

PHILADELPHIA HOUSING AUTHORITY



MOVING TO WORK ANNUAL REPORT

**PHA FISCAL YEAR 2022
APRIL 1, 2021 - MARCH 31, 2022**

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I. INTRODUCTION

The Moving to Work Annual Report provides information on activities undertaken by the Philadelphia Housing Authority (PHA) under the Moving to Work Demonstration Program (MTW) during Fiscal Year 2022, i.e., the period from April 1, 2021 to March 31, 2022. The format and required content of the Report are defined by the U.S. Department of Housing and Urban Development (HUD) in the applicable version of HUD Form 50900.

PHA has been an MTW agency since April 2001. The MTW Agreement as amended, which has a term that extends through 2028, describes the authorities granted to PHA under MTW and the requirements for participation. MTW is a demonstration program authorized by Congress, through which PHA and other participating agencies are given the flexibility to waive certain statutes and HUD 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.

The MTW Agreement allows PHA to combine its three (3) primary HUD funding sources (Public Housing Operating Fund, Capital Fund and Housing Assistance Payments) into a single MTW Block Grant that can be used flexibly and interchangeably for any MTW authorized purpose.

A. MTW Long-Term Goals and Objectives

The flexibility afforded to PHA by its MTW designation has a positive and consequential impact on virtually every area of PHA policy and operations. PHA's MTW status has helped to build and sustain innovative partnerships and leverage substantial additional funds in support of PHA and the City of Philadelphia's neighborhood revitalization and housing preservation efforts citywide and, coupled with CARES Act waivers and funding provided by HUD, has been instrumental in allowing PHA to flexibly and expeditiously modify its policies and procedures in response to the COVID-19 pandemic.

PHA's housing preservation and neighborhood revitalization efforts support the goals established in the Assessment of Fair Housing (AFH) Plan jointly issued by the City and PHA and accepted by HUD in February 2017. These goals emphasize the importance of a balanced approach to fair housing including preservation of existing housing, development of new affordable rental and homeownership housing, investments to improve the quality of life in distressed neighborhoods, and mobility initiatives to support housing in high opportunity areas. In FY 2022, PHA and the

City collaborated on a public survey and other community engagement activities with the goal of updating the AFH Plan in FY 2023.

PHA views the use of MTW funding and regulatory flexibility as an essential component to implement the long-term goals and objectives detailed in the Board-approved Strategic Directions Plan. The Strategic Directions Plan, which was described in more detail in the FY 2015 MTW Annual Plan, identifies twelve (12) strategic priority areas that continued to guide PHA's major initiatives and resource allocation decisions in FY 2022:

1. Improve, preserve and expand the supply of affordable housing available to Philadelphia's residents with low-incomes
2. Achieve excellence in the provision of management and maintenance services to PHA residents
3. Create safe communities in collaboration with neighborhood residents and law enforcement agencies
4. Enhance resident well-being and independence through partnerships for employment, job training, education, health and other evidence-based supportive services
5. Improve access to quality housing choices and opportunity neighborhoods through the Housing Choice Voucher program
6. Incorporate energy conservation measures and sustainable practices throughout PHA operations
7. Improve customer service, streamline operations and create a business model that is data-driven and high performing
8. Conduct PHA business in an open and transparent manner that promotes accountability and access, ensures diversity and adheres to the highest ethical standards
9. Strengthen existing relationships and forge new public, private and philanthropic partnerships to support PHA's strategic goals
10. Make PHA an employer of choice with an accountable, diverse, trained and productive workforce
11. Ensure that PHA is a good neighbor and reliable community partner
12. Encourage innovation and promote PHA's financial health through ongoing participation in the Moving to Work Program

B. MTW Initiatives and Accomplishments

Throughout the past year, PHA continued a productive collaboration with the City of Philadelphia, a diverse and broad array of neighborhood partners and other stakeholders to increase the supply of affordable housing, preserve existing affordable units, and revitalize and transform neighborhoods in and around distressed public housing developments. PHA continued to implement a comprehensive set of initiatives that began in FY 2021 to protect the health and safety of residents, staff and the general public, and to continue serving residents during the COVID-19 pandemic. These initiatives continued over the course of FY 2022, and included vaccination drives, expanding internet access and connecting residents to rent relief programs.

The activities summarized below involve the use of MTW funding and/or programmatic flexibility. PHA's development and neighborhood revitalization initiatives leverage MTW Block Grant funds to secure private equity, City, State and/or other non-PHA funds.

Sharswood/Blumberg

The Choice Neighborhoods Transformation Plan for Sharswood/Blumberg is the largest mixed-income, mixed-use redevelopment project underway in the City of Philadelphia. Funded in part by a \$30 million HUD Choice Neighborhoods Implementation grant, the Plan calls for the development of over 1,200 units of mixed-income housing, including affordable rental and homeownership units.

A total of 364 housing units have been substantially completed and an additional 361 are currently under construction. By April 2023, PHA anticipates that all of the planned rental housing and a majority of planned homeownership units will be completed or under construction, including the \$53 million mixed-use housing and retail complex undertaken by Mosaic Development, which will include a Grocery Outlet supermarket, Santander Bank, an urgent care health center, and other commercial/retail facilities.

In addition to this housing activity and as noted in prior reports, construction and occupancy of the new PHA Headquarters Building was completed in January 2019. The Vaux Community Building has been substantially rehabilitated and is now the site of PHA's Workforce Center, a Section 3 Resource Center, a neighborhood high school operated by Big Picture Schools, a new health clinic operated by Temple University School of Public Health, a CVS Pharmacy training facility, resident business incubator and other community services.

Norris Homes/North Central Philadelphia

At North Central/Norris, PHA continued to partner with the City of Philadelphia, public housing residents and other partners to implement a Choice Neighborhood Transformation Plan in the North Central Philadelphia neighborhood. All remaining construction was completed in FY 2022. Overall, the Plan has resulted in extensive community improvements and construction of 272 affordable rental and 30 homeownership units. (The number of rental units constructed exceeded the originally planned 267 units.) The third and final rental phase by Jonathan Rose Companies began in 2020 and was completed in the fall of 2021. To celebrate this milestone, HUD Secretary, Marcia Fudge, visited the neighborhood in FY 2022. All homeownership units have been sold or are under sales agreements. PHA continues to collaborate with the City on the final grant close-

out; however, all of the substantive Transformation Plan elements envisioned by the community are now essentially complete. PHA is developing plans for additional housing units on the former public housing site. PHA also continues to serve as the People Lead Partner, including the transition and oversight of endowment-funded service activities for Norris residents.

Rental Assistance Demonstration (RAD)

The RAD program allows PHA to leverage MTW Block Grant, private and other capital sources through conversion of public housing subsidies to long-term project-based assistance. RAD is a critically important component of PHA's efforts to secure new capital resources necessary for the long-term preservation of PHA's existing multifamily public housing portfolio. RAD also supports PHA's efforts to transfer subsidies from distressed, vacant scattered site public housing units to newly developed affordable housing. As of the end of FY 2022, PHA has closed on 1,883 rental units at 28 developments sponsored by PHA and partner organizations that will serve veterans, seniors, formerly homeless families and other underserved, diverse populations while also helping to catalyze additional public and private sector investments into neighborhoods. To date, total development costs exceed \$950 million for RAD projects which have closed, including over \$453 million in private equity.

Public Housing Development

PHA is one of the few agencies nationwide to continue to develop public housing units in collaboration with well-qualified, primarily mission-driven housing partners. This activity allows PHA to tap into existing, but unused, public housing Annual Contributions Contract (ACC) authority to help spur the development of new affordable housing. In FY 2022, PHA collaborated with community partners to complete financial closings for five (5) new public housing development with a total of 182 units. Construction completion is currently projected for FY 2023 at these sites. Planning commenced for an additional six (6) new developments with 175 units that are projected to close in FY 2023.

Citywide Development

Utilizing its MTW flexibility, PHA continued to serve as a catalyst and major funder for housing and neighborhood development throughout the City, working directly through its PHADC affiliate and in partnership with a diverse group of development partners, including community-based organizations.

