rent subsidy. Because of the availability of other public housing units within the housing authority’s portfolio, fewer households had to be relocated to private market-rate units than expected, so the number served is lower than originally predicted.
Local Non-Traditional – RAFT/ERMA	When additional, more flexible federal and state resources became available for emergency rental and mortgage assistance in 2021, the ERMA program became underutilized. EOHLC decided to terminate the ERMA program effective December 31, 2021. The RAFT/ERMA activity will be closed out as part of EOHLC’s FY 2024 MTW Report.
Local Non-Traditional – Massachusetts Student Housing Security Pilot	EOHLC committed scholarship funding for 20 students and awards were made to 16 in total during the course of FY 2022. Recruitment and enrollment challenges at the college level prevented full enrollment. Twelve students remained enrolled in their post-secondary education programs in the Fall of 2022. Of those 12 students served during FY 2023, one left college just before the end of FY 2023, 10 reached the end of their two-year housing scholarship and remain enrolled in college, and one student remains enrolled in college and will reach the end of their two-year housing scholarship during FY 2024.

Housing Program	Description of Actual Leasing Issues and Solutions
Local Non-Traditional – Affordable Housing Preservation and Development Fund	Construction is not yet complete for Balch Apartments or Lakeview Avenue Apartments; however, EOHLC is on track to preserve the target number of units. For the purposes of determining number of households served for this activity, EOHLC determined the total number of unit months leased across the BHA and CHA projects and divided by 12.

A. Waiting List Information

i. Actual Waiting List Information

Table 6: Waiting List Information at Fiscal Year End

Waiting List Name	Description	Number of Households on Waiting List	Waiting List Status	Was the Waiting List Opened During the Plan Year?
Federal MTW Housing Choice Voucher Program, Federal Non-MTW Housing Choice Voucher Units	Other	60,136	Open	No
Tenant-Based Local Non-Traditional MTW Housing Assistance Program: FES	Other	155	Open	No

Description of waiting lists categorized as “other”:

Federal MTW HCV MTW and Non-MTW Waiting List:	EOHLC combines site-based and centrally managed wait list features. All of EOHLC’s Section 8 programs (including MTW and Non-MTW vouchers) use a regional, centrally managed wait list with the exception of certain Project Based developments. There are currently 201 Project Based developments that have owner managed site-based wait lists. The remaining Project Based developments have centrally managed waitlists maintained by EOHLC and each RAA.
Local Non-Traditional Waiting List:	The Tenant-Based Local Non-Traditional MTW Housing Assistance Program is the Family Economic Stability Program. The waitlist for this program is managed by Metro Housing Boston. Applicants must meet certain requirements such as working at least part-time or participating in a full-time job training program, or be imminently employed (i.e., have offer letter or in negotiations with employer).

Describe any duplication of applicants across waiting lists:

The individuals on the Local Non-Traditional Waiting List for the FES program may also be on the Federal HCV Waiting List.
--

ii. Actual Changes to Waiting List in the Plan Year

Waiting List Name	Description of Actual Changes to Waiting List
No Changes	No Changes

B. Information on Statutory Objectives and Requirements

Under the MTW Agreement between EOHLC and HUD, EOHLC is required to meet certain statutory objectives and other requirements, and to report on them in the MTW Annual Report. The tables below provide the required information.

i. 75% of Families Assisted are Very Low Income

Table 7: Local Non-Traditional Households and Income Levels

Income Level	Number of Local, Non-Traditional Households Admitted in the Plan Year
80% - 50% Area Median Income	7
49% - 30% Area Median Income	3
Below 30% Area Median Income	1
Total Local, Non-Traditional Households Admitted	11

ii. Maintain Comparable Mix

Table 8: Baseline Mix of Family Sizes Served (upon entry to MTW)

Family Size	Occupied Public Housing Units	Utilized HCVs	Non-MTW Adjustments*	Baseline Mix Number	Baseline Mix Percentages
1 Person	NA	6,170	0	6,170	31%
2 People	NA	4,694	0	4,694	24%
3 People	NA	4,323	0	4,323	22%
4 People	NA	2,673	0	2,673	14%
5 People	NA	1,223	0	1,223	6%
6+ People	NA	664	0	664	3%
Total	NA	19,747	0	19,747	100%

*“Non-MTW Adjustments” are defined as factors that are outside the control of the MTW PHA and/or unrelated to the MTW PHA’s local MTW program.

Describe the justification for any “Non-MTW Adjustments” given above:

N/A

Table 9: Mix of Family Sizes Served (in Plan Year)

Family Size	Baseline Mix Percentage	Number of Households Served in Plan Year*	Percentage of Households Served in Plan Year	Percentage Change from Baseline Year to Current Plan Year
1 Person	31%	9,289	43%	12%
2 People	24%	5,362	25%	1%
3 People	22%	3,647	17%	-5%
4 People	14%	2,068	10%	-4%
5 People	6%	840	4%	-2%
6+ People	3%	475	2%	-1%
Totals	100%	21,681		

*Note that the actual number of households served as shown on Table 9 above may differ from the amount shown in Table 3 due to HUD’s requirement for calculating Table 3.

Describe the justification for any variances of more than 5% between the Plan Year and Baseline Year:

The percentage of families in 1 BR units continued to increase in FY 2023 as a result of families aging in place.

The variance in households served shown in Tables 3 and 9 is due in part to the methodology used to populate each table. Table 3 represents the total number of unit months leased divided by 12, and therefore is an average of total households served; whereas Table 9 represents all households that have been served through the fiscal year.

iii. Number of Households Transitioned to Self-Sufficiency in the Plan Year

Table 10: Transition to Self-Sufficiency

MTW Activity Name and Number	Number of Households Transitioned to Self-Sufficiency	MTW PHA Local Definition of Self-Sufficiency
Family Economic Stability (FES) Program, Activity 2000-1	2	Participants who graduate from the program.
Youth Transition to Success Program (YTTSP), Activity 2011-5	8	Participants who graduate and complete the program.
Family Self-Sufficiency (FSS) Program Enhancements, Activity 2012-5	148	Participants who graduate from the program.
Support for the Secure Jobs Initiatives: Vouchers and Services, Activity 2018-3	48	Participants who have secured subsidized or market-rate housing.
Support for the Secure Jobs Initiatives: Services Only, Activity 2018-4	147	Participants whose wage income is equal to or exceeds \$14,820, the estimated wages earned annually if the participant is working 20 hours a week at minimum wage.
A Better Life Program Model, Activity 2018-5	227	Participants who are working at least 35 hours per week.

Launch, Activity 2019-1	97	Participants who are enrolled in an education program or whose wage income is equal to or exceeds \$14,820, the estimated wages earned annually if the participant is working 20 hours a week at minimum wage.
Massachusetts Student Housing Security Pilot, 2020-1	11	Participants who complete their two-year involvement in the EOHLC-funded scholarship program and continue their post-secondary education.**
	0	Households Duplicated Across MTW Activities
	688	Total Households Transitioned to Self-Sufficiency

**Figures should match the outcome reported for all activities where the goal of increased self-sufficiency is used in Section IV of this Annual MTW Report.*

***The Student Housing Security Pilot provided students enrolled in post-secondary education with two years of housing scholarship funding. Students reported as transitioning to self-sufficiency are continuing their education at those institutions. Students will not complete/graduate from this program for two academic years.*

III. Proposed MTW Activities

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

IV. Approved MTW Activities

This section of the Annual Report summarizes and provides a status update on MTW activities that have been previously approved by HUD and implemented by EOHLIC. As required, this section also includes summary information on MTW activities that have not yet been implemented, activities placed on hold by EOHLIC, and closed out activities.

EOHLIC has updated the metrics in the approved activities to reflect HUD's guidance that MTW PHAs are required to track all applicable "Standard HUD Metrics" under each implicated statutory objective for each MTW activity. Accordingly, standard metrics which EOHLIC determined were not applicable to the identified statutory objective were removed.

A. Implemented Activities

Activity 2000-1: Family Economic Stability (FES) Program

Plan Year Approved, Implemented, Amended

Approved FY 2000 and implemented FY 2001.

Description/Update

FES is an assistance model which provides a fixed annual stipend for five years to eligible families, regardless of future income or family composition changes. Within certain guidelines, participants exercise considerable decision-making in the utilization of the funds. Case management and program coordination is provided by Metro Housing|Boston staff. Participants may select any housing unit, which they deem affordable and appropriate for their needs, and which passes a Housing Quality Standards inspection. The FES Program also assists participants in reaching goals related to increasing earned income, career progress, improving credit and financial literacy skills, increasing asset base, and developing a three-year housing stability plan.

Eligibility for the FES Program is targeted to low-income working families who meet the following criteria:

- Are committed to maintaining employment and agree to provide information to assess the effectiveness of the program; and,
- Are working at least part-time, are imminently employed, or are enrolled in a full-time job-training program.
- At voucher issuance, household income must be sufficient to ensure that the tenant share of rent, with the subsidy, is no more than 40% of the monthly income.

FES provides participants with a "flat subsidy" that is not tied to household income. When a participant increases their earned income, as required by the program, their rent subsidy will not decrease. Conversely, if participants lose their jobs, their subsidy will not increase. FES staff and participants work closely to manage employment stability to avoid sudden loss of income. Participants are supported in their housing search and selection to determine the most affordable unit based on family size and

counseled to consider the challenges of a flat subsidy when selecting potential housing. Participants are also required to participate in financial coaching.

EOHLC continues to review and adjust subsidy levels for consistency with housing costs. In each program year, EOHLC reviews expansion of support funds options to include incentive payments for completion of goals such as retaining employment, removal from TANF, or completion of a job training program. Any approved incentives payments will be part of the \$1,800 annual cap.

Program Extensions

EOHLC, on a case-by-case basis, may extend the rental subsidy for an additional six months following a loss of earned income as a result of an economic/health emergency as declared by the Governor or his/her designee.

Hardship Policy

Households meeting the conditions outlined below, may apply for a hardship. All the hardship criteria below relate to hardships caused by an economic/health emergency as declared by the Governor or his/her designee and are only applicable during such emergencies.

- **Subsidy:** In the event of job loss, and a resulting rent burden greater than 40% of household income, participants may request to have their subsidy temporarily returned to their enrollment subsidy level. EOHLC will review and approve these requests in consultation with Metro Housing|Boston.
- **Support Funds:** EOHLC waives the policy prohibiting the use of support funds for rent share in the event of job loss. Note: in order to maintain the availability of flexible support funds to meet other needs, all other available financial supports will be reviewed before releasing support funds.
- **Escrow Funds:** EOHLC allows the use of accrued escrow funds to make payments for essential expenses such as rent or utility payments, including internet access if enrolled in online classes. Note: in order to maintain the availability of escrow funds to maintain an asset base, all other available financial supports will be reviewed before releasing escrow funds.

Impact

The FES Program continued to assist participants in reaching goals related to increasing earned income, career progress, improving credit and financial literacy skills, increasing asset base, and developing a three-year housing stability plan.

The FES Program had 57 participating families during the fiscal year. Two (2) participants graduated during FY 2023 and nine (9) new families enrolled. Of the families participating in FES, 82% have savings, with an average savings of \$3,314, and 51% have accumulated escrow, with an average escrow of \$954. Eighty-nine percent (89%) of participating families have earned income, representing an average earned income of \$45,204. Five (5) households were enrolled in education or job training during FY 2023. At the close of the fiscal year, two (2) new FES households were pending lease-up. The FES Program currently has a waitlist of 155 households.

The following story highlights the impact of the FES Program. JK, who enrolled in the FES program in November of 2018 with a household income of \$28,659, was able to achieve both employment and wage growth while participating in FES. She and her four children were significantly rent-burdened, with rent

costing \$2,300 per month before she was able to secure an FES subsidy. JK received employment support through FES and was hired at Massachusetts General Hospital, where she worked to advance her position and wages. At graduation, JK’s earned income had increased to \$50,313 per year.

At enrollment, JK had \$200 in her savings account, which she increased to \$1,100. She earned an additional \$3,000 in matched escrow savings and \$6,300 in rent escrow, as her flat subsidy was reduced in the fourth and fifth years of the program, giving her a total asset base of \$9,300. She plans to use these funds to further stabilize her financial situation by paying down debt and by making additional deposits into her retirement accounts. Additionally, she plans to purchase therapeutic equipment to assist her autistic child.

In addition to adding job skills and advancing her career, JK actively worked to improve her credit while participating in FES, increasing her score by 107 points from a “very poor” to a “fair” rating. While modest, this steady improvement has allowed her to access higher quality, lower interest loans and position her within striking distance of eligibility for affordable homeownership mortgage products.

Actual Non-Significant Changes

No non-significant changes were made during FY 2023. EOHL has temporarily paused enrollment in FES to explore the impact of the program, the viability of a time-limited flat subsidy program in a high-cost housing market, and whether the model can or should be expanded to other regions in the state.

Actual Changes to Metrics/Data Collection

Metrics have been updated to reflect the anticipated outcomes in FY 2023. The baseline for SS #3 was updated to reflect the baseline participation numbers for the one agency that is administering the FES program. At initial implementation there were two agencies administering the FES program.

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).	\$18,937	\$30,000	\$45,204	Yes
SS #2: Increase in Household Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average amount of escrow of households affected by this policy in dollars (increase).	\$0.00	\$1,150	\$954	No
Average amount of savings of households affected by this policy in dollars (increase).	\$0.00	\$2,500	\$3,314	Yes

SS #3: Increase in Positive Outcomes in Employment Status				
Unit of Measurement	Baseline*	Benchmark	Outcome	Benchmark Achieved?
Unemployed	1 participant	20 participants	6 participants	Yes
	1% of participants	40% of participants	11% of participants	
Employed Part-Time or Full-Time	85 participants	30 participants	51 participants	Yes
	99% of participants	60% of participants	89% of participants	
Enrolled in an Educational Program or Job Training**	0 participants	4 participants	5 participants	Yes
	0% of participants	8% of participants	9% of participants	
<p><i>*Baseline numbers represent data from program implementation at which time two agencies administered the FES program. One agency now administers the FES program, and the target participation is 50 households.</i></p> <p><i>**Participation in education is required only at some point in the program. Totals will vary based on when current participants participate in their required education component.</i></p>				
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).	4 households in FY 2015	7 households	5 households	Yes
SS #5: Households Assisted by Services that Increase Self Sufficiency				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase self-sufficiency (increase).	0 households	50 households	57 households	Yes
SS #8: Households Transitioned to Self Sufficiency*				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self-sufficiency (increase).	0 households	7 households	2 households	No
<p><i>*Self-sufficiency is defined as graduation from the FES Program.</i></p>				

Actual Significant Changes

No significant changes were made.

Challenges in Achieving Benchmarks & Possible Strategies

The average escrow balance and number of households transitioning to self-sufficiency were lower than projected during FY 2023 due to fluctuations in the program size, the year of the program in which

participants are currently enrolled, and the fact that the savings component of FES is not mandatory. Additionally, EOHLC has temporarily paused enrollment in FES to explore the impact of the program, the viability of a time-limited flat subsidy program in a high-cost housing market, and whether the model can or should be expanded to other regions in the state.

Activity 2010-2: Payment Standard Exceptions

Plan Year Approved, Implemented, Amended

Approved and implemented FY 2010.

Description/Update

Under this MTW initiative, EOHLC is authorized to approve any documented and reasonable exception to payment standards as a reasonable accommodation for HCV households with disabled household members without HUD approval.

This policy is utilized without regard to the percentage increase requested over the payment standard. Generally, EOHLC will not impose a limit on the number of exception payment standards; however, EOHLC reserves the right to limit the number of payment standard exceptions when and if budgetary issues arise.

EOHLC will continue to utilize its MTW authority to approve payment standard exceptions without prior HUD approval. EOHLC does not anticipate any significant changes to the volume of requests and outcomes for reasonable accommodation payment standard exceptions in FY 2023.

Impact

In FY 2023, EOHLC received three (3) requests for reasonable accommodation (RA) payment standard (PS) exceptions. EOHLC approved all three requests and two of these households were able to locate and lease units using their voucher as a result. EOHLC's updated payment standards provide disabled households with greater flexibility in locating units and ultimately reduces the number of requests for RA payment standards.