In FY 2022, PHA assisted nearly 4,000 housing units citywide through the Unit Based Voucher (UBV) program. Development sponsors include dozens of mission-driven and other organizations, including Liberty Resources, New Courtland, HACE, Nueva Esperanza, Womens Community Revitalization Project, Mission First Housing Group, HELP USA, Methodist Family Services, and others. In FY 2022, PHA entered into Agreements and/or Housing Assistance Payments Contracts for 298 new units, including RAD conversions, under the UBV program. UBV is increasingly a major catalyst for new affordable development in Philadelphia, as it provides long-term operating supports necessary to ensure that rents are affordable to households with incomes at or below 50% of Area Median Income.

As part of PHA's ongoing efforts to increase the availability of affordable housing units, PHA partnered with Susquehanna Net Zero Housing LP to build a 78-unit development at 27th and

Susquehanna, along with a Life Center; construction was completed and PHA began leasing at the development in FY 2022.

Planning continued during FY 2022 for the collaborative partnership with Councilmember María Quiñonez Sánchez and nonprofit affordable housing developers in the 7th District to safeguard long-term affordable housing development by transferring 240 long-term vacant lots and shells ensuring that the properties will be redeveloped for long-term affordable housing with a 20 year restrictive covenant.

Leased Housing

In FY 2022, PHA provided rental subsidies to over 19,000 low-income households consisting of families with children, seniors and people with disabilities through its local Leased Housing Program including MTW and non-MTW vouchers. Households served through PHA's Leased Housing Program include residents of UBV developments.

PHA continued to develop and implement initiatives to streamline leasing and inspections, increase owner participation, and improve customer service. In FY 2022, PHA provided a variety of financial incentives to encourage leasing of new HCV units and to retain owners currently participating in the HCV program who lease units in opportunity neighborhoods. PHA also continued to implement new systems to manage inspections and communicate with owners, which have increased transparency and reduced cycle times for the inspections and leasing processes.

Affordable Homeownership

PHA operates a broad array of first-time affordable homeownership initiatives designed to expand housing choice and increase the number of first time, low-income homebuyers. The MTW Opening Doors to Affordable Homeownership initiative, approved as part of the FY 2019 MTW Plan, consolidated PHA's existing HUD-approved Section 5h Homeownership Program, Public Housing Mobility program, Housing Choice Voucher (HCV) Homeownership Program, other new development homeownership initiatives and homeownership readiness and counseling supports under a single department. Through these initiatives, a total of 94 PHA residents and HCV participants became new homeowners over the past year. To further equitable development efforts and increase affordable homeownership opportunities for PHA families, PHA began a partnership with Jumpstart Philly and other groups in FY 2022 to support local aspiring developers and renovate 53 vacant and distressed scattered site units, which will be made available for low and moderate income families.

Resident Supportive Service Programs

PHA utilized MTW Block Grant and other partner-leveraged funds to support a wide range of workforce development, adult and youth education, financial literacy, senior service, health care and other programs and services to meet the needs of PHA residents. PHA works directly with residents through the Resident Programs and Partnerships (RPP) Division and their Workforce Center, Section 3 Resource Center and Job Bank, and will soon serve PHA youth at the Youth and Family Center, which is slated to open in FY 2023. PHA also continued to collaborate with a robust network of partners, who have demonstrated a long-standing commitment to serving PHA's residents. Through RPP staff and its dedicated partners, PHA was able to continue to meet needs which have emerged as a result of the COVID-19 pandemic, including conducting vaccine drives,

reducing food insecurity, increasing internet access, and providing financial support to ensure housing stability. Additionally, RPP and its partners continued to offer services remotely, shifting the program format to protect the health and safety of residents.

Re-Entry Initiatives

PHA continued implementation of the MTW Second Chance program, which provides supportive services and housing subsidies to formerly incarcerated returning citizens that are active participants in good standing with the Eastern District Federal Court Supervision to Aid Reentry (STAR) Program and Mayor's Office of Reintegration Services (RISE) Program. In FY 2022, PHA assisted 11 participants through the STAR program, providing them counseling, education, job training and placement services in addition to their housing subsidy. The Second Chance Initiative also involves a partnership with the Pennsylvania First Judicial Court's MENTOR program. Through these partnerships, the Second Chance Initiative helps to prevent homelessness and, hopefully, interrupt the cycle of recidivism.

Blueprint to End Homelessness Initiative

In FY 2022, PHA continued to collaborate with the City of Philadelphia Office of Supportive Housing on the Blueprint to End Homelessness Program that provides housing opportunities for formerly homeless families and individuals moving out of transitional housing. See also discussion of Emergency Housing Vouchers below.

Sponsor Based Shared Housing Pilot

In FY 2022, PHA provided housing opportunities for homeless and at-risk households in 38 units, up from an initial commitment of 25 units. PHA also entered into a new partnership with the Community College of Philadelphia (CCP) to provide housing opportunities to low-income, at-risk CCP students.

Voucher Mobility

PHA started a Housing Opportunity Program (HOP) in August 2013 to assist voucher holders in locating units and prospective property owners in opportunity neighborhoods within and outside of Philadelphia. The program provides participants with a broad range of supportive services, housing counseling, and other support for their successful transition to higher opportunity neighborhoods. As a result of the program's success, PHA elected to use MTW funding to continue the pilot program initially funded by HUD. Through the HOP program, PHA also liaises with new and potential owners whose units are located in opportunity neighborhoods. In FY 2022, HOP assisted 21 HCV participants to move to opportunity neighborhoods. PHA also implemented a series of owner incentives tailored to encourage owners to lease their units in opportunity neighborhoods to HCV participants in order to increase the supply of units available to voucher holders.

Rent Simplification

PHA continued to implement previously approved MTW initiatives that simplify program administration and provide incentives for economic self-sufficiency.

C. Non-MTW Initiatives and Accomplishments

The following are highlights of PHA's Non-MTW initiatives and accomplishments in FY 2022. Non-MTW initiatives are those activities that do not generally require the use of MTW regulatory or financial flexibility:

Small Area Fair Market Rents (SAFMR)

PHA continued to implement Small Area Fair Market Rents (SAFMRs) in the Housing Choice Voucher program, which were first implemented on Fiscal Year 2019. Use of SAFMRs allows PHA to establish multiple HCV payment subsidy standards at the zip code level, instead of utilizing single payment standards for the entire City. Adoption of SAFMRs is projected, over time, to assist HCV program participants to move from areas with high concentrations of poverty to higher opportunity areas that have better access to jobs, education, and other services. In FY 2022, PHA established exception payment standards for individual units within a SAFMR zip code and, utilizing approved MTW flexibility, removed the 120% limitation in order to encourage leasing in neighborhoods undergoing significant revitalization when the applicable SAFMRs may not reflect or keep pace with market conditions of the neighborhood.

Veterans Administration Supportive Housing (VASH)

PHA continued its partnership with the Department of Veteran's Affairs (VA) to serve veterans, through the Veterans Administration Supportive Housing Program (VASH) program. The program provides rental assistance for homeless veterans through HUD funding, and offers case management and clinical services through the VA. A total of 674 veterans were housed under the program during the year. PHA also received an allocation of 20 additional VASH vouchers from HUD in FY 2022.

Mainstream Vouchers

In FY 2022, PHA provided housing assistance to 339 non-elderly persons with disabilities with Mainstream vouchers. PHA continued its partnerships with the City of Philadelphia Office of Homeless Services and Liberty Resources to provide case management and support for Mainstream voucher holders.

Foster Youth to Independence Vouchers

PHA received 75 vouchers from HUD under this program to provide assistance for 36 months to youth under the age of 25 with a history of involvement in the child welfare system.

Emergency Housing Vouchers

In FY 2022, PHA began providing housing assistance to families experiencing or at-risk of homelessness, including those fleeing domestic violence, through HUD's new Emergency Housing Voucher (EHV) program. PHA entered into a Memorandum of Understanding (MOU) with the Philadelphia Office of Homeless Services for the Philadelphia Continuum of Care (CoC) to provide referrals, housing search and other services to the projected 863 EHV voucher holders who will be served under the program. Under the MOU, the partners commit to providing supports for EHV families to overcome barriers to leasing and increase their housing stability.

Jobs Plus at Wilson Park

In FY 2022, PHA secured a Jobs Plus grant of nearly \$3 million to help families at Wilson Park increase their earned incomes and improve economic mobility. In partnership with Philadelphia

Works (the local Workforce Investment Board) and other key partners, PHA provides on-site employment readiness services, financial literacy and rent incentives to help residents find and secure jobs.