Actual Non-Significant Changes

No non-significant changes were made.

Actual Changes to Metrics/Data Collection

No changes to metrics or data collection methods were made.

Metrics

<i>HC #5: Increase in Resident Mobility*</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	0 households	5 households	2 households	Yes
<i>*These metrics include payment standard exception requests that were granted as a reasonable accommodation. EOHLC has no control over the number of RA payment standard requests made by program participants from year to year.</i>				

Actual Significant Changes

No significant changes were made.

Challenges in Achieving Benchmarks & Possible Strategies

Although the outcome for this activity is less than the benchmark, this metric reflects the number of requests for payment standard exceptions that EOHLC received and approved. EOHLC has no control over the number of RA payment standard requests made by program participants from year to year. Therefore, EOHLC considers the approval of these requests as having achieved the activity's goal and metric of enabling households to move to a better unit and/or neighborhood of opportunity.

Activity 2010-3: Owner Incentive Fund

Plan Year Approved, Implemented, Amended

Approved and implemented FY 2010.

Description/Update

An Owner Incentive Fund pilot initiative was established in January 2010 to promote upgrades to the housing stock in areas of the state with a large percentage of older, deteriorated housing stock. EOHLC's goals for this activity are:

- Leasing higher quality units including incentivizing owners to upgrade existing housing at least one grade level, i.e. from a "C" to a "B" grade, or from a "B" to an "A" grade;
- Increasing the number of units that are accessible to persons with disabilities;
- Expanding the number of units leased in currently underserved neighborhoods; and,
- Encouraging new owner participation.

The program has been implemented by the Berkshire Housing Development Corporation (BHDC) since inception. Participating owners are eligible for a flat fee financial incentive payable over the first year of the HAP contract, provided that their unit is compliant with HQS at all times during this initial term. At the end of the first year under HAP contract, owners are eligible for an additional one-time payment under certain conditions.

EOHLC has the flexibility to adjust the program criteria and payment amounts as needed to respond to local market conditions, particularly when planning an expansion of this program to additional RAAs. EOHLC continues to assess the feasibility of expanding the program to other regions using the same program parameters, with a focus on increasing the number of new landlords participating in the program and increasing the number of units available in high opportunity communities.

In its FY 2024 MTW Plan, EOHLC proposed to put this activity on hold and close it out as part of the FY 2024 MTW Report in order to explore alternative strategies for incentivizing landlord participation and improving housing stock quality statewide.

Impact

In FY 2023, one new owner was added to support two HCV households as a result of the activity. No new accessible units were brought on to the program in FY 2023.

Actual Non-Significant Changes

No non-significant changes were made.

Actual Changes to Metrics/Data Collection

No changes to metrics or data collection methods were made.

Metrics

<i>HC #5: Increase in Resident Mobility</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	0 households	5 households	2 households	No

Actual Significant Changes

No significant changes were made.

Challenges in Achieving Benchmarks & Possible Strategies

From FY 2016 to FY 2022, the Owner Incentive Fund activity yielded an average of only 5-6 upgraded units per year. As a result, EOHLC has decided to put this activity on hold in FY 2024 and close it out as part of the FY 2024 MTW Report. EOHLC will explore other statewide strategies for incentivizing landlord participation and improving housing stock quality.

Activity 2010-4: Development of Local Forms

Plan Year Approved, Implemented, Amended

Approved FY 2010 and implemented FY 2013.

Description/Update

Under this initiative, EOHLC develops local versions of forms, as needed, to streamline processing, utilize “plain language,” address MTW policies, and address local housing market features. New forms are rolled out to RAA contractors as they are completed.

To date, EOHLC has developed an addendum to the PBV HAP contract to reflect EOHLC’s MTW policies, a local version of the FSS Contract of Participation (COP) and Individual Training and Service Plan (ITSP), and a local version of the Privacy Act and Release Form. While the new forms do not result in agency savings, the new forms more accurately reflect EOHLC’s MTW program and policies.

Impact

Due to time constraints and competing priorities, EOHLC did not complete the local versions of the HCV Tenancy Addendum, the Project Based Tenancy Addendum, or PBV Statement of Family Responsibility, which will reflect differences between the provisions in the documents and EOHLC’s MTW policies.

Actual Non-Significant Changes

No non-significant changes were made in FY 2023.

Actual Changes to Metrics/Data Collection

No changes to metrics or data collection methods were made.

Metrics

Please see table on next page.

CE #1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease).	Total Cost Prior to Implementation: \$243,302 Number of Assisted Households: 22,351 Total Time per Form: 0.5 hours Avg. Hourly Rate: \$21.77	Total Cost: \$113,988 Number of Assisted Households: 20,943 Total Time per Form: 0.25 hours Avg. Hourly Rate: \$21.77	Total Cost: \$117,998 Number of Assisted Households: 21,681* Total Time per Form: 0.25 hours Avg. Hourly Rate: \$21.77	Yes. Although the total cost exceeds the benchmark, this is because the total number of assisted households is higher than anticipated. Cost savings were still achieved.
<i>*Represents the number of households served as reported in Table 9. Note that the actual number of households served as shown in Table 9 may differ from the amount shown in Table 3 due to HUD's requirement for calculating Table 3.</i>				
CE #2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	Total staff time required prior to implementation: 11,176 hours Number of Assisted Households: 22,351 Total Time per Form: 0.5 hours	Total staff time required after implementation: 5,236 hours Number of Assisted Households: 20,943 Total Time per Form: 0.25 hours	Total staff time required after implementation: 5,420 hours Number of Assisted Households: 21,681* Total Time per Form: 0.25 hours	Yes. Although the total staff time exceeds the benchmark, this is because the total number of assisted households is higher than anticipated. Time savings were still achieved.
<i>*Represents the number of households served as reported in Table 9. Note that the actual number of households served as shown in Table 9 may differ from the amount shown in Table 3 due to HUD's requirement for calculating Table 3.</i>				

Actual Significant Changes

No significant changes were made.

Challenges in Achieving Benchmarks & Possible Strategies

None.

Activity 2011-2: Supporting Neighborhood Opportunity in Massachusetts (SNO Mass)

(Formerly Your Choice Program & Opportunity Neighborhoods)

Plan Year Approved, Implemented, Amended

Approved FY 2011 and implemented FY 2020.

Description/Update

Under this initiative, EOHLC established the Supporting Neighborhood Opportunity in Massachusetts (SNO Mass) Program. The purpose of EOHLC's SNO Mass MTW initiative is to provide significant supports and encouragement to existing voucher participants and/or new voucher holders who wish to move to areas with empirically documented high-quality schools, healthy environments, and other opportunities. These communities have historically been "off-limits" to voucher holders due to market and administrative restrictions. Through SNO Mass, EOHLC is increasing housing choice for its voucher holders.

Existing participants and/or voucher holders interested in moving into opportunity neighborhoods are provided with counseling both before and after the move through the participating RAAs. Participating households are eligible for security deposit assistance (up to one month's contract rent), plus up to \$2,500 for other allowable pre- and post-move expenses to assist families with accessing services and educational and extracurricular activities for their children in their new neighborhood.

SNO Mass is now offered at all RAAs statewide with SNO Mass Mobility Specialists available at each RAA. Mobility Specialists complete family assessments to determine priorities and establish a housing plan that meets each family's needs. Once families are situated in their new neighborhoods, Mobility Specialists remain engaged for two years to provide post-move counseling. In FY 2023, EOHLC continued to focus outreach and support on existing voucher holders; however, the program may be expanded in future fiscal years to offer services to new voucher holders at initial voucher issuance.

Impact

In FY 2023, the SNO Mass program continued to operate statewide, following the program's expansion in FY 2021. EOHLC has adjusted staffing levels at some of the RAAs to better align with the level of interest from eligible families and the number of moves within and across regions. As in past years, EOHLC also helped the RAAs to identify eligible families to facilitate ongoing outreach efforts.

In FY 2023, the RAAs provided program orientation to 239 interested households, provided counseling to 225 households, and enrolled and engaged 190 households in housing search. Of these households, 53 successfully leased a unit in an Opportunity Area, exceeding the program goals and benchmarks set for FY 2023.

Another highlight from FY 2023 was the completion of a report by Mobility Works about the experiences of SNO Mass participants and their families after moving to a high-opportunity neighborhood. The report found that most families are highly satisfied with their new community. In particular, families described improvements in their quality of life resulting from safer, quieter streets and supportive, resource-rich schools. For example, one parent talked proudly about her child being on the honor roll and being more social at his new school after struggling academically and feeling unsafe in their prior neighborhood. Other

participants talked about how their children were spending more time playing outside in their new community and about how they (the parents) were much less stressed about their children’s safety.

Actual Non-Significant Changes

No non-significant changes were made.

Actual Changes to Metrics/Data Collection

Metrics were updated to reflect anticipated outcomes in FY 2023.

Metrics

HC #5: Increase in Resident Mobility				
Unit of Measurement	Baseline	Benchmark*	Outcome	Benchmark Achieved?
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	0 households	50 households	53 households	Yes
<i>*While RAAs planned to provide orientation to 120 households, EOHLIC expected only 50 households would move/lease up a unit in a better neighborhood as a result of the program.</i>				
HC #7: Households Assisted by Services that Increase Housing Choice				
Unit of Measurement	Baseline	Benchmark*	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase housing choice (increase).	0 households	120 households	239 households	Yes
<i>*RAAs expected to provide orientation to 120 households.</i>				

Actual Significant Changes

No significant changes were made.

Challenges in Achieving Benchmarks & Possible Strategies

The shortage of affordable rental units available in Opportunity Areas remains a challenge in facilitating more SNO Mass moves. While the impact of the program on individual families remains positive, achieving larger-scale change has been difficult.

Activity 2011-4: Multi-Year Recertifications

(Formerly Biennial Recertification Process)

Plan Year Approved, Implemented, Amended

- Biennial Recert and Limit on Interim Recerts: Approved FY 2011; Implemented and modified FY 2012.
- Triennial Recert: Approved FY 2020; Implemented FY 2021.

Description/Update

Under this initiative, the following recertification policies apply:

- Biennial recertifications for all MTW households;
- Annual recertification for zero income households;
- Triennial recertifications for elderly/disabled households with fixed income only (SS/SSI/pension);
- Limit the number of voluntary interim recertifications that an MTW family may complete between regular biennial recertifications to two (2). Required interim recertifications do not count against the limit. The following households are exempt from this provision and are able to complete an interim recertification at any time: elderly and disabled households, households that live in an Expiring Use project on the conversion date and select a PBV, households participating in the SNO Mass program, and FSS households;
- Any household that believes they would benefit from an annual recertification may request an annual income recertification. If a household has requested and is approved for an annual recertification frequency, EOHLC will allow one voluntary interim recertification between annual recertifications.

Hardship

During declared states of economic/health emergencies as declared by the Governor or his/her designee, EOHLC will temporarily lift the limit on voluntary interim rent reductions for non-exempt families. EOHLC will make determinations as to when to re-impose the limit.

Impact

EOHLC continues to benefit from overall cost and time savings for processing biennial and triennial recertifications. As families generally do not have to report increases in income between biennial and triennial recertifications, this activity also has a positive financial impact for families. Average earned income of work-able households increased approximately 4% from FY 2022 to FY 2023.

No households requested a hardship exemption from the interim limit in FY 2023.

Actual Non-Significant Changes

No non-significant changes were made.

Actual Changes to Metrics/Data Collection

No changes to metrics or data collection methods were made.

Metrics

<i>CE #2: Staff Time Savings*</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	<p>Total Time Spent on Activity Prior to Implementation: 50,745 hours</p> <p>Number of vouchers: 20,298</p> <p>Time per Recertification: 2.5 hours</p>	<p>Anticipated Total Time Spent on Activity in FY23: 19,006 hours</p> <p>Anticipated Number of Recertifications: 8,447</p> <p>Time per Recertification: 2.25 hours</p>	<p>Total Time Spent on Activity in FY23: 18,313 hours</p> <p>Actual Number of Recertifications: 8,139</p> <p>Time per Recertification: 2.25 hours</p>	Yes.
*Accounts for time savings from Biennial/Triennial Recertifications and Rent Simplification.				

Actual Significant Changes

No significant changes were made.

Challenges in Achieving Benchmarks & Possible Strategies

None.

Activity 2011-5: Youth Transition to Success Program (YTTSP)

Plan Year Approved, Implemented, Amended

Approved FY 2011 and implemented FY 2013. Amended in FY 2021.

Description/Update

EOHLC initially designed and implemented a time-limited program to provide continued support to and build upon the successes of youth currently participating in its Family Unification - Aging Out of Foster Care Program that were facing the expiration on their subsidy. As the demand for FUP vouchers continued to grow, EOHLC expanded the YTTSP. The YTTSP provides subsidies and support to a broader group of youth, which includes FUP AOP referrals, "College" referrals from DCF, and referrals for individuals enrolled in a full-time designated employment program, referred from other providers outside of DCF. Participants receive a shallow, short-term and time-limited subsidy; supportive services; funds for education, training, and employment related expenses; an escrow account; and case management. Where DCF services are required for participation in this program, participation in the program ends when DCF services end.

EOHLC revised the eligibility requirements for FUP AOP and College Referrals to include individuals who have completed nine college level credits but did not complete a full year of college. This will allow the program to serve individuals who have demonstrated the ability to successfully complete college work, but due to unforeseen issues, may not have been able to continue. Additionally, all YTTSP referrals now have subsidies that hold steady for years one and two and then decrease 15% for the remaining three years.

The following outlines eligibility requirements:

FUP AOP Referrals:

- Referred by DCF;
- Participated in FUP AOP for no less than 18 months;
- Employed for at least 12 hours per week;
- Enrolled in an education or training program at the time of referral. This includes individuals who have completed nine college level credits, but who may not have completed a full year of college;
- Participant in good standing under FUP AOP, including no tenancy violations and current on rent;
- Income eligible for the HCV Program; and,
- Meet other EOHLC eligibility screening requirements.

College Referrals:

- Referred by DCF;
- Enrolled in a full-time or part-time moving to full-time post-secondary degree or Associate's Degree program at the time of referral. This includes individuals who have completed nine college level credits, but who may not have completed a full year of college;
- Income eligible for the HCV Program; and,

- Meet other EOHLC eligibility screening requirements.

Other Agency Referrals:

- Enrolled in a full-time designated employment program;
- Income eligible for the HCV Program; and,
- Meet other EOHLC eligibility screening requirements.

YTTSP will provide participants with:

- A flat rental subsidy that holds steady for the first two years and then steps down annually by 15% for the final three years;
- A matched savings account up to \$800/year; and,
- An annual support budget of \$500 for expenses related to sustaining employment and meeting educational goals.

During periods of economic/health/natural disaster emergencies as declared by the Governor or his/her designee, the following activity changes will be in effect:

Program Extensions

- Any participant who is scheduled to graduate from the program during the six-month period starting from the Governor’s declaration of emergency will be eligible to receive rental subsidy for an additional six months from their planned graduation date. EOHLC may consider longer extensions if necessary, to allow participants to complete their educational program.

Employment Requirements

- Employment requirements are suspended (but not requirements to pay tenant share of rent) if a participant experiences a job loss or reduction in hours as a result of the emergency. In the event that third party verification is not available, EOHLC will process the change using a self-certification and will follow up with third party verification and confirmation from DCF staff.

College Enrollment/Job Training Enrollment

- If a current participant can document that they are unable to meet online enrollment requirements of their educational institution, and/or the enrollment requirements of their job training program, EOHLC will waive enrollment in an education or job training program as a requirement for ongoing participation until the next semester after the declared emergency has been lifted. If in-person classes resume earlier, this waiver will end.
- In the event that third party verification of education/training enrollment status is not available, EOHLC will process the enrollment using a self-certification and will follow up with third party verification and confirmation from DCF staff.

Hardship Policy

- Subsidy: In the event of job loss, participants may request in writing to have their subsidy returned to their enrollment subsidy level. In the event that third party verification is not available, EOHLC

will process the change using a self-certification and will follow up with third party verification and confirmation from DCF staff.

- Subsidy: Until the state of Emergency is lifted, rent subsidies will not be reduced in Years Three and Four.
- Support Funds: EOHLC will waive the policy prohibiting the use of support funds for rent share, in the event of job loss. Note: in order to maintain the availability of flexible support funds to meet other needs, all other available financial supports will be reviewed before releasing support funds.
- Escrow Funds: EOHLC will allow the use of accrued escrow funds to make payments for essential expenses such as rent and utility payments, including internet access if enrolled in online classes. Note: in order to maintain the availability of escrow funds to maintain an asset base, all other available financial supports will be reviewed before releasing escrow funds.

Impact

In FY 2023 EOHLC served a total of 48 households with eleven (11) participants graduating. Participants in YTTSP and College Track make tremendous strides towards self-sufficiency while in the program. DCF staff report that participants develop independent living skills faster than their peers who remain in group living settings, and as a result are better prepared for life after college.

The following is a YTTSP success story. During her two-year participation in YTTSP, MW completed her Bachelor of Science degree at University of Massachusetts, Boston and was accepted into Northeastern University's Physician Assistant Program where she is currently enrolled. Her participation in YTTSP and the rental subsidy made it possible for her to live in the Metro Boston area and to be close to school. Without a lengthy commute, MW was able to access opportunities critical to her academic success and professional development. This would not have been possible had she remained in her prior residential placement, far north of Boston. This experience enabled her to enhance her resume which led to acceptance in a graduate program. MW was able to focus on the academics and did not have to "work to live." She is using her savings to support her housing costs after graduation, and to take out fewer student loans to pay for graduate school.

No households requested hardship exemptions in FY 2023.

Actual Non-Significant Changes

In FY 2023, EOHLC provided graduating College Track and YTTSP participants with an option to extend the existing subsidy for six months to provide time to search for and obtain employment. In this way, graduating participants are provided with a short-term financial "cushion" on their way to economic self-sufficiency. Additionally, EOHLC adjusted the flat rental subsidies provided to YTTSP participants to reflect 120% of the applicable Fair Market Rent.

Actual Changes to Metrics/Data Collection

Metrics were updated to reflect the anticipated outcomes in FY 2023.

Metrics

Please see table on next page.

CE #4: Increase in Resources Leveraged				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Amount of funds leveraged in dollars (increase).	\$0.00	\$380,000*	\$396,000	Yes
<i>*This number is tied to the number of participants</i>				
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).	\$9,492 for current YTTSP participants at time of enrollment	\$35,000	\$45,312	Yes
<i>*Benchmark and outcome reflect only those participants from other agency referrals</i>				
SS #2: Increase in Household Savings				
Unit of Measurement	Baseline	Benchmark*	Outcome*	Benchmark Achieved?
Average amount of savings/escrow of households affected by this policy in dollars (increase).	\$0	\$1,500	\$3,134	Yes
<i>*The benchmark and outcome reflect only FUP AOP and college track referrals.</i>				
SS #3: Increase in Positive Outcomes in Employment Status				
Unit of Measurement	Baseline	Benchmark*	Outcome*	Benchmark Achieved?
Enrolled in an Educational Program or Job Training	7 participants	17 participants	29 participants (out of 29 total)	Yes
	100% of participants	83% of participants	100% of participants	
Unemployed	0 participants	6 participants	2 participants (out of 19 total)	Yes
	0% of participants	22% of participants	11% of participants	
Employed Part-Time or Full-Time	7 participants	19 participants	17 participants (out of 19 total)	Yes
	100% of participants	78% of participants	89% of participants	
<i>*For employment and unemployment, benchmark and outcome reflect only those participants from other agency referrals. For education and job training, the benchmark and outcome reflect only FUP AOP and college track referrals.</i>				

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).	0 households	4 households	2 households	Yes
SS #5: Households Assisted by Services that Increase Self Sufficiency				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase self-sufficiency (increase).	0 households	45 households	48 households	Yes
SS #8: Households Transitioned to Self Sufficiency*				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self-sufficiency (increase).	0 households	25 households	8 households	No
<i>*Self-sufficiency is defined as graduation from the YTTS Program.</i>				

Actual Significant Changes

No significant changes were made.

Challenges in Achieving Benchmarks & Possible Strategies

The benchmark for the self-sufficiency metric was set based on the understanding that all participants referred from other agencies would be reaching the end of their subsidy in FY 2023; however the 5-year subsidies for those participants actually end in FY 2024, not FY 2023. Some households have graduated early or been terminated from the program, so not all of the original 25 participants referred by other agencies will graduate in FY 2024.

Activity 2012-1: MTW Utility Allowances

Plan Year Approved, Implemented, Amended

- UAP \$25 or less, Approved FY 2012; Implemented FY 2012
- Simplified UA Schedule – Heat only, Approved FY 2014; Implemented FY 2014
- Other Electricity, Approved FY 2016; Implemented FY 2017
- Discretionary Periodic UA Review, Approved FY 2019; Implemented FY 2019

Description/Update

Under this initiative, EOHLC established a simplified Utility Allowance (UA) schedule and eliminated Utility Allowance Payments under \$25.

In FY 2014, EOHLC designed a UA model that eliminated all utility allowances except for heat. However, in FY 2017, in response to concerns about rising electricity costs, EOHLC implemented a revision to the UA model to include a utility allowance for other electricity.

In FY 2023, EOHLC introduced utility allowances for cooking and hot water heating in order to respond to inflation and additional financial and economic pressures experienced by low-income families. The utility allowances for cooking and hot water heating are applied to any household who pays for heat or other electricity. This policy will remain in place for a period of two years. At the end of the two-year period, EOHLC will evaluate utility costs and inflationary trends and will determine whether to maintain the UA for cooking and hot water heating or to discontinue it.

EOHLC periodically reviews HCV utility allowance schedules, at its discretion, to determine if adjustments are required. Annual updates are no longer required. In FY 2023, EOHLC updated its utility allowance schedule for other electricity to reflect changes in electricity rates.

EOHLC's UA schedules do not vary by geographical area and/or building type. EOHLC maintains UA schedules for tenant-paid heat and other electricity, and will maintain schedules for cooking and hot water heating, as applicable, that are based upon normal consumption by energy-conscious households as well as by unit size. Utility allowances for any other tenant-paid utilities are not provided. EOHLC determines reasonable accommodations for utilities on a case-by-case basis.

Impact

The total number of households who received a utility allowance in FY 2023 increased by 3% from the prior year. The average utility allowance for households who received a utility allowance during FY 2023 was \$124.

In FY 2023, EOHLC received five (5) reasonable accommodation requests for an additional utility allowance, of which four (4) were approved.

Actual Non-Significant Changes

No non-significant changes were made.

Actual Changes to Metrics/Data Collection

Metrics have been updated to reflect the changes in MTW utility allowances.

Metrics

CE #1: Agency Cost Savings*				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease).	\$31,476,912	\$37,611,396	\$26,339,696	Yes
<i>*Represents total utility allowances with additional UAs added back.</i>				
CE #2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	<p>Total staff time prior to implementation: 2,256 hours</p> <p>Time required to calculate UA: 8 minutes</p> <p>Number of UA calculated in FY 13: 16,919</p>	<p>Anticipated total staff time after implementation: 1,340 hours</p> <p>Time required to calculate UA: 5 minutes</p> <p>Anticipated number of UAs: 16,078</p>	<p>Total staff time after implementation: 1,479 hours</p> <p>Time required to calculate UA: 5 minutes</p> <p>Actual number of UAs: 17,750</p>	<p>Yes.</p> <p>Although the total staff time exceeds the benchmark, this is because the total number of UAs is higher than anticipated. Cost savings were still achieved.</p>
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).	10%	4%	6%	No
CE #5: Increase in Agency Rental Revenue*				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total household contributions towards housing assistance (increase).	\$382 per household in FY 2014	\$323 per household	\$407 per household	Yes
<i>*EOHLC does not have any rental revenue and has been instructed by HUD to report on Average Tenant Rent to Owner.</i>				

Actual Significant Changes

No significant changes were made.

Challenges in Achieving Benchmarks & Possible Strategies

Although the error rate remains above established benchmarks, the error rate decreased from 10% in FY 2022 to 6% in FY 2023, indicating progress towards meeting the benchmark.

Activity 2012-4: Expiring Use Preservation Initiative

Plan Year Approved, Implemented, Amended

Approved FY 2012 and implemented FY 2013.

Description/Update

This initiative was designed to preserve the long-term affordability of expiring use properties. EOHLIC will make use of the resources provided by HUD in the form of Enhanced and Tenant Protection Vouchers to continue the affordability of the units in these projects by converting eligible units immediately to Project-Based Units with a 15-year affordability period.

Since its approval, this initiative has been modified so that MTW flexibilities may extend to units converted to PBV under RAD. Additionally, EOHLIC modified the income eligibility requirements for tenants who occupy units at the time of a RAD conversion to the PBV program.

Impact

In FY 2023, EOHLIC added three (3) additional developments to its RAD and expiring use inventory: 4 units at 616 3rd Street, 6 units 718-724 Second Street, and 16 units at Maribay Apartments. To date, EOHLIC has ten expiring use contracts with a total of 684 units under HAP contract. Additionally, EOHLIC has completed eleven (11) Rental Assistance Demonstration (RAD) conversion projects and currently provides a subsidy for 851 units under this program.

Actual Non-Significant Changes

No non-significant changes were made.

Actual Changes to Metrics/Data Collection

No changes to metrics or data collection methods were made.

Metrics

<i>HC #2: Units of Housing Preserved</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase).	0 housing units	1,371 housing units*	1,535 housing units	Yes
<i>*Previously EOHLIC has included only Expiring Use units when setting benchmarks and determining outcomes for this metric. This figure includes all RAD and Expiring Use units and EOHLIC will continue to use this methodology going forward.</i>				

Actual Significant Changes

No significant changes were made.

Challenges in Achieving Benchmarks & Possible Strategies

The determination of award of RAD and expiring use contracts is a HUD determination; and as such, EOHLIC does not control the ebb and flow of units in this activity.

Activity 2012-5: Family Self Sufficiency Program Enhancements

Plan Year Approved, Implemented, Amended

Approved FY 2012 and implemented FY 2013.

Description/Update

EOHLC uses MTW funds to enhance the existing Family Self-Sufficiency (FSS) Program. These features will encourage participation and successful completion of the program. Features include, but are not limited to:

- Providing matched savings for clients who would otherwise be ineligible for the escrow component of FSS due to their level of earned income at the time they join the program (Savings Match Homeownership Program, SMHP);
- Providing flexible funds for expenses that would otherwise present barriers and thus prevent participants from maintaining or starting employment and/or enrolling in education or job training; and,
- Establishing a \$5,000 incentive payment for FSS graduates that choose to withdraw from the HCV Program within 2 years of completion of the FSS Program and who apply and are approved for homeownership.

In November of 2013, EOHLC also began providing “gap” funding to address financial barriers to employment and increase long-term economic capacity by providing participants with incentives to complete education and training programs before entering the workforce.

In January 2014, EOHLC implemented the revisions to the enhanced FSS program including:

- Placement of an absolute cap on the amount of escrow regardless of prior FSS participation at any of EOHLC’s RAAs statewide. The cap, which may be periodically reviewed and updated at EOHLC’s discretion, will be set at \$25,000 per household; and,
- Modification to the requirement that an FSS applicant must have an interim or annual recertification within 120 days prior to FSS enrollment.

To encourage the goal of homeownership for applicable households in the FSS Program, EOHLC obtained approval to modify its current FSS Program to allow certain households to define a path to homeownership by utilizing individualized homeownership education, financial coaching, required workshops, and a modified savings/escrow component. FY 2022 was the first year where EOHLC’s FSS Savings Match Homeownership Program was fully implemented. This component of EOHLC’s FSS program provides higher income households with the opportunity to supplement the traditional escrow model with an EOHLC match of individual savings. In this way EOHLC is able to assist more families to realize the goal of homeownership.

EOHLC has implemented local versions of the FSS Contract of Participation (COP) and Individual Training and Services Plan (ITSP). The local versions of the COP and ITSP allow EOHLC to reflect MTW program requirements and incentives for FSS participants. While EOHLC continues to maintain local versions of the forms, the FSS Final Rule requirements were incorporated into both forms in FY 2023.

EOHLC anticipates that approximately 50 to 75 new participants will join the FSS Program with a total participation of 900 FSS participants in FY 2023. Additionally, EOHLC anticipates 132 households will graduate from the FSS program in FY 2023 with an average escrow balance of \$4,700.

Impact

In FY 2022 EOHLC implemented the FSS Homeownership Track to provide focused, high-quality support and education for FSS participants with the goal of preparing for homeownership. EOHLC provided additional funding to hire staff to recruit, enroll, and coach both new participants and existing FSS participants (already under contract) interested in more intensive support to help reach their goals. At the close of FY 2023, 171 participants are enrolled in the FSS Homeownership Track. The FSS Homeownership program includes a Savings Match option for higher income FSS families who may not accumulate significant escrow, but who are able to save their own funds. EOHLC will match those savings 3:1, up to a maximum of \$12,000, for use as a down payment or closing costs. Participants in the Savings Match Homeownership Program (SMHP) will be able to accrue escrow in the event that their earned income increases. In FY 2023, SMHP participants saved \$34,448 and earned a total of \$92,548 in match dollars. There are 51 families enrolled in SMHP. The average household income of FSS SMHP participants is \$48,569, a significantly higher income population than EOHLC has enrolled in the past. FSS Homeownership participants are actively engaged in preparing for homeownership – attending HUD-certified Homebuyer classes either in-house or at other agencies, learning about affordable homeownership opportunities in their communities and across the state, and addressing credit and debt issues that may restrict their purchasing power.

FSS participants also had access to professional employment and education planning resources: MassHire Career Partnerships (MCP) and the Credential to Career (C2C) Workshop Series. The former is a partnership between EOHLC and the Executive Office of Labor and Workforce Development (EOLWD) and local Workforce Investment Boards. The latter is a training series offered by One Family Inc., a non-profit with extensive experience working with our shared target populations. All of EOHLC's employment programs provide participants with one-on-one coaching and career planning, accelerated access to training programs, and flexible funding for expenses related to their employment and training goals.

In FY 2023, 166 households joined the FSS Program, and 148 households graduated. EOHLC provided 9 FSS graduating households with a \$5,000 homeownership incentive payment in FY 2023. Homeownership continues to be a primary goal for many FSS households, and FSS "gap" funds have proven critical in enabling FSS households facing financial hardship to maintain employment and educational enrollment on their path towards homeownership and self-sufficiency.

The success of EOHLC's FSS program is evident in the accomplishments of participating households. Notable FY 2023 achievements are outlined below.

- 148 households graduated from the FSS program in FY 2023
- 131 households graduated from the program with escrow funds (89% of all graduates)
- 15 FSS households purchased a home
- 257 households were enrolled in education/training programs

Some of the FSS success stories for FY 2023 are summarized below:

- Matilyn was in her final year of FSS when she joined the MCP program in 2020. She enrolled in a GED program to pursue better employment opportunities and hoped to finish before her FSS contract ended. Despite family challenges, she attended classes off and on but was not able to complete the GED program. She reenrolled in FSS and kept working towards her goal. In early June 2023, Matilyn successfully completed her last test and earned her GED. Matilyn is now working with our Mass Hire Career Navigator (funded through Single Fund Flexibility) to select a job training program in the medical field. Matilyn was also awarded a \$500 scholarship for college from The Abisi Education Center and is considering enrollment at Middlesex Community College.
- One of the early enrollees in the FSS Savings Match Homeownership Program, RR and his wife ZR have been active participants since joining. They completed almost all of the required workshops and have been steadily saving money and earning match dollars. They recently completed the required HUD-certified First Time Homebuyers Course and have begun identifying affordable homeownership mortgage products, possible lenders, and a lawyer to help with the homebuying process. RR and ZR increased their household income by more than \$20,000 since enrolling in the program and will have earned both escrow and matched savings to help them achieve their goal of homeownership.