II. GENERAL OPERATING INFORMATION

A. Housing Stock Information

PHA is the fourth largest Public Housing Authority in the United States and the largest provider of affordable housing in the City of Philadelphia. PHA serves eligible low-income households through its two (2) primary housing programs: Public Housing and the Housing Choice Voucher (HCV) program both of which are supported with MTW Block Grant funds.

Public Housing

PHA’s public housing inventory includes units for families, seniors, and persons with disabilities. These affordable apartments are located throughout the City in thirty (30) conventional public housing developments, twenty-four (24) Low Income Housing Tax Credit (LIHTC) developments managed by the Philadelphia Asset and Property Management Corporation (PAPMC), and twenty-three (23) developments operated by Alternate Management Entities (AME) under contract to PHA. Over 4,000 of PHA’s public housing units are “scattered sites,” i.e. housing units located in single family homes or small buildings of up to four (4) units. PHA operates one of the largest scattered site public housing programs in the country.

PHA’s public housing portfolio is aging and deteriorating. More than 75% of all units were built over 40 years ago and over 55% were built 60 or more years ago. PHA’s estimated \$1+ billion capital needs backlog continues to grow each year, creating enormous maintenance challenges. PHA’s RAD conversion strategy is a key element of addressing the capital backlog and ensuring the long-term preservation of affordable housing.

Table 1 below provides PHA’s actual public housing inventory as of the end of FY 2022. The public housing inventory varies from year to year as a result of public housing units being converted to long-term project-based assistance under the RAD program and other factors including development of new public housing developments.

Table 1: Public Housing Inventory

	Units as of 3/31/2022
MTW Public Housing Units	13,117

PHA is one of the few agencies nationwide to continue to develop public housing units in collaboration with well-qualified, primarily mission-driven housing partners. This activity allows PHA to tap into existing, but unused, public housing Annual Contributions Contract (ACC) authority to help spur the development of new affordable housing. As of the end of FY 2022, PHA is collaborating with partners to develop 11 new public housing developments, with a total of 357 units.

Housing Choice Voucher Program

Through its Housing Choice Voucher (HCV) program, PHA provides rental assistance to families, seniors and persons with disabilities at properties owned by private or non-profit owners. The HCV program also provides support to first time homebuyers. PHA supports HCV program participants in their efforts to find good quality housing units, including housing located in high opportunity areas, through the Housing Opportunity Program.

PHA’s voucher inventory includes MTW tenant-based vouchers, project-based vouchers supported through PHA’s Unit Based Voucher (UBV) program, as well as vouchers authorized by HUD for special purposes such as the Veterans Affairs Supportive Housing (VASH) Program, Family Unification Program, SRO for the Homeless, Moderate Rehab, Mainstream and Emergency Housing Voucher programs. The MTW voucher inventory also includes vouchers issued as a result of conversion of public housing assistance through the Rental Assistance Demonstration program. PHA partners with a wide array of mission-driven, non-profit and for-profit organizations to provide quality housing opportunities, many which provide site or neighborhood-based supportive services, through the UBV program.

HUD periodically issues Enhanced Vouchers and Tenant Protection Vouchers for PHA to administer. As allowed by the MTW Agreement, PHA incorporates Enhanced and Tenant Protection Vouchers into the MTW Block Grant when eligible.

i. Actual New Project Based Vouchers

As of March 31, 2022, PHA has entered into Agreements and/or Housing Assistance Payments Contracts for 298 new project-based voucher units under PHA’s Unit Based Leasing (UBV) program, including planned RAD conversions. Due to development financing and construction timetables, projects may appear on this list over more than one year. A list of these projects and summary descriptions is shown in Table 2 below.

Table 2: Actual New Project Based Vouchers

Property Name	# of Vouchers Newly Project-Based		Status at End of Plan Year	RAD?	Description of Project
	Planned	Actual			
27th & Susquehanna	78	0	N/A	Yes	New construction in Strawberry Mansion at 27 th & Susquehanna for low-income families sponsored by Susquehanna Net Zero Housing LP.
Fairhill Apartments Initial Phase	110	0	N/A	Yes	Partial conversion of existing public housing development sponsored by PHA.
Harlan Street	22	0	N/A	Yes	New construction in the Sharswood neighborhood sponsored by Michaels Development.
Harrison Plaza	112	112	Committed	Yes	Conversion of tower in existing public housing development sponsored by PHA.
Hunt Sharswood Phase 1	30	30	Committed	Yes	New construction, mixed income development with 60 total units developed by Hunt-Pennrose as part of Sharswood CNI Plan
Liddonfield	150	0	N/A	No	New construction for seniors in Northeast Philadelphia sponsored by New Courtland. Supportive services are provided.

Property Name	# of Vouchers Newly Project-Based		Status at End of Plan Year	RAD?	Description of Project
	Planned	Actual			
New Courtland at Henry Ave	40	0	N/A	Yes	Rehabilitation of Henry Ave tower for seniors sponsored by New Courtland. Supportive services to be provided.
Norris Apartments Phase V	45	0	N/A	Yes	Choice Neighborhood RAD conversion sponsored by PHA.
Norris LP	51	51	Leased	Yes	Conversion of existing PAPMC public housing development sponsored by PHA.
Queen Lane	55	55	Leased	Yes	Conversion of existing PAPMC development sponsored by PHA.
Queen Row	43	0	N/A	Yes	Conversion of existing public housing development sponsored by PHA.
Reynolds School	49	0	N/A	Yes	Adaptive reuse to convert elementary school into housing for homeless veterans sponsored by HELP USA. Supportive services to be provided.
School of Nursing – Project HOME	50	50	Committed	No	Rehabilitation of former nursing school building for homeless individuals sponsored by Project HOME. Supportive services to be provided.
Sharswood II	30	0	N/A	Yes	New construction in the Sharswood neighborhood sponsored by Hunt. Supportive Services to be provided.
Sharswood III	95	0	N/A	Yes	New construction in the Sharswood neighborhood sponsored by Hunt.
Strawberry Mansion Village	34	0	N/A	No	New construction in the Strawberry Mansion neighborhood sponsored by Pennrose. Supportive services to be provided.
West Park Apartments Initial Phase	110	0	N/A	Yes	Partial conversion of existing public housing development sponsored by PHA.
	1,104	298	Total Planned and Actual Vouchers Newly Project-Based		

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

The number of actual new project-based vouchers was less than planned, as developments (such as Sharswood phases and West Park) were not yet under AHAP or HAP before the end of the fiscal year. Additionally, three (3) developments (27th & Susquehanna, Norris Apartments Phase V, and Reynolds School) were placed under AHAP or HAP before the start of the fiscal year. As a result, these three (3) developments, which account for 172 project-based vouchers, have been included in Table 3: Actual Existing Project Based Vouchers.

ii. Actual Existing Project Based Vouchers

In addition to the committed projects listed in Table 2, PHA continued to provide subsidies and programmatic oversight to 3,863 existing UBV units. Table 3 provides a list of existing UBV projects and summary descriptions, including information on actual unit counts as of March 31, 2022, compared to those projected in the FY 2022 MTW Annual Plan.