Actual Non-Significant Changes

No non-significant changes were made.

Actual Changes to Metrics/Data Collection

Metrics have been updated to reflect anticipated outcomes in FY 2023.

Metrics

<i>SS #1: Increase in Household Income*</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase).	\$20,554	\$24,478	\$35,858	Yes
<i>*Represents average earned income for work-able households</i>				
<i>SS #2: Increase in Household Savings</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average amount of escrow of households affected by this policy in dollars (increase).	\$0.00	\$4,700	\$5,954	Yes

Table continues on following page.

SS #3: Increase in Positive Outcomes in Employment Status*				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Unemployed	501 participants	360 participants	179 participants	Yes
	57% of participants	40% of participants	25% of participants	
Employed Part-Time or Full-Time	372 participants	540 participants	540 participants	Yes
	43% of participants	60% of participants	75% of participants	
<i>*Represents work-able households only.</i>				
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).	162 households	75 households	88 households	No
SS #5: Households Assisted by Services that Increase Self-Sufficiency				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase self-sufficiency (increase).	0	900 households	941 households	Yes
SS #6: Reducing Per Unit Subsidy Costs for Participating Households				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average amount of Section 8 subsidy per household affected by this policy in dollars (decrease).	\$931 in FY 2014	\$1,018	\$1,424	Yes While the amount of subsidy per household has increased, this is likely due to increases to contract rent which results in increases to subsidy amounts. Tenant contribution towards rent has increased, which decreases the amount of HAP subsidy paid per household.

SS #7: Increase in Agency Rental Revenue*				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total Household contributions towards housing assistance (increase).	\$388 FY 2014	\$492	\$626	Yes
<i>*Represents Average Tenant Rent to Owner.</i>				
SS #8: Households Transitioned to Self Sufficiency*				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self-sufficiency (increase).	0 households	132 households	148 households	Yes
<i>*Self-sufficiency is defined as graduation from the FSS program.</i>				

Actual Significant Changes

No significant changes were made.

Challenges in Achieving Benchmarks & Possible Strategies

Although the number of households receiving TANF is higher than the benchmark, the total number of households participating in the FSS program is also higher than anticipated, which may result in a slightly higher number of households who are receiving TANF, particularly among households who are newly enrolled in FSS. However, the percentage of overall households receiving TANF remains below 10%.

Activity 2015-1: Rent Simplification

Plan Year Approved, Implemented, Amended

Approved FY 2012; Implemented FY 2012; Modified FY 2016 and FY 2023.

Description/Update

In FY 2012, HUD approved EOHLC's Rent Simplification activity. In FY 2016 and FY 2023, EOHLC received HUD approval on changes to the Rent Simplification activity; however, EOHLC has not implemented any of the changes except for the provisions outlined below. The components of rent simplification, which are currently in effect are as follows:

- Minimum Rent of \$50;
- Exclusion of all Full-Time Student Income;
- Streamlined Earned Income Disregard;
- Streamlined Asset Verification and Calculation;
- Application of the Payment Standard in effect on the effective date of the regular recertification, regardless of any change in the Payment Standard from year to year;
- Application of the Payment Standard used at the last regular recertification during an interim recertification with the following exception:
 - Where households on biennial and triennial recertification cycles have interim recertifications related to increases in contract rents, EOHLC will apply the payment standard in effect at the time of the interim recertification. Where the payment standard in effect at the time of the applicable interim recertification reflects a decrease when compared to the payment standard applied at the last regular recertification, EOHLC will not update the payment standard at the interim recertification and will wait until the next regular recertification to update the payment standard.
- Streamlined approach for calculation of unreimbursed medical expenses by using the prior year's paid, unreimbursed medical expenses plus prospective medical insurance premiums. Over-the-counter medications must be accompanied by a physician's prescription and paid receipt.
- Exclusion of 100% of income received from EOHLC reviewed and approved guaranteed income programs which is paid to support financial stability and economic equality.
- Earned Income Exclusion for Working Families.

In addition to the provisions above, there are a few rent simplification policies which HUD has approved and EOHLC has not yet implemented:

- Revised Mixed Families rent formula where mixed families will pay an additional 10% of TTP regardless of the number of family members without citizenship or eligible immigration status;
- The income disregard for households with children who returned to the unit after completing two- or four-year post-secondary degree or accredited technical school programs.

Impact

EOHLC did not implement the mixed family rent formula or the income disregard for households with children who returned after completing post-secondary or technical school programs in FY 2023. These two rent simplification changes are still planned; however, an implementation schedule has not yet been completed.

EOHLC continued to experience time and cost savings in FY 2023 as a result of the biennial/triennial recertifications component of this activity.

In FY 2023 EOHLC began implementation of the Earned Income Exclusion for Working Families. The exclusion is applied to qualifying households at their regular recertification. A total of 1,560 households benefited from the Earned Income Exclusion in FY 2023. Additional households are expected to benefit from the Earned Income Exclusion throughout FY 2024 at the time of households' regular recertification.

Actual Non-Significant Changes

In FY 2023, in response to current inflationary trends and to the economic impact of the COVID-19 pandemic, EOHLC implemented an earned income exclusion for working families. For families who have earned income, EOHLC provides up to \$5,000 as an earned income exclusion. If the total earned income is less than \$5,000, all earned income is excluded. The Earned Income Exclusion for Working Families does not apply to any income that is already excluded (or eligible to be excluded) by way of the MTW Earned Income Disallowance (EID) for Persons with Disabilities or for adult full-time students. If a family remains eligible for the Working Families exclusion upon the expiration of the EID, the Working Family exclusion may be implemented at that time. FSS families have the option to accept the inclusion, as it will impact escrow.

EOHLC will provide this exclusion for an initial two-year period, at which time EOHLC will review economic indicators and make a determination whether to continue or discontinue the income exclusion.

Actual Changes to Metrics/Data Collection

Metrics were updated to reflect anticipated outcomes in FY 2023.

Metrics

Please see table on next page.

CE #1: Agency Cost Savings				
Unit of Measurement	Baseline*	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease).	Total Cost of Activity Prior to Implementation: \$922,037 Number of vouchers: 20,298 Time per Recertification: 2.5 hours Average Hourly Staff Rate: \$18.17	Anticipated Total Cost of Activity: \$413,761** Anticipated Number of Recertifications: 8,447 Time per Recertification: 2.25 hours Average Hourly Staff Rate: \$21.77	Total Cost of Activity: \$398,669 Number of Recertifications: 8,139 Time per Recertification: 2.25 hours Average Hourly Staff Rate: \$21.77	Yes
<i>*Baseline represents the metrics used when this activity was initially proposed.</i>				
<i>**Accounts for cost savings from Biennial/Triennial Recertifications and Rent Simplification.</i>				
CE #2: Staff Time Savings				
Unit of Measurement	Baseline*	Benchmark	Outcome	Benchmark Achieved?
Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Total Time Spent on Activity Prior to Implementation: 50,745 hours Number of vouchers: 20,298 Time per Recertification: 2.5 hours	Anticipated Total Time Spent on Activity in FY 2023: 19,006 hours** Anticipated Number of Recertifications: 8,447 Time per Recertification: 2.25 hours	Total Time Spent on Activity in FY 2023: 18,313 hours** Number of Recertifications: 8,139 Time per Recertification: 2.25 hours	Yes.
<i>*Baseline represents the metrics used when this activity was initially proposed.</i>				
<i>**Accounts for cost savings from Biennial/Triennial Recertifications and Rent Simplification.</i>				

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)	21% Average error rate for income and rent errors	19%	20%	No
CE #5: Increase in Agency Rental Revenue*				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total household contributions towards housing assistance (increase)	\$382	\$308	\$407	Yes
<i>*EOHLC does not have any rental revenue and has been instructed by HUD to report on average tenant rent to owner.</i>				

Actual Significant Changes

No significant changes were made.

Challenges in Achieving Benchmarks & Possible Strategies

The rent error rate was higher than the benchmark; however, the error rate decreased by 8% from FY 2022 to FY 2023, indicating progress toward meeting this benchmark.

Activity 2018-1: Expanding Housing Opportunities: Relocation Assistance

Plan Year Approved, Implemented, Amended

Approved FY 2018 and implemented in FY 2020.

HUD approved EOHLC's Expanding Housing Opportunities activity in FY 2018. Under this Activity, EOHLC uses MTW funding flexibility to support a comprehensive redevelopment program that will preserve existing state-aided low-income housing. Construction and long-term operating funding are from state and private equity sources. No MTW funds will be used to support construction.

MTW funds are primarily supporting rental subsidies, moving expenses, and start-up costs (e.g., security deposits, vacancy payments) associated with short-term housing for low-income residents during construction. Relocation assistance under this activity is provided to eligible families at or below 80% of AMI.

EOHLC issued an RFP and awarded planning grants to two Local Housing Authorities (LHAs), Somerville Housing Authority (SHA) and Chelsea Housing Authority (CHA), for the preservation and redevelopment of state-aided public housing.

Impact

While EOHLC anticipated construction would start as early as 2020, the Chelsea and Somerville projects were both delayed by the COVID-19 pandemic and the ensuing volatility in the financial, rent, and commodity and construction markets.

The Chelsea project (Innes Apartments) closed in May of 2022, with relocation beginning in the spring. The project broke ground in the early part of FY 2023 with construction estimated to be completed toward the end of FY 2024 or early FY 2025. Fourteen households were temporarily relocated to private, market-rate units and are receiving an MTW-funded rent subsidy. An additional 46 households relocated to other types of housing and will not require a rent subsidy but may be assisted with moving costs and other relocation-related expenses using MTW funding.

The Somerville project (Clarendon Hill) closed during the first quarter of CY 2023. Phase 1A of the project involves the demolition of 72 public housing units and the construction of 168 units, of which 130 represent public housing replacement units and 38 represent net-new affordable housing units. Most tenants in Phase 1A (approximately 40) have been temporarily relocated to other parts of the Clarendon Hill development or to other Somerville Housing Authority public housing developments; MTW funds have been used to assist some of these tenants with relocation-related expenses. A total of 11 residents have temporarily relocated to privately-owned units and are currently receiving an MTW-funded rent subsidy. Construction is not anticipated to be completed for this project until FY 2025 or later.

Actual Non-Significant Changes

No non-significant changes were made.

Actual Changes to Metrics/Data Collection

Both Metric HC #2 and Metric HC #4 were originally being defined as the number of households assisted through this activity, so the benchmark was the same number for both metrics. However, the number of affordable housing units preserved as a result of this activity (HC #2) is not necessarily the same as the

number of households served (HC #4); the outcomes may be different. This update is reflected in the table below.

Metrics

HC #2: Units of Housing Preserved				
Unit of Measurement	Baseline	Benchmark	Outcome*	Benchmark Achieved?
Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase). If units reach a specific type of household, give that type in this box.	0	63	0	No
<i>*EOHLC has updated the definition of this metric to be the number of housing units preserved once construction is complete, rather than the number of households assisted through this activity (which is reported in HC #4).</i>				
HC #4: Displacement Prevention				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households at or below 80% AMI that would lose assistance or need to move (decrease). If units reach a specific type of household, give that type in this box.	0	63	111	Yes

Actual Significant Changes

No significant changes were made.

Challenges in Achieving Benchmarks & Possible Strategies

The projects are on track to achieve their relative benchmarks over the next several years of phased construction. As EOHLC is now more accurately reporting the number of units preserved for HC #2, the Outcome for that metric will be zero until construction is complete.

As discussed in prior reports, COVID-19 related challenges and setbacks resulted in delays to the originally planned schedule of these projects.

Activity 2018-2: Residential Assistance for Families in Transition / Emergency Rental & Mortgage Assistance (RAFT/ERMA)

Plan Year Approved, Implemented, Amended

Approved and implemented FY 2018, amended in FY 2020

Description/Update

In view of changing circumstances and need as a result of COVID-19, EOHLC reversed the planned close-out of this activity as reported in the FY 2019 MTW Annual Report. EOHLC launched the Emergency Rental & Mortgage Assistance (ERMA) portion of this activity on July 1, 2020, to serve renters and homeowners between 50 and 80% AMI who were financially impacted by the COVID-19 pandemic. EOHLC established a joint application for the RAFT and ERMA programs (which had similar policies but served different income groups). RAA staff reviewed applications and worked with applicants and property owners to collect required documentation. Where applicable, EOHLC followed the dictates of PIH Notice 2011-45 regarding HQS inspections.

When additional, more flexible federal and state resources became available for emergency rental and mortgage assistance in 2021, the ERMA program became underutilized. EOHLC decided to terminate the ERMA program effective December 31, 2021. The RAFT/ERMA activity will be closed out as part of EOHLC's FY 2024 MTW Report.

Impact

Between July 1, 2020 and December 31, 2021, a total of approximately \$2.7 million in MTW funds were disbursed to approximately 612 eligible households to cover rent and mortgage arrearages. The average amount of assistance per household was \$4,395.

Actual Non-Significant Changes

As directed by HUD, EOHLC provided a modification to this activity in the FY 2020 Plan Amendment and is restating these non-significant changes as part of the FY 2023 Report. Specifically, in addition to providing assistance for rental and mortgage arrears, under this activity, EOHLC also provided assistance for homeownership expenses such as property taxes, condo fees, and insurance. Eligible low-income households could receive financial assistance of up to \$10,000 in any 12-month period; however, as funding was available and where the COVID-19 pandemic existed for a prolonged period of time, EOHLC reserved the right to increase the \$10,000 assistance limit.

EOHLC screened applicants consistent with PIH Notice 2011-45 including use of third-party verification of income, which was supplemented with information obtained from Massachusetts state databases where applicable.

Actual Changes to Metrics/Data Collection

Benchmarks were adjusted to reflect the impact of alternate sources of funding serving the same population.

Metrics

Please see table on next page.

<i>HC #4: Displacement Prevention</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households at or below 80% AMI that would lose assistance or need to move (decrease). If units reach a specific type of household, give that type in this box	0	50	0	No

Actual Significant Changes

No significant changes were made.

Challenges in Achieving Benchmarks & Possible Strategies

With alternate sources of funding available for the same population and purpose, the number of households served by ERMA significantly decreased. EOHLC decided to terminate the ERMA program halfway through FY 2022. The RAFT/ERMA activity was kept open in FY2023 to ensure that other, more flexible funding sources would be adequate to cover the need going forward, and we have since confirmed that this is indeed the case. As mentioned above, the RAFT/ERMA activity will be closed out as part of EOHLC’s FY 2024 MTW Report.

Activity 2018-3: Support for the Secure Jobs Initiative: Vouchers and Services

Plan Year Approved, Implemented, Amended

Approved FY 2018 and implemented FY 2019.

Description/Update

Under this activity, EOHLC utilizes MTW vouchers and MTW Block Grant funding flexibility to support and expand on the Secure Jobs Initiative (SJI), which provides integrated case management, employment supports, and housing assistance for homeless and low-income families.

EOHLC provides Housing Choice Vouchers to up to 50 eligible families referred from the SJI Program. Supportive services are provided to participants using MTW Block Grant funds. Referrals from SJI are made upon completion of training or job placement. EOHLC screens SJI referrals per its Administrative Plan screening policies. Income, rent, and subsidy are calculated per EOHLC's MTW income and rent policies. As participants leave the program, EOHLC will reissue these vouchers as regular MTW program vouchers and they will no longer be allocated to a participant in the Secure Jobs Program.

The Secure Jobs administering agency, Department of Transitional Assistance, via a lottery, refers eligible families to EOHLC for the Secure Jobs vouchers.

Impact

During FY 2023, 48 Secure Jobs participants utilized vouchers under this activity. A final lottery was completed in March 2023 for Secure Jobs vouchers that had not yet been issued. Going forward, as proposed in EOHLC's approved FY 2024 MTW Plan, EOHLC plans to expand this activity to allow vouchers to be set aside for other vulnerable populations in our communities. In particular, the current shelter crisis in Massachusetts has created an unprecedented need for subsidized housing for households experiencing housing instability. By providing vouchers to households referred from EA family shelters (and other types of shelters, as needed), EOHLC will be able to help relieve the pressure on our state's shelter capacity and provide permanent housing to some of the state's most vulnerable residents.

Actual Non-Significant Changes

No non-significant changes were made.

Actual Changes to Metrics/Data Collection

Benchmarks were updated in the Plan to reflect planned participation and anticipated outcomes for FY 2023.

Metrics

<i>CE #4: Increase in Resources Leveraged</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Amount of funds leveraged in dollars (increase)	\$0	\$180,000	\$412,371	Yes

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).	\$4,341	\$15,000	\$32,996	Yes
SS #3: Increase in Positive Outcomes in Employment Status				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Unemployed	21	17	21	No
	86%	40%	44%	
Employed Part-Time or Full-Time	4	26	27	No
	14%	60%	56%	
Enrolled in an Educational Program or Job Training	Not available	6	1	No
	Not available	15%	2%	
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).	4	11	15	No
SS #5: Households Assisted by Services that Increase Self Sufficiency				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase self-sufficiency (increase).	0 households	43 households	48 households	Yes
SS #6: Reducing Per Unit Subsidy Costs for Participating Households				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average amount of Section 8 subsidy per household affected by this policy in dollars (decrease).	\$1,264	\$1,450	\$1,691	No
SS #7: Increase in Agency Rental Revenue*				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total Household contributions towards housing assistance (increase).	\$150	\$400	\$439	Yes
*Represents Average TTP.				

SS #8: Households Transitioned to Self Sufficiency*				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self-sufficiency (increase).	0 households	43 households	48 households	Yes
<i>*Self-sufficiency is defined as participants who have secured subsidized or market rate housing.</i>				

Actual Significant Changes

No significant changes were made.

Challenges in Achieving Benchmarks & Possible Strategies

This initiative fell just short of its employment goal (60%), with 56% of participants employed in FY 2023. However, this was still an improvement over FY 2022, when 50% of participants were employed. While the economy has improved over the last year, some participants may still be struggling to find a job that matches their interests and skillsets. This may also explain why a slightly higher than expected number of participants was receiving TANF in FY 2023. The lower number of participants enrolled in education/job training during FY 2023 makes sense, given that households must have already completed a training program (and/or obtained a job) in order to be referred for a Secure Jobs voucher and most were referred prior to FY 2023. Finally, the benchmark for average Section 8 subsidy was not quite met, but this is likely a reflection of rapidly increasing rents across the state (participants’ average TTP was higher than the benchmark).

Activity 2018-4: Support for the Secure Jobs Initiative: Services Only

Plan Year Approved, Implemented, Amended

Approved FY 2018 and implemented FY 2019.

Description/Update

In FY 2018, HUD approved EOHLIC's Support for the Secure Jobs Initiative: Services Only activity and EOHLIC began implementation planning. Using MTW Block Grant funding flexibility, this activity builds upon the services portion of the Secure Jobs Initiative (SJI) Program. The clients served under this activity are not participants in the Housing Choice Voucher Program or residents of federal public housing. Low-income participants in this activity receive supportive services, but not vouchers. Leveraging other state and private dollars, MTW Block Grant funds partially support recruitment and referral, intake and assessment, completion of IEPs, job readiness training, career counseling, job development, and connecting participants to employers and post-employment placement services. MTW Block Grant service dollars are used flexibly to pay for small expenses such as licensure tests, RMV fees, transportation passes, uniforms, and other expenses that may act as barriers to successful employment.

Currently, there are executed contracts with 8 partnering agencies who provide services to SJI participants.

Impact

In FY 2023, the eight partner agencies served a total of 534 SJI participants. The following two stories highlight the impact of the program:

- One participant and her family had been doing well until her husband suffered a serious back injury and was no longer able to work. After seeking emergency housing assistance from the RAFT program, the family was referred to the Secure Jobs initiative at SER-Jobs for Progress. Being bilingual, the participant had a strong desire to utilize her ability to speak both English and Portuguese to help those in need in her community. With the help of her Secure Jobs case worker, the participant enrolled at Language Connections, where she pursued certifications in Immigration Law and Medical Interpreting. The participant is now gainfully employed as a PCA/Home Health Aide. Her certifications allow her to help those in her care understand and voice their medical concerns. The participant and her family were issued a Housing Choice Voucher and have been able to start over in their new home.
- Another participant's journey with the Secure Jobs program began after relocating from Florida to Boston with his son and being placed in EA shelter. The participant was referred to JVS, one of the Secure Jobs provider agencies. He had extensive culinary experience and worked with his Career Navigator at JVS to rebuild his resume and apply for numerous jobs. Throughout this time, JVS was able to use flex funds to support the participant and his family with food and transportation. The participant secured a full-time job as a line cook earning \$21 an hour and has been asked to take on a managerial position after only three months. He and his son are in the process of moving into a new apartment. His next goal is to obtain his GED.

EOHLIC's funding commitment to the services component of Secure Jobs ended on June 30, 2023. As explained in EOHLIC's FY 2024 MTW Plan, in light of increased funding for this program in the Massachusetts state budget, it is not expected that MTW funds will be used to support the program in FY 2024 and beyond. EOHLIC plans to close the activity out in the FY 2024 MTW Report. However, the Secure

Jobs initiative is expected to continue to operate and will undoubtedly continue to have a positive impact on the participants it serves.

Actual Non-Significant Changes

No non-significant changes were made.

Actual Changes to Metrics/Data Collection

Metrics were updated to reflect anticipated outcomes in FY 2023. Additionally, the definition of self-sufficiency was updated to reflect the most representative outcome for self-sufficiency.

Metrics

<i>CE #4: Increase in Resources Leveraged</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Amount of funds leveraged in dollars (increase)	\$0	\$1,820,000	\$4,587,629	Yes
<i>SS #1: Increase in Household Income</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase).	\$4,341	\$16,600	\$27,533	Yes
<i>SS #3: Increase in Positive Outcomes in Employment Status</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Unemployed	630	221	306	No
	74%	49%	57%	
Employed Part-Time or Full-Time	177	229	228	No
	22%	51%	43%	
Enrolled in an Educational Program or Job Training	642*	288**	94	No
	78%	64%	18%	
*Represents SJI participants who have a high school level education or less.				
**Represents SJI participants who have a high school level education or less and who enroll in an education or job training program.				
<i>SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving TANF assistance (decrease).	477	122	82	Yes

SS #5: Households Assisted by Services that Increase Self Sufficiency				
Unit of Measurement	Baseline	Benchmark	Outcome*	Benchmark Achieved?
Number of households receiving services aimed to increase self-sufficiency (increase).	0 households	450 households	534 households	Yes
<i>*Does not reflect the 40 SJI participants who were provided Housing Choice Vouchers.</i>				
SS #8: Households Transitioned to Self Sufficiency*				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self-sufficiency (increase).	0 households	100 households	147 households	Yes
<i>*Self-sufficiency is defined as participants whose wage income is equal to or exceeds \$14,820, the estimated wages earned annually if the participant is working 20 hours a week at minimum wage.</i>				

Actual Significant Changes

No significant changes were made.

Challenges in Achieving Benchmarks & Possible Strategies

All benchmarks for this activity were met with the exception of employment and education/training goals. Some of the Secure Jobs providers experienced staffing issues during FY 2023, which created interruptions in service. This likely made it more difficult to achieve the job placement and education/training placement goals that were set at the beginning of the year.

Activity 2018-5: A Better Life Program Model

Plan Year Approved, Implemented, Amended

Approved and implemented FY 2018.

Description/Update

In FY 2018, HUD approved and EOHLIC implemented the “A Better Life” (ABL) Program Model activity. The ABL program serves eligible families in state-aided public housing developments and is intended to provide participants with skills necessary for meaningful employment and to effectively remove barriers to obtaining self-sufficiency. There are four main program components: work/participation requirements, comprehensive case management, community partnerships with local service providers, and an escrow incentive.

Under this activity, four Local Housing Authorities (LHAs) – Chelsea, Gloucester, New Bedford and Taunton – received funding from EOHLIC to plan for the operation of the ABL program at their state-aided public housing developments. In FY 2019, EOHLIC awarded three of the four LHAs (Gloucester, New Bedford, and Taunton) implementation grants.

MTW Block Grant service dollars have gone to support Family Life Coaches at the three LHAs who conduct outreach to residents, inform them about the program requirements and benefits, and help them set personal goals in the areas of employment, education, family health and stability, and asset building. MTW funding is also used to cover expenses that will help participants pursue their employment goals (e.g., drivers’ education, job training and certification fees). LHAs are leveraging existing relationships with local service providers and using the ABL grant to partner with new ones.

The work requirement component of ABL was not enforced during the pandemic. In the spring of 2022, EOHLIC worked in collaboration with the LHAs to revise the ABL requirements to make program compliance more attainable for residents; the revised policies took effect in FY 2023.

Impact

ABL coaches reported that tenants responded positively to the ABL policy changes made in FY 2023. With program compliance more attainable and the consequences of noncompliance less severe, tenants seemed less hesitant to engage with a coach. The average number of coaching meetings per participant increased from 2.6 meetings in FY 2022 to 4.4 meetings in FY 2023. Increased engagement with ABL coaches, combined with an improving post-pandemic economy, may explain the noteworthy increases in employment rates among ABL participants. Whereas only 33% of participants were employed in FY 2021 and 47% were employed in FY 2022, three-quarters (75%) of participants were employed in FY 2023. The average earned income and average amount of savings/escrow also increased from FY 2022 to FY 2023.

The two stories below illustrate the ways in which ABL can help participants pursue their education and employment goals:

- A 23-year-old single mother of a 4-year-old child had been working full-time at a manufacturing company, but she was unsatisfied with the type of work she was doing. Her ABL coach provided her with information about trainings and courses available at local colleges. The participant expressed interest in the Dental Assistant course at North Shore Community College (NSCC). ABL helped her to enroll, assisted with the cost of the course, and reimbursed her for transportation to and from the college. Since then, the participant has not only completed the Dental Assistant

course, but also received certification from the Henry Goldman School of Dental Medicine at Boston University as part of the NSCC accreditation. With the help of her coach, the participant is now working on updating her resume and cover letter and applying to positions in the dental field. The coach reports that the ABL program has helped the participant to grow both professionally and personally and the participant has become more self-confident.

- One ABL participant did not have a high school diploma when she enrolled in the program in the fall of 2019, but she had goals for a better future. In 2021, she enrolled in GED/HiSET courses. Although she soon became pregnant with twins, she remained focused on her goals and engaged in the program. She obtained her GED/HiSET in 2022. Earlier this year, she continued pursuing her education goals by enrolling at Southeastern Tech and applying for a medical assistant training program. She passed the test for the training program, received help from ABL to purchase supplies and cover her test fee and class seat reservation, and will begin classes this fall.

Actual Non-Significant Changes

No non-significant changes were made.

Actual Changes to Metrics/Data Collection

Metrics were updated to reflect anticipated outcomes in FY 2023.

Metrics

<i>SS #1: Increase in Household Income*</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase).	\$24,659	\$26,000	\$35,028	Yes
<i>*Metrics reflect avg. earned income of participants who are employed.</i>				
<i>SS #2: Increase in Household Savings*</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average amount of savings/escrow of households affected by this policy (in dollars)	\$0	\$900	\$3,804	Yes
<i>*Metric reflects avg. participant escrow which is one of the identified indicators of program success.</i>				

Table continues on following page.

SS #3: Increase in Positive Outcomes in Employment Status				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Unemployed	189	267	133	Yes
	66%	58%	25%	Yes
Employed Part-Time or Full-Time	97	193	390	Yes
	34%	42%	75%	Yes
Enrolled in an Educational Program or Job Training	0	46	103	Yes
	0%	10%	20%	Yes
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).	73	92 households 20%	110 households 21%	No
<i>*Benchmark reflects the number of participants as a percent of the anticipated households.</i>				
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).	286	460 households	423 households 523 participants	No
SS #7: Increase in Agency Rental Revenue				
Unit of Measurement	Baseline*	Benchmark	Outcome	Benchmark Achieved?
Total Household contributions towards housing assistance (increase).	\$439	\$550	\$624	Yes
<i>*Represents the avg. tenant rent for the 286 initial participating households.</i>				

SS #8: Households Transitioned to Self Sufficiency*				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self-sufficiency (increase).	0 participants	87 participants	227 participants	Yes
<i>*Self-sufficiency is defined as at least 35 hours of employment per week for an individual participant.</i>				

Actual Significant Changes

No significant changes were made.

Challenges in Achieving Benchmarks & Possible Strategies

Although the number of households served in FY 2023 (423) was slightly below the benchmark (460), some households have multiple adults participating in the ABL program, so EOHLC did exceed the benchmark when looking at the total number of ABL participants (523) for the year. There was also a slightly higher than expected number of participants receiving TANF in FY 2023, but it was still a lower number and percentage of participants compared with FY 2022 and may reflect new participants who enrolled in the program during FY 2023.

Activity 2018-7: Enhanced Local Project-Based Voucher Program

Plan Year Approved, Implemented, Amended

Enhanced Local PBV: Approved and implemented FY 2018; PBV Site-Based Waiting Lists were approved in FY 2010 and implementation began in FY 2013.

Description/Update

In FY 2018, HUD approved EOHLC's Enhanced Local Project-Based Voucher Program activity. Through its Project-Based Voucher (PBV) Program, EOHLC partners with for-profit and non-profit housing providers to expand the supply of affordable housing to low-income families. To meet the evolving needs of the Agency and the residents served, EOHLC enhanced and expanded its existing PBV Program as follows:

- EOHLC authorized owners/managers of PBV developments to be responsible for all PBV waiting list intake and management functions for their developments. Applicants contact the owner/manager of a specific development in order to file an application. Applicant files and the waiting list itself are maintained at the development site. Owner/managers are responsible for contacting and screening applicants who come to the top of the waiting list, collecting all needed information from the applicant, and then forwarding the applicant to the RAA for eligibility determination and processing.
- Increase the 20% cap on PB units in EOHLC's portfolio. EOHLC will use 40% as the cap for budget authority allocated to Project-Based vouchers.
- Project base up to 100% of the dwelling units in any PBV project or building.
- Initial PBV rents will continue to be determined in conformance with the provisions of 24 CFR 983.301 through 983.305 as applicable; however, for re-determined rents to owners of PBV units, rent to owner will not exceed the lowest of the following amounts:
 - The reasonable rent;
 - The rent requested by the owner; or,
 - Such other amount determined by EOHLC to be appropriate for the unit, based upon the nature of the unit and the RFP from which the owner was selected. For example, in certain cases, EOHLC believes a shallower or higher subsidy may be more appropriate.
- Waive the option that allows PBV participant families to move with a tenant-based voucher after one year of assistance in a project-based unit (not yet implemented).

EOHLC will retain its existing MTW policy and continue to allow project-based participant requests for tenant-based vouchers with threshold caps for each RAA. In a prior plan year, EOHLC received approval to discontinue providing tenant-based vouchers to project-based participants; however, EOHLC may choose not to implement this portion of the approved activity.

Impact

In FY 2023 EOHLC continued to use the flexibilities of its local PBV Program; however, EOHLC did not yet implement the new opt-out policy or the PB transfer preference. EOHLC continued to use its previously approved opt-out policy, which caps the number of opt-outs in any given year. In FY 2023, sixty-five (65) vouchers were issued to PBV opt-outs.

Thirty-eight (38) new PBV contracts were awarded in FY 2023 representing an additional 282 new PBV units. Owner managed site-based waiting lists are established for all of the new PBV contracts.

Actual Non-Significant Changes

No non-significant changes were made.

Actual Changes to Metrics/Data Collection

HC #4 was updated to reflect the total of existing PBVs and anticipated new PBVs in FY 2023. The number of anticipated new PBVs is projected based on prior fiscal years.

Metrics

<i>HC #4: Displacement Prevention</i>				
Unit of Measurement	Baseline	Benchmark	Outcome*	Benchmark Achieved?
Number of households at or below 80% of AMI that would lose assistance or need to move (decrease).	0	4,822	4,850	Yes
<i>*Number of units in PBV developments where commitments were made or where the units were under AHAP or HAP by the close of the fiscal year.</i>				

Actual Significant Changes

No significant changes were made.