Table 3: Actual Existing Project Based Vouchers

Property Name	# of Project-Based Vouchers		Status at End of Year	RAD?	Description of Project
	Planned	Actual			
1315 North 8th Street	25	25	Leased/Issued	Yes	New construction of 30 units of affordable housing targeted for youths aging out of foster care in the West Poplar neighborhood (homeless) sponsored by Project HOME. Supportive services are provided.
2415 N Broad St	88	88	Leased/Issued	Yes	New construction in North Philadelphia serving homeless individuals, sponsored by Project Home. Supportive services are provided.
27 th & Susquehanna	0	78	Leased/Issued	Yes	New construction in Strawberry Mansion at 27 th & Susquehanna for low-income families sponsored by Susquehanna Net Zero Housing LP.
4050 Apts	20	20	Leased/Issued	No	New Construction site for eligible artists in West Philadelphia sponsored by People's Emergency Center. Supportive services are provided.
46th St	4	4	Leased/Issued	No	Existing site for low-income families in South Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
4th & Diamond	32	32	Leased/Issued	No	Existing site for women and their families in North Philadelphia sponsored by Women's Community Revitalization Project. Supportive services are provided.
5317 15th St	1	0	Leased/Issued	No	Existing site for low-income families in South Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
7th & Ritner	5	0	Leased/Issued	No	Existing site for low-income families in South Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
810 Arch St	70	70	Leased/Issued	No	Existing site for Homelessness in Center City Philadelphia sponsored by Project Home. Supportive services are provided.
Academy Rd	18	18	Leased/Issued	No	Existing site for low-income families in Roxborough section of Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
Anna's House	12	12	Leased/Issued	No	Existing site for homeless/mental health individuals in South Philadelphia sponsored by CATCH. Supportive services are provided.
Arch V Temple	49	49	Leased/Issued	No	Existing site for very low-income families in North Philadelphia sponsored by Mission First Housing Group.
Arch VI Temple	40	40	Leased/Issued	No	Existing site for very low-income families in North Philadelphia sponsored by Mission First Housing Group.
Arch VII LIH Walnut	14	14	Leased/Issued	No	Existing site for very low-income families in West Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
Art Apartments	30	30	Leased/Issued	No	Existing site for very low-income families in West Philadelphia sponsored by Pine Lake Management Associates, LP.
Ascension Manor	3	3	Leased/Issued	No	Existing site for low-income seniors in North Philadelphia sponsored by Liberty Resources. Supportive services are provided.
Belmont I	25	25	Leased/Issued	No	New Construction site for the disabled in West Philadelphia sponsored by Inglis House. Supportive services are provided.
Belmont II	15	15	Leased/Issued	No	New Construction site for the disabled in West Philadelphia sponsored by Inglis House. Supportive services are provided.

Property Name	# of Project-Based Vouchers		Status at End of Year	RAD?	Description of Project
	Planned	Actual			
Benner/Frankford	8	8	Leased/Issued	No	Existing site for low-income families in South Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
Bernice Elza	6	6	Leased/Issued	No	Existing site for homeless emancipated teens in West Philadelphia sponsored by Peoples Emergency Center. Supportive services are provided.
Bethesda Project Bainbridge	20	20	Leased/Issued	No	Existing site for homeless/mental health individuals in South Philadelphia sponsored by Bethesda Project. Supportive services are provided.
Bethesda Project South	4	4	Leased/Issued	No	Existing site for homeless/mental health individuals in South Philadelphia sponsored by Bethesda Project. Supportive services are provided.
Bethesda Project Spruce	13	13	Leased/Issued	No	Existing site for homeless/mental health individuals in South Philadelphia sponsored by Bethesda Project. Supportive services are provided.
Bigham Place	7	7	Leased/Issued	No	Existing site for Homeless families in Mantua sponsored by People's Emergency Center. Supportive services are provided.
Blakiston St	7	7	Leased/Issued	No	Existing site for low-income families in Northeast Philadelphia sponsored by Mission First Housing Group.
Blumberg	6	6	Leased/Issued	No	New Construction for low-income families in North Phila sponsored by Philadelphia Housing Authority.
Blumberg 83 Phase III	83	83	Leased/Issued	Yes	New construction in Blumberg/Sharswood neighborhood serving low-income families sponsored by PHA.
Blumberg Phase I	51	51	Leased/Issued	Yes	New construction in Sharswood neighborhood serving low-income families including 51 RAD and 6 other project-based vouchers sponsored by PHA.
Blumberg Phase I	6	6	Leased/Issued	No	New construction in Sharswood neighborhood serving low-income families including 51 RAD and 6 other project-based vouchers sponsored by PHA.
Blumberg Senior	94	94	Leased/Issued	Yes	New construction of an existing site for seniors sponsored by PHA. Supportive services are provided.
Boriquen	17	17	Leased/Issued	No	Existing site for very low-income families in North Philadelphia sponsored by Boriquen Associates II Limited. Supportive services are provided.
Brentwood Parkside	22	22	Leased/Issued	No	Existing site for very low-income seniors and families in West Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
Cantrell Place	40	40	Leased/Issued	Yes	Substantial rehabilitation development in South Philadelphia for seniors, sponsored by Presbys Inspired Life. Supportive services are provided.
Casas En La Plaza	29	29	Leased/Issued	Yes	Rehabilitation of existing family units in North Central Philadelphia, sponsored by Norris Square Community Alliance.
Centennial Village	23	23	Leased/Issued	No	New Construction for low-income families, seniors, disabled in West Philadelphia sponsored by Community Ventures. Supportive services are provided.
Chatham Court Apts	18	18	Leased/Issued	No	Existing site for low-income families in West Philadelphia sponsored by Ingerman. Supportive services are provided.
Chestnut St	6	6	Leased/Issued	No	Existing site for low-income families in the West Philadelphia sponsored by Mission First Housing Group.

Property Name	# of Project-Based Vouchers		Status at End of Year	RAD?	Description of Project
	Planned	Actual			
Cloisters III	18	18	Leased/Issued	No	Existing site for homeless individuals in West Philadelphia sponsored by Cloisters III Housing Partnership. Supportive services are provided.
CNI Norris/North Central Phase III	28	28	Leased/Issued	Yes	New construction replacement of existing family public housing site sponsored by PHA.
Conklin St	3	3	Leased/Issued	No	Existing site for low-income families in Northeast Philadelphia sponsored by Mission First Housing Group.
Courtyard at Riverview	470	470	Leased/Issued	Yes	Rehabilitation of existing housing serving low-income families and seniors, sponsored by Michaels Organization.
Dignity Boss	8	8	Leased/Issued	No	Existing site for women of domestic abuse with children in Germantown/Mt Airy sponsored by Community For Dignity & Fairness. Supportive services are provided.
Dignity Nedro	4	4	Leased/Issued	No	Existing site for women of domestic abuse with children in Northwest Philadelphia sponsored by Community For Dignity & Fairness. Supportive services are provided.
Dignity-1	10	10	Leased/Issued	No	Existing site for women of domestic abuse with children in Germantown, sponsored by Community For Dignity & Fairness Supportive services are provided.
Dignity-15	4	4	Leased/Issued	No	Existing site for women of domestic abuse with children in Germantown, sponsored by Community For Dignity & Fairness. Supportive services are provided.
Dignity-21	11	11	Leased/Issued	No	Existing site for women of domestic abuse with children in Germantown, sponsored by Community For Dignity & Fairness. Supportive services are provided.
Dignity-33	16	16	Leased/Issued	No	Existing site for women of domestic abuse with children in Germantown, sponsored by Community For Dignity & Fairness. Supportive services are provided.
Dignity-4	3	3	Leased/Issued	No	Existing site for women of domestic abuse with children in Germantown, sponsored by Community For Dignity & Fairness. Supportive services are provided.
Ditman St	10	10	Leased/Issued	No	Existing site for low-income families in Northeast Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
Dunlap School	35	35	Leased/Issued	No	Existing site for seniors in North Philadelphia sponsored by Dunlap Management Partners LP. Supportive services are provided.
Edgewood Manor	33	33	Leased/Issued	No	Existing site for very low-income families in North Philadelphia sponsored by Edgewood Manor II Lap. Supportive services are provided.
Elders Place I	43	43	Leased/Issued	No	Existing senior site in the Germantown section of Philadelphia sponsored by Penn Housing LLC. Supportive services are provided.
Elders Place II	38	38	Leased/Issued	No	Existing senior site in the Germantown section of Philadelphia sponsored by Penn Housing LLC. Supportive services are provided.
Fattah Homes I	6	6	Leased/Issued	No	Existing site for homeless families with disability in West Philadelphia sponsored by Peoples Emergency Center. Supportive services are provided.