Challenges in Achieving Benchmarks & Possible Strategies

None.

Activity 2018-9: Affordable Housing Preservation and Development Fund

Plan Year Approved, Implemented, Amended

Approved and implemented FY 2018.

Description/Update

In FY 2018, HUD approved and EOHLIC began the implementation of the Affordable Housing Preservation and Development Fund activity. Under this activity, EOHLIC utilizes MTW Block Grant funds to support the development and preservation of affordable rental housing units through implementation of a new Affordable Housing Preservation and Development (AHPD) Fund. AHPD funds will provide loans or grants to eligible projects to leverage state-aided public housing capital resources, private equity, privately raised debt, tax credits, proceeds from land and property disposition, and other applicable local and federal resources to preserve and modernize units serving Extremely Low Income (ELI) populations while advancing opportunities for net-new housing production.

AHPD funds support the development and preservation of rental units targeted for households earning less than 80% of Area Median Income. EOHLIC requires deed restrictions or other legally binding covenants to ensure long-term affordability in conformance with HUD Notice PIH 2011-45 and/or other applicable HUD guidance. Where AHPD provides loans to a project, the minimum affordability term is thirty years unless otherwise approved by HUD. Units must meet HQS standards throughout the term.

Under this activity, EOHLIC has used MTW funds for several different affordable housing preservation and development initiatives, detailed below.

Modernization to Independence (MTI)

Under this activity, EOHLIC has used MTW funds to support the Modernization to Independence (MTI) initiative. The purpose of MTI is to rehabilitate existing state public housing developments, provided that the rehabilitated development will include the same number of state public housing units as before (serving households of comparable sizes and income levels) and will not require any state public housing capital or operating subsidies following completion of rehabilitation. MTI is intended to preserve these units while allowing EOHLIC to redirect its state capital and operating subsidies to better support the balance of the state portfolio. Two projects, one at Boston Housing Authority and one at Cambridge Housing Authority, received MTW funding totaling approximately \$5.3 million as part of this initiative.

Modernizing Public Housing And Supporting Elders (ModPHASE)

EOHLIC is also using MTW funds for the preservation and development of affordable housing for low-income elderly and disabled households through an initiative called Modernizing Public Housing And Supporting Elders (ModPHASE). Working in partnership with the Executive Office of Elder Affairs, EOHLIC is providing financial support to preserve Chapter 667 state public housing developments with high capital needs and facilitate partnerships between LHAs and local service agencies to provide service-rich environments that allow residents to age in their community. EOHLIC is utilizing MTW funding up to \$5 million to support housing preservation at two projects, Lowell Housing Authority's Lakeview Avenue Apartments and Beverly Housing Authority's Balch Apartments.

In FY 2023, EOHLIC proposed and received HUD approval to provide MTW funding under this activity to support the development and preservation of rental units targeted for low-income households through

the following three funding programs, pursuant to Notices of Funding Availability (NOFAs) published in October 2022.

Scattered Site Consolidation

The 705 Scattered Site program is a state-funded family public housing program that aims to provide housing for low-income families in neighborhoods throughout the state. Housing authorities have difficulty maintaining state-funded scattered site family units in older one- to three-family homes. Concentrating these scattered sites into small (10-20 unit) developments with modern construction will preserve the benefits of having small developments integrated into the community while giving residents access to better-maintained, modern homes with accessible and sustainable features. Replacement housing developments will be funded by MTW funds, proceeds from disposition, and local funds. EOHLC will provide up to \$25 million in MTW funding to support the scattered site consolidation project including disposition and replacement, through new construction, of approximately 100 family housing units.

Repositioning State Funded Public Housing

MTW funding will be utilized to rehab or redevelop approximately 400 state-funded public housing units owned by LHAs to HQS or higher standards. Following the rehab, these units will be accepted into the HUD public housing portfolio using available Faircloth authority. This may involve a Faircloth-to-RAD transaction at the PHA's discretion. EOHLC will provide up to \$30 million in MTW funding to support these repositioning efforts. There is a rolling application process for this activity.

Recapitalizing Multifamily Developments

EOHLC will utilize approximately \$1 million in MTW funds to support the long-term preservation of one Section 8 New Construction/Substantial Rehab property with a total of up to 10 units. Funds will be utilized to conduct capital needs assessments and undertake moderate to substantial rehabilitation for properties with poor capital condition, low reserves, and little ability to increase Housing Choice Voucher rents. These efforts will result in improved living conditions and preservation of the least well-resourced project-based Section 8 properties once they no longer have access to EOHLC public housing technical assistance and emergency funding. Contract administration for these properties is being transferred from EOHLC to MassHousing by HUD.

Total commitments across these three sub-initiatives will not exceed \$55 million. In its FY 2023 plan, EOHLC also clarified that either loans or grants can be provided to projects funded under this activity.

Impact

The following AHPDF projects have been funded under the **Modernization to Independence (MTI)** part of this activity and were completed prior to FY 2023:

- **Boston Housing Authority, Camden Apartments:** MTW funding of approximately \$4 million leveraged approximately \$25 million in other funding sources (including permanent debt, federal 4% LIHTC, state and federal historic tax credits, a seller note, and FHLB soft debt) to preserve an apartment building built in 1949, consisting of 72 units. Relocation of existing tenants and phased, substantial rehabilitation of the property began in FY 2019. The scope of work included updating the fire alarm system and all kitchens and bathrooms, completing accessibility and common area upgrades, installing new energy-efficient mechanical systems, and updating landscaping

throughout. A full certificate of occupancy was issued in July of 2020 and the permanent loan was closed in FY 2021.

- **Cambridge Housing Authority:** The CHA project consisted of improvements at three different group homes collectively serving 25 adults with mental illness (98 Aberdeen Ave., 11 Woodbridge Street, and 71 Hammond Street). MTW funding of approximately \$1.2 million was used to leverage another \$422,000. Work at 98 Aberdeen Ave. was completed and the property was fully occupied by the end of FY 2021. Construction at 11 Woodbridge Street was completed in early October 2021, and residents moved back that month. Construction work at 71 Hammond Street consisted of only exterior repairs, and the building remained fully occupied during construction. Much of the work at all three properties was completed by the end of 2021, but the delayed delivery of some items due to supply chain issues resulting from the COVID-19 pandemic pushed full completion of construction to February of 2022. All units are now occupied.

The following **ModPHASE** projects funded through AHPDF are ongoing:

- **Lowell Housing Authority, Lakeview Avenue Apartments:** Lakeview Avenue Apartments remained under construction during FY 2023. Construction began in May 2022 and is anticipated to be completed in or around the third quarter of calendar year 2023. Change orders to dispose of contaminated soils and to fund additional structural engineering delayed the project. MTW funding of up to \$3 million is being used to leverage approximately \$2 million from other funding sources to rehabilitate 20 units, including kitchen and bath modernizations and fire safety, electrical, and accessibility improvements.
- **Beverly Housing Authority, Balch Apartments:** MTW funding of approximately \$2 million has been used to leverage an additional \$1 million from other sources to complete building envelope improvements, door replacements, kitchen and bathroom upgrades, one ADA unit conversion, electrical distribution, and site and walkway improvements in 26 units at Balch Apartments. Construction began in June 2022. Though previously expected to finish in the spring of 2023, unforeseen existing conditions necessitated extensive changes to the scope of work that were mandated by the City of Beverly and its fire department. Construction is now anticipated to be complete in late fall of 2023.

The deadline for **Scattered Site Consolidation** applications was in June of 2023. EOHLIC received seven applications and has recommended four projects to receive a combined \$18.9 million in funding. Awards will likely be made in the third quarter of calendar year 2023.

Applications for the **Repositioning State Funded Public Housing** initiative are accepted on a rolling basis. In June of 2023, EOHLIC awarded the Worcester Housing Authority a \$2.175 million grant to help fund the first phase of rehabilitation and federalization of 29 state-aided public housing units at the housing authority's Curtis Apartments complex.

The deadline for the **Recapitalizing Multifamily Developments** applications was in February of 2023; one application was received, with EOHLIC making a \$1 million award to Barre Housing Authority. Pre-construction activities are currently occurring.

Actual Non-Significant Changes

No non-significant changes were made.

Actual Changes to Metrics/Data Collection

Metrics were updated in the FY 2023 Plan to reflect anticipated outcomes in FY 2023. No additional changes were made to metrics.

Metrics

CE #4: Increase in Resources Leveraged				
Unit of Measurement	Baseline	Benchmark	Outcome*	Benchmark Achieved?
Amount of funds leveraged in dollars (increase).	\$0	\$4,839,471	\$25,735,664	Yes
<i>*Defined as total funds leveraged for all completed projects.</i>				
HC #1: Additional Units of Housing Made Available				
Unit of Measurement	Baseline	Benchmark	Outcome*	Benchmark Achieved?
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase).	0	229	0	No
<i>*Defined as new units constructed. Does not include existing units that have been rehabilitated and/or demolished and re-constructed. Existing units undergoing reconstruction are reflected in HC #2.</i>				
HC #2: Units of Housing Preserved				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase).	0	229	97	No

Actual Significant Changes

No significant changes were made in FY 2023.

Challenges in Achieving Benchmarks & Possible Strategies

For HC #1, the existing projects completed and/or underway to date do not add any new units to the existing projects; rather, they preserve and rehabilitate existing units. The benchmark for this metric will be adjusted in future Plans and Reports to anticipate the number of new units to be created and will not include existing units that have been rehabilitated and/or demolished and re-constructed, as those units are reflected in HC #2.

Construction is not yet complete for Balch Apartments or Lakeview Avenue Apartments. EOHL is on track to preserve the target number of units.

Activity 2019-1: Launch

(Formerly Pathways to Prosperity)

Plan Year Approved, Implemented, Amended

Approved and implemented FY 2019.

Description/Update

Under the Launch program, EOHLC committed up to \$2M per year for three years, in MTW Block Grant funding flexibility to connect low-income youth ages 18-24, living in subsidized housing in the Boston area, to programs and services that help them obtain employment and a sustaining wage. EOHLC contracted with the United Way of Massachusetts Bay to recruit, engage and connect targeted youth to employment readiness, job placement, vocational training, certificate programs and/or other post-secondary education programs.

For Launch participants who are also participants in EOHLC's federal HCV Program, EOHLC may exclude 100% of the increase in earned income for up to a 3-year period. The exclusion period begins after enrollment in Launch, at the point where earned income increases and continues regardless of employment status, until the end of the period determined by EOHLC.

EOHLC has connected with other employment training and referral agencies who are responsible for referring low-income adults outside of the 18-24 age range to area job training providers such as Secure Jobs, Jewish Vocational Services and/or One-Stop Career Centers.

Phase II of the Launch partnership ("Launch 2.0") began in FY 2021 and ended midway through FY 2023 (in February 2023). EOHLC put this activity on hold in the FY 2024 MTW Plan and intends to close it out as part of the FY 2024 MTW Report.

Impact

During the first half of FY 2023, the Launch partners continued doing outreach to eligible youth living in subsidized housing. However, given the approaching program end date in February 2023, the primary focus was on ensuring that existing participants were able to make progress on short-term goals and develop and execute transition plans. As the program drew to a close, the United Way and the Forum for Youth Investment gathered valuable feedback about the program from staff and participants. The Forum's final analysis included the following findings:

- A total of 220 young people (average age of 20) participated in Launch.
- Of those, 50 percent identified as Hispanic/Latino and 42 percent identified as non-Hispanic Black or African American.
- On average, participants interacted with their coach 1.5 times per week.
- Of the 192 clients that set a goal, 87 of them (45 percent) completed at least one of their goals.
- Among the small subset of clients (N=19) who provided wage information both at enrollment and upon obtaining a job during Launch, the average wage increased from \$13.77/hour at enrollment to \$18.80/hour after Launch, and this increase in wages was statistically significant ($p < .05$).

- Goal completion rates varied by the frequency of client interactions in an average week. Not surprisingly, clients with the highest levels of weekly interactions with their coach (i.e., more than 2 interactions per week, on average) were the most likely to complete goals, with 70 percent of these clients completing at least one goal. This compares to 55 percent of clients with medium levels of weekly interactions (i.e. 1-2 interactions per week) and only 32 percent of clients with low levels of weekly interactions (i.e., 1 or fewer interactions per week). The difference between groups was statistically significant (p<.001).
- Among Launch participants who completed a survey, 85 percent agreed or strongly agreed that Launch helped them to figure out the right goals to pursue, be more intentional about making plans, and connect to mentors for support.

As discussed in previous reports and below, challenges stemming from the pandemic, staff turnover, and data-sharing made it difficult for Launch to achieve the scale and outcomes that were originally envisioned. Nevertheless, it is clear that many young people who enrolled in Launch benefitted from the coaching and supports they received and made progress toward their goals. EOHLC learned valuable lessons from the Launch initiative and will apply these lessons to future programming in the youth and/or economic mobility domains.

Actual Non-Significant Changes

No non-significant changes were made.

Actual Changes to Metrics/Data Collection

Metrics were updated to reflect anticipated outcomes in FY 2023. Additionally, EOHLC removed metric SS #4 – Households Removed from Temporary Assistance for Needy Families. Launch collected data on the receipt of TANF at intake only and not during any subsequent data collection. This metric is not indicative of program success.

Metrics

<i>CE #4: Increase in Resources Leveraged</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Amount of funds leveraged in dollars (increase)	0	\$0	\$50,000	Yes
<i>SS #1: Increase in Household Income</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase).	\$9,492	\$20,000	\$24,759	Yes

Table continues on following page.

SS #3: Increase in Positive Outcomes in Employment Status				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Unemployed	170	234	145	Yes
	85%	73%	66%	
Employed Part-Time or Full-Time	30	86	75	Yes
	15%	27%	34%	
Enrolled in an Educational Program or Job Training	20	118	73	No
	10%	37%	33%	
SS #5: Households Assisted by Services that Increase Self Sufficiency				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase self-sufficiency (increase).	0 households	320 households	220 households	No
SS #8: Households Transitioned to Self Sufficiency*				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self-sufficiency (increase).	0 households	150 households	97 households	No
<i>*Self-sufficiency is defined as participants who are enrolled in an education program or whose wage income is equal to or exceeds \$14,820, the estimated wages earned annually if the participant is working 20 hours a week at minimum wage.</i>				

Actual Significant Changes

No significant changes were made.

Challenges in Achieving Benchmarks & Possible Strategies

The Launch program encountered several challenges in meeting its enrollment benchmarks over the past three years. The most notable challenge was the COVID-19 pandemic. When the pandemic began in 2020, outreach for the Launch program pivoted to being completely virtual and remained virtual through the end of the program. While this remote approach worked well for some clients, not being able to connect with potential clients and their families in person made it more difficult for outreach staff to build trusting relationships and created a longer on-ramp for connecting clients to coaching.

Outreach was also hindered by staffing and data-sharing issues. Many of the benchmarks for this program were set with the assumption that there would be two full-time outreach specialists and that robust outreach would be conducted to the large number of eligible participants in Metro Housing|Boston’s HCV program. However, for most of the program’s duration, there was only one outreach specialist (at the Boston Private Industry Council) and transferring participant data from Metro Housing to the PIC proved more challenging than expected. As a result, Launch did not enroll as many participants as anticipated.

As Launch neared its contract end date in February 2023, the partner agencies' primary goal was to ensure participants were able to make progress on short-term goals and develop and execute transition plans. When participants were reminded about the end of the program approaching, some found that to be a natural ending point (particularly if they had already achieved certain goals or were already attending school/training), and they disengaged from coaching. Other participants continued working on their goals through the end of the program and worked with their coach to find a good referral partner to be matched with.

Finally, it is worth noting that the outcomes reported above reflect about 8 months of programming (since the program ended in February) as opposed to a full year.

Activity 2020-1: Moving to College

(Formerly Massachusetts Student Housing Security Pilot)

Plan Year Approved, Implemented, Amended

Approved FY 2020. Implemented FY 2021.