Property Name	# of Project-Based Vouchers		Status at End of Year	RAD?	Description of Project
	Planned	Actual			
Fattah Homes II	6	6	Leased/Issued	No	Existing site for Homeless families in Mantua sponsored by People's Emergency Center. Supportive services are provided.
Fourth St Access	24	24	Leased/Issued	No	Existing site for low-income families in North Philadelphia. Project sponsor is Mission First Housing Group. Supportive services are provided.
Francis House	10	10	Committed	No	New construction for seniors in Northeast Philadelphia sponsored by St Ignatius. Supportive services are provided.
Freedom Village	16	16	Leased/Issued	No	Existing site for very low-income families in North Philadelphia sponsored by Freedom Village LP.
Gaudenzia Shelton Court	19	19	Leased/Issued	No	Existing site for homeless low-income individuals in East Mt Airy, sponsored by Gaudenzia Foundation Inc. Supportive services are provided.
Gordon St	21	21	Leased/Issued	No	New construction for low-income families sponsored by Philadelphia Housing Authority.
Haddington III	48	48	Leased/Issued	Yes	New construction in West Philadelphia for low-income families, sponsored by 1260 Housing Development Corp. Supportive services are provided.
Help I	14	14	Leased/Issued	No	Existing site for veterans in West Philadelphia sponsored by HELP USA. Supportive services are provided.
Help II	50	50	Leased/Issued	No	Existing site for veterans in West Philadelphia sponsored by HELP USA. Supportive services are provided.
HELP IV	15	15	Leased/Issued	No	Existing site for veterans in West Philadelphia sponsored by HELP USA. Supportive services are provided.
HELP V	37	37	Leased/Issued	Yes	New construction in Northern Liberties section of Philadelphia serving veterans and senior veterans, sponsored by HELP USA. Supportive services are provided.
Hope Bridge Ogden	4	4	Leased/Issued	No	Existing site for homeless individuals in West Philadelphia sponsored by Methodist Family Services of Philadelphia. Supportive services are provided.
Hope Bridge Vine St	20	20	Leased/Issued	No	Existing site for homeless individuals in West Philadelphia sponsored by Methodist Family Services of Philadelphia. Supportive services are provided.
Imani Homes I	24	24	Leased/Issued	No	Existing site for homeless families in West Philadelphia sponsored by Methodist Family Services of Philadelphia. Supportive services are provided.
Imani Homes II	6	6	Leased/Issued	No	Existing site for homeless individuals in West Philadelphia sponsored by Methodist Family Services of Philadelphia. Supportive services are provided.
Imani Homes III	6	6	Leased/Issued	No	Existing site for homeless individuals in West Philadelphia sponsored by Methodist Family Services of Philadelphia. Supportive services are provided.
Imani Homes IV	8	8	Leased/Issued	No	Existing site for homeless individuals in West Philadelphia sponsored by Methodist Family Services of Philadelphia. Supportive services are provided.
Imani Homes V	11	11	Leased/Issued	No	Existing site for homeless individuals in West Philadelphia sponsored by Methodist Family Services of Philadelphia. Supportive services are provided.
Impact Veterans	8	8	Leased/Issued	No	Existing site for Veteran Families in North Philadelphia sponsored by Impact Services. Supportive services are provided.
INB Mascher	12	12	Leased/Issued	No	Existing site for women and their families in North Philadelphia sponsored by Women's Community

Property Name	# of Project-Based Vouchers		Status at End of Year	RAD?	Description of Project
	Planned	Actual			
					Revitalization Project. Supportive services are provided.
Inglis House	17	17	Leased/Issued	No	Existing site for the disabled sponsored by Inglis House. Supportive services are provided.
Inglis House-Elmwood	40	40	Leased/Issued	No	Existing site for the disabled sponsored by Inglis House. Supportive services are provided.
Jackson St	2	2	Leased/Issued	No	Existing site for low-income families in the West Philadelphia sponsored by Mission First Housing Group.
Jannie's Place	17	17	Leased/Issued	No	Existing site for homeless individuals and families in the Mantua neighborhood of West Philadelphia sponsored by People's Emergency Center. Supportive services are provided.
JBH Homes	15	15	Leased/Issued	No	Existing site for homeless with special needs in the Fairmount area of Philadelphia sponsored by Project Home. Supportive services are provided.
Kate's Place	35	35	Leased/Issued	No	Existing site for singles and people with disabilities in the Center City area of Philadelphia sponsored by Peoples Emergency Center. Supportive services are provided.
Kendrick/Gillespie St	11	11	Leased/Issued	No	Existing site for low-income families in Holmesburg section of Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
Keystone St	6	6	Leased/Issued	No	Existing site for families in Northeast Philadelphia sponsored by Mission First Housing Group.
Larchwood St	4	4	Leased/Issued	No	Existing site for low-income families in Spruce Hill section of Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
Lehigh Park I	49	49	Leased/Issued	Yes	Rehabilitation of existing housing serving low-income families, sponsored by HACE. Supportive services are provided.
Lehigh Park II	25	25	Leased/Issued	No	Existing site for families, elderly or disabled sponsored by HACE. Supportive services are provided.
Liberty at Disston	5	5	Leased/Issued	No	Nursing home transition in Northeast Philadelphia sponsored by Liberty Resources. Supportive services are provided.
Liberty Resource	2	2	Leased/Issued	No	Existing site with a preference for disabled seniors in West Philadelphia sponsored by Liberty Resources.
Liberty Welsh	2	2	Leased/Issued	No	Nursing home transition in Northeast Philadelphia sponsored by Liberty Resources. Supportive services are provided.
Lindley Court	11	11	Leased/Issued	No	Rehabilitation site in Logan for seniors sponsored by Presby Inspired Life. Supportive services are provided.
Los Balcones	21	21	Leased/Issued	No	Existing site for low-income women and families in North Philadelphia sponsored by Norris Square Association.
Martin St	7	7	Leased/Issued	No	Existing site for low-income families in Northeast Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
Monument Mews	60	60	Leased/Issued	No	Existing site for very low-income families in West Philadelphia sponsored by Mission First Housing Group.
Monument Village	11	11	Leased/Issued	No	Existing site for single women in West Philadelphia sponsored by Methodist Homes. Supportive services are provided.

Property Name	# of Project-Based Vouchers		Status at End of Year	RAD?	Description of Project
	Planned	Actual			
Morton St	2	2	Leased/Issued	No	Existing site for low-income families in Germantown Philadelphia sponsored by Mission First Housing Group.
MPB School Apartments	16	16	Leased/Issued	No	Existing site for very low-income families in North Philadelphia sponsored by Mission First Housing Group.
Mt Vernon II	15	15	Leased/Issued	No	Existing site for very low-income families in West Philadelphia sponsored by Mt Vernon LP.
Mt. Vernon I	15	15	Leased/Issued	No	Existing site for very low-income families in West Philadelphia sponsored by Mt Vernon LP.
New Courtland at Allegheny	40	40	Leased/Issued	No	Existing site for low-income seniors in North Philadelphia sponsored by New Courtland. Supportive services are provided.
New Courtland at Cliveden	32	32	Leased/Issued	No	Existing site for low-income seniors in Germantown sponsored by New Courtland. Supportive services are provided.
New Courtland at St Barts	42	42	Leased/Issued	Yes	New construction in Northeast Philadelphia for seniors, sponsored by New Courtland. Supportive services are provided.
Norris Apartments Phase V	0	45	Leased/Issued	Yes	Choice Neighborhood RAD conversion sponsored by PHA.
Norris CNI Phase II	74	74	Leased/Issued	Yes	New construction family public housing replacement units sponsored by PHA.
NPCH - Community Building	16	16	Leased/Issued	No	Existing site for very low-income families in North Philadelphia sponsored by NPCH Associates.
Oakdale St	12	12	Leased/Issued	No	New construction site for low-income families sponsored by Philadelphia Housing Authority.
Osage Ave	2	2	Leased/Issued	No	Existing site for low-income families in Northeast Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
Parkside 10	41	41	Leased/Issued	No	Existing site for very low-income families in West Philadelphia sponsored by Mission First Housing Group.
Parkside 11	8	8	Leased/Issued	No	Existing site for very low-income families in West Philadelphia sponsored by Mission First Housing Group.
Paseo Verde	19	19	Leased/Issued	No	Existing site for very low-income families in North Philadelphia sponsored by Transit Village Affordable Housing LP.
Patriot House	15	15	Leased/Issued	No	Existing site for homeless individuals in South Philadelphia sponsored by CATCH. Supportive services are provided.
Penrose	10	10	Leased/Issued	No	Existing site for homeless individuals in South Philadelphia sponsored by CATCH. Supportive services are provided.
Plymouth Hall	53	53	Leased/Issued	Yes	Existing site for seniors in North Philadelphia, sponsored by PHA.
Powelton Heights	30	30	Leased/Issued	No	Existing site for seniors in West Philadelphia sponsored by Mission First Housing Group.
Preston St	7	7	Leased/Issued	No	Existing site for low-income families in the West Philadelphia area sponsored by Mission First Housing Group.
Ray's Place	17	17	Leased/Issued	No	Existing site for homeless persons with a serious mental illness in North Philadelphia sponsored by Project Home. Supportive services are provided.