Description/Update

EOHLC utilizes MTW Block Grant funding flexibility to support a housing stability program for college students who are experiencing homelessness. Specifically, EOHLC works in partnership with the Department of Higher Education (DHE), the Interagency Council on Housing and Homelessness (ICHH), and the Department of Secondary Education (DESE) on the Moving to College initiative (f/k/a Massachusetts Student Housing Security Pilot Program), which provides scholarships for housing and other college-related expenses to income-eligible, homeless college students. Four state universities and four community colleges work together to recruit, enroll, and support students participating in the program.

EOHLC is providing up to \$200,000 in MTW funds per year for two years for eligible students' housing scholarships. The partnership is governed by an Interagency Service Agreement (ISA) for fiscal management and a Memorandum of Understanding (MOU), and at the program level by the Moving to College Program Guidebook. EOHLC has established requirements for compliance, as well as reporting requirements in the MOU. DHE, the ICHH, and the local colleges have a standing committee that is responsible for reporting to EOHLC both on compliance and MTW reporting requirements. In addition, EOHLC works with these agencies to approve all program guidance created by the committee. Continued funding will be contingent on compliance with HUD requirements and the MOU.

Local colleges are responsible for identifying eligible participants, defined as currently admitted, full-time students, who are HCV income eligible, meet HUD's definition of Unaccompanied Homeless Youth or have recently aged out of foster care and meet HUD's criteria of an independent student. Colleges utilize FAFSA applications to determine income eligibility as well as the amount of funds needed for housing and college-related expenses such as classes, supplies, etc. DHE is responsible for ensuring that participants meet HUD's criteria of an independent student. Based on individual participant housing needs, DHE may issue up to \$13,000 per participant in MTW funds for housing-related costs, per school year. Note: these funds will increase slightly each year in response to increased housing costs at the colleges. EOHLC will fund a two-year scholarship per student, and DHE/EOHHS has identified additional funding sources to support students for the final two years of their four-year degree program. Housing-related costs are limited to housing assistance, in the form of rent for housing and dormitory costs and may include security deposits. Identified housing is subject to HUD's HQS requirements, and participants are permitted to reside in shared housing. Each dormitory room will be required to pass HQS. Inspectors are required to document proper training/certification. HQS inspection records are forwarded to and maintained by EOHLC.

Participants must continue to remain enrolled full-time and maintain passing grades to be eligible for a renewed scholarship each academic year. Students receiving assistance are expected to maintain continuous enrollment with the goal of earning degrees and/or certificates of value. Students are expected to utilize academic support services and counseling services available at their respective campuses and through community-based service providers who will work with students, providing case

management. If a student needs a leave from his or her academic program, such a leave would be considered temporary, and all efforts will be made to get the student to re-enroll, perhaps in a different academic program, or at another institution.

The clients served under this activity are not participants in the Housing Choice Voucher Program or residents of federal public housing.

Impact

In FY 2023, EOHLC continued its active involvement in the partnership with DHE, DESE, and ICHH on the Student Housing Pilot. The interagency state team met regularly throughout the year to discuss the program, its operations, and the student support provided at both the college and community level.

Enrollment began during FY 2021 and continued through January 2022. A total of 16 scholarships were awarded when recruitment ended in January 2022. There has been some attrition from the program as students pursue their evolving career goals and/or decide to leave the program for other reasons. The learning community created by the Regional Teams has had a positive impact on program design and student support.

EOHLC has increased the scholarships from \$10,000 per academic year to \$12,288 to reflect increased housing costs at the university level.

In FY 2023, 12 students received housing scholarships and 11 of those students successfully completed their second year of participation, defined as maintaining a passing grade point average and a full-time course load. All of those 11 students will be continuing their post-secondary educations. One student, who enrolled in January 2022, will continue to receive his housing stipend through January 2024.

Actual Non-Significant Changes

EOHLC updated the maximum participant term to 2 years.

Actual Changes to Metrics/Data Collection

EOHLC has updated metrics to reflect anticipated outcomes in FY 2023. Additionally, EOHLC has updated the definition of self-sufficiency to reflect completion of two years of post-secondary education.

Metrics

<i>CE #4: Increase in Resources Leveraged</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Amount of funds leveraged in dollars (increase).	\$0.00	\$125,093	\$131,075	Yes

SS #3: Increase in Positive Outcomes in Employment Status				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Enrolled in an Educational Program or Job Training	0 households	10 households	12 households	Yes
	0%	100%	100%	
<i>*This initiative is not anticipated to increase the number of households employed, as the goal of the Activity is to keep students enrolled in college. EOHLIC does not track the employment status of students in this program.</i>				
SS #5: Households Assisted by Services that Increase Self Sufficiency				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase self-sufficiency (increase).	0	10 households per year	12 households	Yes
SS #8: Households Transitioned to Self Sufficiency*				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self-sufficiency (increase).	0	10 households	11 households	Yes
<i>*Self-sufficiency is defined as completion of 2 years of post-secondary education.</i>				

Actual Significant Changes

EOHLC will not fund additional scholarships beyond the first cohort enrolled during 2021-2022. EOHLIC will work with the Interagency Team to support the current participants and to identify other possible funding streams that are more flexible and that better support the needs of the students and universities.

Challenges in Achieving Benchmarks & Possible Strategies

While enrollment began in FY 2021, residency of scholarship recipients did not start until the beginning of FY 2022. Enrollment and recruitment were active and ongoing through the Fall semester of the 2021-2022 academic year, and DHE and partner schools anticipated that all scholarships would be awarded by January 2022. These goals were not met, and because of the low enrollment levels, EOHLIC reduced the number of scholarships from 20 to 15. Twelve students in total were served over the course of FY 2023, and 11 students remain in college as of the close of FY 2023.

As reported in the FY 2022 Report, the State Teams, college staff, and State Agency partners concluded that the use of MTW funds for housing expenses created significant operational challenges for the colleges and for EOHLIC, as well as challenges for the students themselves. Frequent HQS inspections because of students moving to new living arrangements made rapid response to housing crises challenging for EOHLIC’s partners to conduct inspections on a frequent basis. During FY 2022, all parties agreed that the MTW funds were not a good fit for this program design, and that EOHLIC would not fund the scholarships moving forward. In FY 2023 the challenges encountered during the initial years of the program remained and the FY 2022 decision to separate MTW funding from the scholarship pool is still supported by the interagency working group. EOHLIC is committed to funding the existing students for the duration of their

two-year scholarships. The Pilot continues to inform program design and operations, and EOHLC looks forward to its ongoing support of this work through the end of the pilot period, in January of 2024.

Activity 2021-1: Fair Housing Initiative

Plan Year Approved, Implemented, Amended

Approved and implemented FY 2021.

Description/Update

The Fair Housing Act prohibits discrimination in the sale, rental, and financing of housing based on race, color, national origin, religion, sex, familial status, and disability. Massachusetts further prohibits discrimination on the basis of marital status, military or veteran status, sexual orientation, gender identity and expression, age, ancestry, receipt of public assistance, and age of children (under 6 years) in housing containing lead paint. Despite progress, many challenges remain, and EOHLIC regularly hears from its voucher holders and others about instances of discrimination, with the Massachusetts Commission Against Discrimination alone having received over 400 housing discrimination complaints in FY 2019.

EOHLIC is utilizing MTW Block Grant funding of up to \$500,000 per year for a three-year period. Funding was awarded through a competitive bid process in FY 2022 to a coalition of four non-profit fair housing agencies across the Commonwealth. MTW funding supports the coalition's efforts to identify fair housing compliance and enforcement issues across EOHLIC's jurisdiction, investigate discriminatory practices, and provide enforcement assistance (including through voluntary resolution efforts and litigation) for households with a housing subsidy or voucher, focusing on voucher discrimination and/or discrimination against families under the age of six in housing containing lead paint. Additionally, the funding is being used to develop best practices and education for low-income households and owners regarding fair housing including, but not limited to, advertising and outreach, as well as seminars on protected classes, fair housing rights and responsibilities, reasonable accommodations, and language assistance. The clients served under this activity may include families with housing assistance vouchers outside of the participants in EOHLIC's Housing Choice Voucher Program.

Impact

During FY 2023, the coalition served 53 households through fair housing investigation and enforcement activities. In addition, the coalition conducted numerous fair housing trainings for staff at local housing authorities and at the Regional Administering Agencies, with a total of 116 housing agency staff receiving training thus far. The coalition is working particularly closely with the SNO Mass mobility specialists at the RAAs, including doing a four-part training series on a variety of fair housing-related topics, so that SNO Mass staff have the knowledge and resources to help families address any discrimination they encounter as they search for housing in higher-opportunity neighborhoods.

Actual Non-Significant Changes

EOHLIC has made available up to \$100,000 of additional MTW funding to cover the cost of a media campaign. The campaign is intended to educate voucher recipients, housing providers, and the general public about discriminatory housing practices. Planning for the media campaign began during FY 2023, and the campaign is expected to launch during FY 2024.

Actual Changes to Metrics/Data Collection

EOHLIC updated the benchmarks to reflect the anticipated activity in FY 2023.

Metrics

<i>HC #7: Households Assisted by Services that Increase Housing Choice</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase housing choice through investigation and enforcement	0 households	60 households over a 3-year period	53	Yes
Number of households receiving services aimed to increase housing choice through education and outreach	0 households	2,667 per year*	116	No
<i>* Education and outreach will be provided to housing providers and landlords, in addition to tenant families.</i>				

Actual Significant Changes

No significant changes were made.

Challenges in Achieving Benchmarks & Possible Strategies

During FY 2023, the coalition’s education and outreach efforts were focused on housing authority and RAA staff. While planning for the media campaign began in FY 2023 (including the development of a media strategy and the design of ads), the actual launch of the campaign experienced some delays and will be kicking off in FY 2024. Once the media campaign begins in FY 2024, it is expected that a much larger number of people (including tenants and property owners) will be reached.

Activity 2021-2: Emergency Waivers

Plan Year Approved, Implemented, Amended

Approved and implemented FY 2021.

Description/Update

The economic impacts of the COVID-19 pandemic on households, businesses, and financial markets were profound. The outbreak of COVID-19 also placed additional burdens on housing authorities which worked tirelessly to respond to the needs of their participants while also maintaining compliance with program requirements. While the Coronavirus Aid, Relief and Economic Security (CARES) Act provided the U.S. Department of Housing and Urban Development (HUD) with broad authority to waive or establish alternative requirements for numerous statutory and regulatory requirements for the Public Housing program and Housing Choice Voucher (HCV) programs, there was uncertainty about the duration of this pandemic, and potentially others in the future, and the backlog of transactions, inspections, and delayed reporting requirements grew.

Accordingly, EOHLC has established an emergency waivers activity which addresses the burdens placed on all stakeholders and includes the following emergency waivers in response to economic and/or health-related emergencies and/or natural disasters, as declared by the Governor or his/her designee, including the authority to determine when to place and lift the waivers. EOHLC may revise, add, and/or remove waivers as needed to address emergency-related conditions.

1. **Delayed Reexaminations:** EOHLC may waive the requirement to conduct a reexamination of family income and composition at least annually. Currently EOHLC completes reexaminations on a biennial basis for HCV program households and on a triennial basis for HCV elderly/disabled households on fixed incomes. Where reexaminations have been delayed due to a declared emergency, EOHLC will complete the reexamination no later than the anniversary month of the year following the close of the emergency declaration. The subsequent reexamination will be scheduled on the same anniversary month using the applicable reexam frequency for the family. For example, if a biennial reexam was due on July 2020, EOHLC would complete the reexam within one year following the close of the emergency declaration. The next scheduled biennial reexam would be effective 2 years following the effective date of the first recertification after the close of the emergency declaration.
2. **Verification of Income:** During periods of declared emergencies, EOHLC will waive the requirements of the verification hierarchy but continue to use EIV.
3. **Increase in Payment Standard:** EOHLC will waive the requirement to apply the increased payment standard back to the regular effective date for delayed regular reexaminations. Instead, during periods of declared emergencies, EOHLC will apply the increased payment standard at the next interim reexamination after the effective date of the increased payment standard. If EOHLC delays a reexam, EOHLC will apply the payment standard in effect on the effective date of the delayed regular reexamination.
4. **Delayed Regular HQS Inspections:** EOHLC may waive the requirement for completion of regular HQS inspections at least biennially. Where a regular HQS inspection has been delayed, EOHLC will complete the HQS inspection no later than the anniversary month of the year following the close

of the emergency declaration. The next HQS inspection will be scheduled on the same anniversary month using the applicable inspection frequency for the unit. For example, if an HQS inspection was due by July 2020, EOHLC would complete the inspection within one year following the close of the emergency declaration. EOHLC will continue to request a self-certification from the owner that no life-threatening conditions exist in the unit as of the originally intended inspection date. Additionally, EOHLC will continue to conduct complaint inspections.

5. **Interim HQS Inspections:** EOHLC may waive the requirement to conduct re-inspections to confirm repair; however, EOHLC will require that the owner self-certify and provide documentation that a life-threatening deficiency has been corrected within 24 hours of notification and that a non-life-threatening deficiency has been corrected within 30 days of EOHLC notification.
6. **HQS QC Inspections:** EOHLC will waive the requirement to conduct HQS quality control inspections and instead may suspend HQS quality control inspections until the emergency waiver has been lifted.
7. **FSS Contract of Participation:** EOHLC will waive the requirement regarding the maximum extension of an FSS Contract of Participation (COP). During periods of declared emergency, EOHLC may extend a family’s COP, using the declared emergency as good cause of the need for extension. For households who were already in the two-year extension period when the emergency was declared, EOHLC may extend their COP beyond the two-year extension threshold.

Impact

The Governor of Massachusetts lifted the COVID-19 related state of emergency on June 15, 2021. Accordingly, EOHLC discontinued application of these emergency waivers and is addressing completion of any outstanding recertifications and inspections. The Emergency Waivers activity will be reactivated when and if economic and/or health related emergencies are declared in FY 2024 and beyond.

Actual Non-Significant Changes

No non-significant changes were made.

Actual Changes to Metrics/Data Collection

As EOHLC did not anticipate another state of emergency would be declared in FY 2023, the metrics have been updated accordingly.

Metrics

<i>HC #4: Displacement Prevention</i>				
Unit of Measurement	Baseline	Benchmark*	Outcome	Benchmark Achieved?
Number of households at or below 80% of AMI that would lose assistance or need to move.	0	0	0	Yes
<i>*The benchmark represents the number of assisted households during the period of declared emergencies who are effectively protected from displacement.</i>				

Actual Significant Changes

No significant changes were made.

Challenges in Achieving Benchmarks & Possible Strategies

Not applicable.

Activity 2023-1: Housing Navigator Initiative

Plan Year Approved, Implemented, Amended

Approved FY 2023 and implemented FY 2023.

Description/Update

EOHLC executed a three-year, \$1 million per year contract with the nonprofit Housing Navigator Massachusetts, which commenced in January of 2023. Housing Navigator's objective is to simplify the process of finding and applying for affordable housing by collecting and providing online information on 100% of the affordable rental housing available to the public in Massachusetts. The organization has developed a database and technology that promotes housing equity and collects data that brings transparency to the affordable housing market.

Nearly a half-million Massachusetts households are burdened by rents that exceed 30% of their household income, according to 2021 ACS Five-Year Estimates. Nearly 80% of those rent-burdened households are paying rents that exceed 35% of their income. Housing Navigator is working to ease the burden by bridging the digital divide to help ensure that the Commonwealth's most vulnerable residents have an easier time accessing affordable housing opportunities. Further, EOHLC has mandated Navigator participation for the approximately 2,000 newly developed affordable units it funds annually, which will ensure that the housing data will continue to be an up-to-date resource. Housing Navigator's listings provide critical, timely information on eligibility, waitlists, lotteries, and other pertinent data in user-friendly language.

Housing Navigator has implemented a regular cycle of user engagement, including surveys and focus groups of renters, service providers, and owners to solicit user feedback and research to inform adaptations to existing features of the tool and the organization's road map for future updates.