Property Name	# of Project-Based Vouchers		Status at End of Year	RAD?	Description of Project
	Planned	Actual			
Reed St	8	8	Leased/Issued	No	Existing site for low-income families in South Philadelphia sponsored by Mission First Housing Group.
Regent Terrace	80	80	Leased/Issued	No	Existing site for very low-income families in West Philadelphia sponsored by Regent Terrace Housing Partnership.
Reynolds School	0	49	Leased/Issued	Yes	Adaptive reuse to convert elementary school into housing for homeless veterans sponsored by HELP USA. Supportive services to be provided.
Rhawn St	11	11	Leased/Issued	No	Existing site for low-income families in Northeast Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
Roberto Clemente House	38	38	Leased/Issued	Yes	Substantial rehabilitation development in North Philadelphia serving low-income families, sponsored by Nueva Esperanza. Supportive services are provided.
Sandy's/Catherine House	3	3	Leased/Issued	No	Existing site for homeless individuals in South Philadelphia sponsored by CATCH. Supportive services are provided.
Sarah Allen IV	2	2	Leased/Issued	No	Existing site for low-income families in West Philadelphia sponsored by Friends Rehab.
Sarah Allen V	3	3	Leased/Issued	No	Existing site for low-income families in West Philadelphia sponsored by Friends Rehab.
Sarah Allen Community Homes	1	1	Leased/Issued	No	Existing site for low-income families in West Philadelphia sponsored by Friends Rehab.
Sartain School	35	35	Leased/Issued	No	Existing site for seniors in North Philadelphia sponsored by Sartain School Venture.
Sheff/Wingate St	8	8	Leased/Issued	No	Existing site for low-income families in Northeast Philadelphia sponsored by Mission First Housing Group.
Sheila D Brown Women's Center	9	9	Leased/Issued	No	Existing site for women with behavioral disabilities in South Philadelphia sponsored by Mission First Housing Group.
SIL Program	13	13	Leased/Issued	No	Existing site for individuals with mental health/chemical dependency in Roxborough. Supportive services provided. Sponsored by Inter Community Action
South 55th St LP	18	18	Leased/Issued	No	Existing site for diverse tenants in West Philadelphia sponsored by Ingerman.
South Phila Scattered	19	11	Leased/Issued	No	Existing site for low-income families in Northeast Philadelphia sponsored by Mission First Housing Group.
Spring Garden	9	9	Leased/Issued	No	Existing site for homeless families with disability in West Philadelphia sponsored by Peoples Emergency Center. Supportive services are provided.
Spruce St	3	3	Leased/Issued	No	Existing site for low-income families in South Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
St John Neumann	52	52	Leased/Issued	Yes	New construction in South Philadelphia serving seniors, sponsored by Archdiocese of Philadelphia.
Strawberry Mansion	55	55	Leased/Issued	Yes	New construction in North Philadelphia for low-income families, sponsored by PHA.
Susquehanna Apt	47	47	Leased/Issued	No	Existing site for very low-income families in North Philadelphia sponsored by Susquehanna Apts LP.
Susquehanna Square	37	37	Committed	Yes	New Construction development in North Philadelphia serving low income families sponsored by Community Ventures.

Property Name	# of Project-Based Vouchers		Status at End of Year	RAD?	Description of Project
	Planned	Actual			
Thompson St	20	20	Leased/Issued	No	Existing site for very low-income families in Center City and West Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
Tillmon Villanueva	38	38	Leased/Issued	No	Existing site for women and their families in North Philadelphia sponsored by Women's Community Revitalization Project. Supportive services are provided.
Tioga Family Center	24	24	Leased/Issued	No	Existing site for homeless low-income individuals in East Mt Airy sponsored by Gaudenzia Foundation Inc. Supportive services are provided.
Tioga Gardens	17	17	Leased/Issued	No	Existing site for very low-income families in North Philadelphia sponsored by Tioga Gardens Associates.
Walnut Park Plaza	224	224	Leased/Issued	No	Existing site for low-income seniors in West Philadelphia sponsored by Walnut Park Associates LLC.
Walnut Park Plaza (ADA)	3	3	Leased/Issued	No	Existing site for low-income seniors in West Philadelphia sponsored by Walnut Park Associates LLC.
Walnut St	15	15	Leased/Issued	No	Existing site for very low-income families in West Philadelphia sponsored by Mission First Housing Group.
WCRP TNI 1	12	12	Leased/Issued	No	Existing site for women and their families in North Philadelphia sponsored by Women's Community Revitalization Project. Supportive services are provided.
WCRP TNI 2	9	9	Leased/Issued	No	Existing site for women and their families in North Philadelphia sponsored by Women's Community Revitalization Project. Supportive services are provided.
WCRP-Grace	36	36	Leased/Issued	No	Existing site for women and their families in North Philadelphia sponsored by Women's Community Revitalization Project. Supportive services are provided.
Witherspoon Senior Apts	40	40	Leased/Issued	Yes	New construction in West Philadelphia serving seniors, sponsored by Presbys Inspired Life. Supportive services are provided.
	3,705	3,863	Total Planned and Actual Existing Project-Based Vouchers		

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

The total number of existing project-based vouchers was higher than planned as a result of three (3) developments (27th & Susquehanna, Norris Apartments Phase V, and Reynolds Schools) which were under an AHAP (or HAP) sooner than anticipated and prior to the start of the fiscal year. Additionally, fourteen units were sold to existing HCV landlords at three (3) developments previously sponsored by Mission First; these units are now leased to tenants with tenant-based vouchers.

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

PHA, in collaboration with the City of Philadelphia and a network of community partners, continued to pursue opportunities and take action to help further the mutual goal of development of new affordable housing. Table 4 below provides an update on changes to PHA’s housing stock during FY 2022 not discussed elsewhere in the Report and an update on planned initiatives that were identified in the FY 2022 Annual Plan.

Table 4: Actual Other Changes to MTW Housing Stock in the Plan Year

Site	Description of Project from FY 22 Plan	Status as of March 31, 2022
Brooklyn Heights	PHA is negotiating the acquisition (PRA) of land in the Mill Creek neighborhood to develop approximately 32 units.	PHA continued to pursue the acquisition (PRA) of land in the Mill Creek neighborhood and worked to address complex title issues in order to develop approximately 32 units on the property.
Gordon Street Phase II (Strawberry Mansion)	PHA has selected a partner for the second phase development to support up to 70 rental units adjacent to the newly developed Gordon Apartments.	PHA continued planning and preparation for the second phase of development at Gordon Street, which will include approximately 70 rental units adjacent to the newly developed Gordon Apartments.
Falls Ridge	PHA listed the property for sale at fair market value and accepted an offer proposing construction of approximately 150 market rate units. Closing on the transaction is projected for calendar year 2020.	The developer was unable to close on the property. PHA is remarketing the property at fair market value.
Sharswood Development	PHA has designated Hunt Companies as developer for certain off-site parcels in the Sharswood community. PHA and Hunt have developed a plan for additional housing development in support of the CNI Transformation Plan goals. PHA and Hunt Companies jointly applied for a Choice Neighborhood Implementation grant in November 2019 and was awarded a \$30,000,000 grant. PHA will issue several development partner RFPs for the homeownership phases.	See narrative in MTW Initiatives and Accomplishments for details on Sharswood Transformation Plan activities.
2012 Chestnut Street	PHA entered into a development agreement with a private developer (Alterra Property Group) to develop the vacant, former PHA headquarters site at 2012 Chestnut Street into up to 200 units of housing of which 20% will be targeted to households with incomes at or below 80% of Area Median Income. The development will also include 7,000 square ft. of commercial space. The developer was chosen through an RFP process. The developer is in the predevelopment stage, with construction anticipated to start once the financing plan is finalized.	This project is ongoing; PHA anticipates that construction of housing and commercial space may commence in FY 2023, once the financing plan has been finalized.
Bartram Village	PHA entered into a predevelopment agreement with Pennrose Properties to evaluate the redevelopment of Bartram Village. PHA was awarded Choice Neighborhoods Planning grant funds for Bartram Village and the surrounding Kingsessing neighborhood to support the development of a comprehensive Transformation Plan. PHA submitted the CNI Transformation Plan to HUD and HUD accepted the Plan in April 2020. Implementation of “action activities” funded under the CNI Planning Grant are scheduled to commence in FY 2021. PHA continues working with its development partner to secure funding to implement the initial phases of the Transformation Plan, and to plan for a future CNI Implementation Grant application.	This project is ongoing; PHA anticipates that the first phase of redevelopment at Bartram will commence in FY 2023 subject to funding availability.

Site	Description of Project from FY 22 Plan	Status as of March 31, 2022
Vaux Community Building	PHA completed Phases 1 and 2 of renovations of the Vaux Community Building, which has received EnVision Center designation by HUD. In April 2020, PHA opened a new Workforce Center to provide comprehensive employment and training services to PHA and community residents. Partners including the Temple University Nursing Clinic are also providing services in the facility. Big Picture Philadelphia continues to operate a high school at the Vaux Community Building.	PHA has completed the majority of the renovations to the building, which serves as a community center and focal point for the Sharswood/Blumberg neighborhood revitalization effort. In addition to PHA's Workforce Center, Section 3 Resource Center and Job Bank, partners such as Temple and CVS continued to provide services and programming at Vaux. Big Picture Philadelphia continued to operate a high school and renovations to the school's auditorium are planned for the future, subject to funding availability.
Fairhill Acquisition, Redevelopment	PHA intends to acquire publicly and privately owned parcels in the neighborhood adjacent to Fairhill Apartments in connection with the redevelopment of the site.	PHA continued to pursue the acquisition of publicly and privately owned parcels in the neighborhood adjacent to Fairhill Apartments in connection with redevelopment and RAD conversion of the site.
Harrison Plaza	PHA intends to redevelop the existing high-rise building part of the Harrison Plaza conventional site into a senior preference building and will utilize the RAD program as part of the redevelopment.	PHA is nearing completion of construction at Harrison Plaza Senior Tower. PHA also worked to finalize plans to rehabilitate and convert the remaining buildings at the site to RAD.
West Park Apartments	PHA issued a developer partner RFP to work with on a comprehensive redevelopment plan to redevelop the campus which could include mixed use development.	PHA selected L+M Development Partners and MSquared as partners and a pre-development agreement was approved for the joint venture to develop the site with approximately 650 rental units and other uses. PHA has begun negotiations with the development partners on an agreement for the final plan to redevelop the site.

The RAD program allows PHA to leverage MTW Block Grant, private and other capital sources through conversion of public housing subsidies to long-term project-based assistance. RAD is a fundamental component of PHA's efforts to secure new capital resources necessary for the long-term preservation of PHA's existing housing portfolio. RAD also allows PHA to transfer subsidies from long-term vacant and distressed scattered site properties to new developments ("transfer of assistance). Table 5 provides a list of 28 RAD development transactions that have closed through FY 2022, including transactions that closed in prior periods. Including only those RAD projects that have already closed, total development costs exceed \$950 million including over \$453 million in private equity.

Table 5: RAD Conversions: Closed Transactions through FY 2022

Property Name	RAD Units	Description
2415 N. Broad	88	Transfer of Assistance
St John Neumann Place II	52	Transfer of Assistance
H.E.L.P Philadelphia V	37	Transfer of Assistance
New Courtland at St. Bartholomew	42	Transfer of Assistance
Lehigh Park I	49	Transfer of Assistance
Strawberry Mansion	55	Transfer of Assistance
Haddington III	48	Transfer of Assistance

Property Name	RAD Units	Description
Roberto Clemente House	38	Transfer of Assistance
Southwark Plaza (PA2-121)	470	Conversion of existing AME public housing
Cantrell Place	40	Transfer of Assistance
Witherspoon Senior Apartments	40	Transfer of Assistance
1315 N. 8th Street	25	Transfer of Assistance
Norris Square Community Alliance Scattered Sites	29	Transfer of Assistance
Norris Apartments II (CNI)	74	CNI RAD Conversion
Plymouth Hall (PA2-079)	53	Conversion of existing public housing
Blumberg Phase I	51	Transfer of Assistance
Blumberg Phase II-Senior Building	94	Conversion of existing public housing
Norris Apartments Phase III	28	CNI RAD Conversion
Blumberg 83	83	Transfer of Assistance
Susquehanna Square	37	Transfer of Assistance
Reynolds School	49	Transfer of Assistance
Norris Apartments Phase V (CNI)	45	CNI RAD Conversion
Sharswood I (Hunt)	30	Transfer of Assistance
27 th and Susquehanna	78	Transfer of Assistance
Queen Lane LP	55	Conversion of existing PAPMC public housing
Norris LP	51	Conversion of existing PAPMC public housing
Harrison Plaza Tower	112	Conversion of tower building of existing public housing development
Sharswood II (Hunt)	30	CNI RAD Conversion
TOTAL	1,883	

In FY 2022, PHA also made progress planning for RAD conversions at Fairhill (Initial Phase), West Park and Harrison Low-Rise developments and on new “Faircloth to RAD” developments. PHA projects closing on an additional 1,101 units at 13 developments under the RAD program in FY 2023. See FY 2023 MTW Annual Plan for additional details on planned RAD conversion activities for the next fiscal year. Actual unit counts and conversion timetables may vary depending on various factors including financing and regulatory approvals.

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

The backlog of unmet and unfunded capital needs for PHA’s public housing developments is estimated at \$1+ billion and growing. PHA can address only a small fraction of its capital needs with existing funding. The oldest PHA developments were built more than 70 years ago, and twenty-eight (28) sites are now more than 40 years old. Several sites are functionally obsolete from design, efficiency and operating cost perspectives; however, the availability of funding to support major redevelopment efforts has been extremely limited, a situation that appears unlikely to change in the near future, given federal budget constraints. PHA continues to aggressively pursue conversions through RAD in part to leverage funds to ensure long-term preservation of the existing portfolio. Table 6 provides a general description of actual capital expenditures in FY 2022.

Table 6: Actual Capital Expenditures in FY 2022

Project Type/Project Description	Site Name	Actual Expenses
504 Unit modification/Fair Housing	Abbotsford Homes	\$46,886
504 Unit modification/Fair Housing	Arch Homes	\$450
504 Unit modification/Fair Housing	Arlene Homes	\$1,184
504 Unit modification/Fair Housing	Bartram Village	\$55,251
504 Unit modification/Fair Housing	Bentley Hall	\$1,455
504 Unit modification/Fair Housing	Blumberg Senior Tower	\$1,084
504 Unit modification/Fair Housing	Cambridge Plaza I	\$12,494
504 Unit modification/Fair Housing	Cambridge Plaza II	\$3,595
504 Unit modification/Fair Housing	Cambridge Plaza III	\$9,872
504 Unit modification/Fair Housing	Cassie L Holley	\$505
504 Unit modification/Fair Housing	Cecil B Moore	\$52
504 Unit modification/Fair Housing	Champlost Homes	\$1,858
504 Unit modification/Fair Housing	College View	\$10,335
504 Unit modification/Fair Housing	Emlen Arms	\$33,105
504 Unit modification/Fair Housing	Fairhill Square	\$5,936
504 Unit modification/Fair Housing	Francisville	\$6,078
504 Unit modification/Fair Housing	Germantown House	\$23,187
504 Unit modification/Fair Housing	Gladys B Jacobs	\$41,784
504 Unit modification/Fair Housing	Greater Grays Ferry Estates I	\$2,942
504 Unit modification/Fair Housing	Greater Grays Ferry II-A	\$389
504 Unit modification/Fair Housing	Haddington	\$8,665
504 Unit modification/Fair Housing	Haddington Homes	\$47,821
504 Unit modification/Fair Housing	Harrison Plaza	\$2,208
504 Unit modification/Fair Housing	Haverford Homes	\$92
504 Unit modification/Fair Housing	Hill Creek	\$19,240
504 Unit modification/Fair Housing	Holmecrest Homes	\$9,358
504 Unit modification/Fair Housing	Johnson Homes	\$22,682
504 Unit modification/Fair Housing	Katie B Jackson	\$591
504 Unit modification/Fair Housing	Kingssing	\$14,290
504 Unit modification/Fair Housing	Lucien E. Blackwell I	\$265
504 Unit modification/Fair Housing	Ludlow	\$17,762
504 Unit modification/Fair Housing	Ludlow Phase III	\$23,840
504 Unit modification/Fair Housing	Mantua	\$6,253
504 Unit modification/Fair Housing	Mantua I	\$12,250
504 Unit modification/Fair Housing	Marshal Shepard	\$1,111
504 Unit modification/Fair Housing	Morton Homes	\$5,620
504 Unit modification/Fair Housing	Mount Olivet	\$943
504 Unit modification/Fair Housing	Nellie Reynolds Garden	\$19,780