During FY 2023, Housing Navigator successfully implemented a pilot of its Short Waitlist feature, which highlights units with less than a six-month wait. When surveyed, 81% of renters reported a 9 or 10 on a scale of 1-10 in terms of satisfaction with the feature. Housing Navigator is now continuing a build-out of a permanent version of the feature.

"I've had recent success with the first-come, first-serve and Short Waitlist feature," a housing search specialist reported to Housing Navigator. "Two clients were able to lease up with their Section 8 vouchers within days."

In addition to Short Waitlists, EOHLC and Housing Navigator collaborated on the following priorities for continued improvement of the search tool.

- Increasing the overall level of detail for units accessible to persons with disabilities through property-owner outreach and the creation of a data system containing information that EOHLC currently collects from architects,
- Simplifying the input tool to reduce the amount of time it takes property owners (particularly first-time users) to enter information into the tool,
- Easing difficulty for users who are searching for housing with a mobile voucher, and

- Prototyping a system for the submission of online rental applications.

Clients served under this activity are low-income families including Housing Choice Voucher participants. This local, non-traditional activity falls under the Service Provision category as defined in HUD PIH Notice 2011-45 and conforms to the General Parameters detailed in Part 5A of the notice.

Impact

In FY 2023, a total of 251,287 users accessed the Housing Navigator website, effectively quadrupling its monthly users from approximately 6,400 in January of 2022 to approximately 31,000 in June of 2023 (note: users who visit the site multiple times may be counted more than once). On average, a user starts a search on Housing Navigator every minute, with one of the busiest times of day being from 6 a.m. to 8 a.m., according to Housing Navigator data.

There are more than 3,000 properties listed in the tool, which represents an increase of 20% over the past year. Feedback has been overwhelmingly positive.

“Because current waitlists are so long, I am constantly referring [people] to Housing Navigator for more immediate assistance. I describe it as ‘the Google for affordable housing in Massachusetts,’ which seems to really help [renters] understand what it is and why it’s such a powerful tool,” noted a Beverly, MA-based service provider.

Actual Non-Significant Changes

No non-significant changes were made during FY 2023.

Actual Changes to Metrics/Data Collection

Metrics were established in the FY 2023 plan to reflect anticipated outcomes in FY 2023.

Metrics

<i>HC #7: Households Assisted by Services that Increase Housing Choice</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase housing choice	3,800	4,000	251,287	Yes

Actual Significant Changes

Not applicable.

Challenges in Achieving Benchmarks & Possible Strategies

Not applicable.

B. Not Yet Implemented Activities

Activity 2011-1: Value Vouchers

Description/Update

EOHLC plans to implement a new “MTW value voucher” targeted to the homeless and those with disabilities. This initiative will provide a lower cost subsidy than a conventional voucher. Participants will be offered units in privately assisted housing developments where the rental costs are lower (generally by 25% or more) than current HUD published FMRs, but still not affordable to very low and extremely low-income households. These would generally be units in LIHTC, Section 236, and certain state-funded developments, for example, where rents are generally set at or below 60% of AMI.

Timetable for Implementation

This activity was approved by HUD in 2011; however, EOHLC has not utilized this flexibility to date, in part due to questions about owner interest and the impact of layering subsidies. EOHLC plans to officially close out this activity in the FY 2024 MTW Report but will continue to explore ways of addressing affordability gaps.

Explanation of Non-Significant Changes Since Approval

No changes have been made since approval.

C. Activities on Hold

There are no activities currently on hold.

D. Closed Out Activities

The following table summarizes previously approved MTW activities that EOHLC has completed, discontinued, or determined do not require MTW authority to implement.

Table 11: Closed-Out MTW Activities

Activity	Plan Year Approved	Plan Year Implemented	Close Out Year	Reason for Close Out
Biennial Inspections (Activity 2011-3)	FY 2011	FY 2013	FY 2015	EOHLC closed out this activity as an MTW initiative due to the 2014 Appropriations Act, which allows EOHLC to transition to a biennial inspection schedule without MTW authority.
Project Based Voucher Discretionary Moves (Activity 2012-3)	FY 2012	FY 2012	FY 2018	EOHLC proposed and received HUD approval for a new Local Project-Based Voucher Program, which includes revisions to the PBV opt out policy.
Rent Reasonableness (Activity 2013-1)	FY 2013	FY 2013	FY 2018 Note: The FY 2019 Plan included this activity; however, prior to the end of FY 2018 (after the FY 2019 Plan was submitted) EOHLC closed this activity.	Under HOTMA, the trigger for reasonable rent redeterminations increased from a 5% decrease to a 10% decrease in FMR from one year to the next. EOHLC determined that a 10% decrease in FMR was such that a reasonable rent redetermination would be warranted to ensure that subsidies paid are in line with market rents.
PBV Rent Reasonableness (Activity 2013-2)	FY 2013	FY 2013	FY 2019	EOHLC closed out this activity and consolidated it with the approved Enhanced PBV Program activity (Activity 2018-7). This action will allow EOHLC to report on all Enhanced PB activity features under one activity.
Equity Builder Program (Activity 2018-8)	FY 2018	Never Implemented	FY 2020	After discussions with for-profit and non-profit owners, EOHLC determined the activity was not financially feasible. Owners relayed lack of interest in pursuing the program and a lack of financial benefits. As the success of the program is dependent on owners providing LTO units, EOHLC decided to close the activity out.

Activity	Plan Year Approved	Plan Year Implemented	Close Out Year	Reason for Close Out
Health Starts at Home (2018-6)	FY 2018	FY 2018	FY 2020	The Health Starts at Home (HSH) activity was a planned three-year initiative implemented in FY 2018; the study has ended. HSH households are permitted to retain their voucher; however, EOHLC no longer issues new HSH vouchers.

V. Application of MTW Funds

A. Financial Reporting

i. Available MTW Funds in the Plan Year

EOHLC will submit all required FY 2023 unaudited and audited information in the prescribed Financial Data Schedule (FDS) format through the Financial Assessment System – PHA (FASPHA), or its successor system within the required time frame.

ii. Expenditures of MTW Funds in the Plan Year

EOHLC will submit all required FY 2023 unaudited and audited information in the prescribed Financial Data Schedule (FDS) format through the Financial Assessment System – PHA (FASPHA), or its successor system within the required time frame.

iii. Describe Application of MTW Funding Flexibility

Under the MTW Program, EOHLC is authorized to establish an MTW Block Grant budget. Activities that utilized Block Grant single fund flexibility in FY 2023 are described below.

- In FY 2023, EOHLC utilized Single Fund Flexibility to fund MTW program evaluations. Specifically, in FY 2023, EOHLC used third-party evaluators to continue program evaluations of three MTW programs: Launch, SNO Mass, and ABL. The Forum for Youth Investment completed their evaluation of the Launch initiative in spring 2023. In June 2023, Mobility Works completed a study of SNO Mass participants' experiences after moving to a SNO Mass Opportunity Area. The ABL evaluation is being conducted by MDRC and is expected to be completed during FY 2024.
- EOHLC utilized Single Fund Flexibility to continue supporting three employment-focused partnerships: MassHire Career Partnership, Generating Economic Mobility, and Credentials to Careers. These partnerships provided direct employment services to 440 households. As discussed in Activity 2012-5, these services included career planning, access to training funds, flexible funds to address financial barriers, and access to employment placement and support. These programs serve all MTW-supported households and are not restricted to FSS participants only.
 - Through the MassHire Career Partnership (MCP) and Generating Economic Mobility (GEM) initiatives, EOHLC supports the cost of hiring Career Navigators at Career Centers in four regions and (in the case of GEM) at a Metro Boston non-profit affiliated with a Career Center. Navigators meet one-on-one with individuals to help them identify a career path that fits with the available jobs in their region with good wages, benefits, and opportunity for advancement. Navigators also work with participants to identify training or education opportunities, facilitate employer relationships, and support participants through the process of finding a job and post-employment transition. Individuals are referred to Navigators by FSS Coordinators and by program staff at the RAAs. Given the Career Centers' specialized expertise in career navigation/job development and strong employer relationships, they are best suited to support HCV participants in this aspect of self-sufficiency development. Additionally, funds support the development of resources,

such as region-specific recruitment and outreach materials, access to training opportunities, and technology.

- Credentials to Careers (C2C) participants attended a 12-week intensive career and education planning workshop series and will receive twelve months of follow-up coaching and support. Sixty participants enrolled and completed C2C workshops in FY 2023. The average wage for participants who found employment after C2C was \$22.00 per hour.
- The following participant story highlights the impact of EOHLC’s partnership with local Career Centers: GG started work with her Career Navigator feeling discouraged. Her past work experience was primarily low wage and intermittent, and she had struggled to hold jobs for long periods of time. Working together, GG and her coach set short- and long-term goals to help her regain her confidence and focus, and with her coach’s help she re-entered the workforce as a cashier at CVS, where she had long wanted to work because of the career growth opportunities. Her strategic focus paid off and she was able to enroll in their Pharmacy Technician Training program. She is currently working towards becoming a Pharmacy Tech Supervisor, a position with increased responsibilities and higher wages.
- **Other Supportive Services:** In FY 2023, EOHLC utilized Single Fund Flexibility on activities to support a wide range of services and supports related to economic mobility for EOHLC program participants including: expansion of FSS programming; gap funding to support FSS staff positions not funded by the HUD FSS Coordinator funds; and the indirect costs of all FSS staff at the RAAs. The FSS Homeownership track supports FSS participants working towards homeownership with focused high-quality homebuyer education in addition to the traditional FSS support with accessing job training/post-secondary education and other resources. This work is explained in more detail in Activity 2012-5. Additionally, Single Fund Flexibility was employed to support a series of technical assistance and training workshops for FSS and other EOHLC-supported staff members to provide training ranging from understanding student loan forgiveness options to coaching strategies for high barrier participants.

The following activities were included as planned potential uses of funds under Single Fund Flexibility in the FY 2023 Plan; however, funds were not utilized for these activities during FY 2023 as these initiatives have been closed out and/or no longer utilize MTW funding:

- **Housing Innovation Specialists:** In prior plans, EOHLC proposed using Single Fund Flexibility to fund Housing Innovation Specialist positions to expedite issuance, inspection, and leasing processes for special populations or voucher holders in specific EOHLC programs (e.g., Emergency Housing Vouchers, SNO Mass). EOHLC anticipated that, if adopted, approximately \$950,000 would be spent to fund the staffing positions and provide housing-related services. We continue to explore funding housing search specialists but could likely use administrative fees and might not need to use Single Fund Flexibility to fund this effort.

B. Local Asset Management Plan

i. ***Did the MTW PHA allocate costs within statute in the Plan Year?***

Yes

ii. Did the MTW PHA implement a local asset management plan (LAMP) in the Plan Year?

No

iii. Did the MTW PHA provide a LAMP in the appendix?

No

iv. If the MTW PHA has provided a LAMP in the appendix, please provide a brief update on implementation of the LAMP. Please provide any actual changes (which must be detailed in an approved Annual MTW Plan/Plan amendment) or state that the MTW PHA did not make any changes in the Plan Year.

Not applicable

VI. Administrative

A. Reviews, Audits, and Inspections

EOHLC did not have any HUD reviews, audits or physical inspection issues that required the Agency to take action during FY 2023.

B. Evaluation Results

EOHLC has contracted with third-party evaluators (The Forum for Youth Investment, Mobility Works, and MDRC) to perform evaluations of the Launch, SNO Mass, and ABL programs, respectively.

- The Forum for Youth Investment’s evaluation of Launch (Phase “2.0”) was completed in FY 2023. The Forum gathered valuable feedback about the program from staff and participants, and their final analysis included the following findings:
 - A total of 220 young people (average age of 20) participated in Launch.
 - Of those, 50 percent identified as Hispanic/Latino and 42 percent identified as non-Hispanic Black or African American.
 - On average, participants interacted with their coach 1.5 times per week.
 - Of the 192 clients that set a goal, 87 of them (45 percent) completed at least one of their goals.
 - Among the small subset of clients (N=19) who provided wage information both at enrollment and upon obtaining a job during Launch, the average wage increased from \$13.77/hour at enrollment to \$18.80/hour after Launch, and this increase in wages was statistically significant ($p < .05$).
 - Goal completion rates varied by the frequency of client interactions in an average week. Not surprisingly, clients with the highest levels of weekly interactions with their coach (i.e., more than 2 interactions per week, on average) were the most likely to complete goals, with 70 percent of these clients completing at least one goal. This compares to 55 percent of clients with medium levels of weekly interactions (i.e. 1-2 interactions per week) and only 32 percent of clients with low levels of weekly interactions (i.e., 1 or fewer interactions per week). The difference between groups was statistically significant ($p < .001$).
 - Among Launch participants who completed a survey, 85 percent agreed or strongly agreed that Launch helped them to figure out the right goals to pursue, be more intentional about making plans, and connect to mentors for support.
- During FY 2023, a team from Mobility Works/PRRAC (Poverty and Race Research Action Council) completed a report about the experiences of SNO Mass participants and their families after moving to a high-opportunity neighborhood. The report found that most families are highly satisfied with their new community. In particular, families described improvements in their quality of life resulting from safer, quieter streets and supportive, resource-rich schools. For example,

one parent talked proudly about her child being on the honor roll and being more social at his new school after struggling academically and feeling unsafe in their prior neighborhood. Other participants talked about how their children were spending more time playing outside in their new community and about how they (the parents) were much less stressed about their children's safety.

- MDRC's evaluation of ABL is ongoing and will be completed in FY 2024. In FY 2023, MDRC and EOHLC worked together to develop a quarterly data collection strategy and template to capture certain data points not available in ABL's online tracking tool. MDRC and EOHLC also collaborated with Edgemere Consulting to update the online tracking tool to reflect the program's policy changes and to make other improvements. In the spring of 2023, MDRC analyzed recent program data and then shared the findings with housing authority staff and EOHLC staff during a virtual cross-site convening. Some of the key findings included upward trends in participants' engagement with their coach and in employment levels. However, when compared with a similar group of tenants (those with an HCV voucher from the housing authority and not enrolled in ABL), the employment trends and earnings trends over time were not significantly different. In the fall of 2023, MDRC will be conducting another round of interviews with ABL staff and participants.

C. MTW Statutory Requirement Certification

EOHLC certifies that, in FY 2023, it continued to meet the three statutory objectives of the MTW program. Appendix B includes the certification required by HUD.

D. MTW Energy Performance Contract (EPC) Flexibility Data

Not applicable.

VII. Appendix A: Listing of Regional Administering Agencies

Berkshire Housing Development Corp.

One Fenn Street Pittsfield, MA 01201
413.499.4887

Community Teamwork, Inc.

155 Merrimack Street Lowell, MA 01852
978.459.0551

Housing Assistance Corp

460 West Main Street Hyannis, MA 02601
508.771.5400

NeighborWorks Housing Solutions

169 Summer Street Kingston, MA 02364
781.422.4200

Lynn Housing Authority & Neighborhood Development

10 Church Street Lynn, MA 01902
781.592.1966

Metro Housing|Boston

1411 Tremont Street Boston, MA 02120
617.859.0400

RCAP Solutions

191 May Street Worcester, MA 01602
800.488.1969

South Middlesex Opportunity Council

7 Bishop Street Framingham, MA 01702
508.620.2336

Way Finders

1780 Main Street Springfield, MA 01103
413.233.1500

VIII. Appendix B: MTW Certification of Statutory Compliance

The Massachusetts Executive Office of Housing and Livable Communities (EOHLC) hereby certifies that between the period of July 1, 2022 and June 30, 2023, EOHLC met the following three statutory requirements of:

1. Assuring that at least 75% of the families assisted by DHCD are very low-income;
2. Continuing to assist substantially the same total number of eligible low-income families as would have been served had the amounts not been combined; and
3. Maintaining a comparable mix of families (by family size) served as would have been served had the amounts not been used under the demonstration.

MA Executive Office of Housing and Livable Communities

MA901

PHA Name

PHA Number/HA Code

I hereby certify that all the information stated herein is true and accurate:

Jennifer D. Maddox

Deputy Secretary

Name of Authorized Official

Title



September 28, 2023

Signature

Date