Project Type/Project Description	Site Name	Actual Expenses
504 Unit modification/Fair Housing	Norris Apartments LP	\$763
504 Unit modification/Fair Housing	North Central CNI Phase II LP	\$302
504 Unit modification/Fair Housing	North Central CNI Phase III	\$363
504 Unit modification/Fair Housing	Oakdale Street Project	\$566
504 Unit modification/Fair Housing	Oxford Jefferson	\$3,435
504 Unit modification/Fair Housing	Oxford Village	\$66,864
504 Unit modification/Fair Housing	Parkview Apartments	\$303
504 Unit modification/Fair Housing	Plymouth Hall LLC	\$526
504 Unit modification/Fair Housing	Queen Lane Apartments LP	\$1,320
504 Unit modification/Fair Housing	Queen's Row Low Income	\$363
504 Unit modification/Fair Housing	Raymond Rosen	\$26,024
504 Unit modification/Fair Housing	Richard Allen	\$1,575
504 Unit modification/Fair Housing	Richard Allen IIIA	\$1,012
504 Unit modification/Fair Housing	Scattered Sites-Fairhill Square	\$14,477
504 Unit modification/Fair Housing	Scattered Sites-Francisville	\$23,334
504 Unit modification/Fair Housing	Scattered Sites-Germantown/Hunting Park	\$13,909
504 Unit modification/Fair Housing	Scattered Sites-Haddington	\$22,856
504 Unit modification/Fair Housing	Scattered Sites-Kingsessing	\$34,448
504 Unit modification/Fair Housing	Scattered Sites-Ludlow	\$42,787
504 Unit modification/Fair Housing	Scattered Sites-Mantua	\$7,251
504 Unit modification/Fair Housing	Scattered Sites-Oxford Jefferson	\$6,090
504 Unit modification/Fair Housing	Scattered Sites-Strawberry Mansion	\$22,511
504 Unit modification/Fair Housing	Spring Garden Apartments	\$531
504 Unit modification/Fair Housing	Strawberry Mansion	\$5,291
504 Unit modification/Fair Housing	Susquehanna	\$7,999
504 Unit modification/Fair Housing	Warnock I	\$1,191
504 Unit modification/Fair Housing	Warnock II	\$7,502
504 Unit modification/Fair Housing	West Park Apartments	\$1,886
504 Unit modification/Fair Housing	Westpark Plaza	\$384
504 Unit modification/Fair Housing	Whitehall Apartments	\$2,696
504 Unit modification/Fair Housing	Wilson Park - Senior	\$64,213
504 Site modifications/Fair Housing	Abbottsford Homes	\$9,088
504 Site modifications/Fair Housing	Arch Homes	\$1,094
504 Site modifications/Fair Housing	Arlene Homes	\$1,615
504 Site modifications/Fair Housing	Cecil B Moore	\$4,646
504 Site modifications/Fair Housing	Champlost Homes	\$7,279
504 Site modifications/Fair Housing	College View	\$5,490
504 Site modifications/Fair Housing	Fairhill Apartments	\$851
504 Site modifications/Fair Housing	Fairhill Square	\$34,138
504 Site modifications/Fair Housing	Francisville	\$37,277

Project Type/Project Description	Site Name	Actual Expenses
504 Site modifications/Fair Housing	Germantown/Hunting Park	\$39,129
504 Site modifications/Fair Housing	Haddington	\$28,883
504 Site modifications/Fair Housing	Haddington Homes	\$21,467
504 Site modifications/Fair Housing	Harrison Plaza	\$18,373
504 Site modifications/Fair Housing	Haverford Homes	\$1,100
504 Site modifications/Fair Housing	Hill Creek	\$25,254
504 Site modifications/Fair Housing	Johnson Homes	\$41,458
504 Site modifications/Fair Housing	Kingsessing	\$38,631
504 Site modifications/Fair Housing	Ludlow	\$44,172
504 Site modifications/Fair Housing	Mantua	\$21,595
504 Site modifications/Fair Housing	Morton Homes	\$15,371
504 Site modifications/Fair Housing	Oxford Jefferson	\$16,526
504 Site modifications/Fair Housing	Oxford Village	\$23,375
504 Site modifications/Fair Housing	Parkview Apartments	\$426
504 Site modifications/Fair Housing	Queen Lane Apartments	\$1,454
504 Site modifications/Fair Housing	Raymond Rosen	\$35,493
504 Site modifications/Fair Housing	Richard Allen	\$17,152
504 Site modifications/Fair Housing	Scattered Sites-Fairhill Square	\$9,830
504 Site modifications/Fair Housing	Scattered Sites-Francisville	\$7,351
504 Site modifications/Fair Housing	Scattered Sites-Germantown/Hunting Park	\$4,375
504 Site modifications/Fair Housing	Scattered Sites-Haddington	\$5,416
504 Site modifications/Fair Housing	Scattered Sites-Kingsessing	\$11,466
504 Site modifications/Fair Housing	Scattered Sites-Ludlow	\$10,831
504 Site modifications/Fair Housing	Scattered Sites-Mantua	\$4,425
504 Site modifications/Fair Housing	Scattered Sites-Oxford Jefferson	\$3,457
504 Site modifications/Fair Housing	Scattered Sites-Strawberry Mansion	\$5,948
504 Site modifications/Fair Housing	Scattered Sites-Susquehanna	\$12,936
504 Site modifications/Fair Housing	Spring Garden Apartments	\$6,365
504 Site modifications/Fair Housing	Strawberry Mansion	\$28,443
504 Site modifications/Fair Housing	Susquehanna	\$17,545
504 Site modifications/Fair Housing	Whitehall Apartments	\$2,349
504 Site modifications/Fair Housing	Wilson Park - Senior	\$41,790
A & E Services/PHA Contract	Norris Apartments LP	\$1,730,606
A & E Services/PHA Contract	Queen Lane Apartments LP	\$10,786
A&E Costs	Blumberg Phase 6A	\$22,552
A&E Fees & Professional Serv	Arlene Homes	\$3,900
A&E Fees & Professional Serv	Bartram Village	\$9,878
A&E Fees & Professional Serv	Bentley Hall	\$1,315
A&E Fees & Professional Serv	Blumberg 4A 60 Units	\$677,823
A&E Fees & Professional Serv	Blumberg 83 Units	\$2,343

Project Type/Project Description	Site Name	Actual Expenses
A&E Fees & Professional Serv	Blumberg Apts	\$4,950
A&E Fees & Professional Serv	Blumberg Phase 6A	\$93,990
A&E Fees & Professional Serv	Fairhill Apartments	\$1,315
A&E Fees & Professional Serv	Fairhill Apartments Phase I	\$155,220
A&E Fees & Professional Serv	Gladys B Jacobs	\$3,900
A&E Fees & Professional Serv	Harrison Plaza LP	\$22,380
A&E Fees & Professional Serv	Harrison Plaza Phase I	\$7,841
A&E Fees & Professional Serv	Hunt Development Sharswood	\$9,000
A&E Fees & Professional Serv	Johnson Homes	\$47,698
A&E Fees & Professional Serv	Ludlow	\$7,751
A&E Fees & Professional Serv	Ludlow Phase III	\$4,274
A&E Fees & Professional Serv	North Central CNI Phase II LP	\$3,106
A&E Fees & Professional Serv	Parkview Apartments	\$4,274
A&E Fees & Professional Serv	Raymond Rosen	\$9,876
A&E Fees & Professional Serv	Richard Allen	\$9,883
A&E Fees & Professional Serv	West Park Apartments	\$6,976
Community Relations/Outreach	Blumberg Apts	\$27,300
Comp unit mod, SMART II	Fairhill Square	\$317,499
Comp unit mod, SMART II	Germantown/Hunting Park	\$108,969
Comp unit mod, SMART II	Haddington	\$290,325
Comp unit mod, SMART II	Kingsessing	\$69,874
Comp unit mod, SMART II	Ludlow	\$150,920
Comp unit mod, SMART II	Mantua	\$57,999
Comp unit mod, SMART II	Oxford Jefferson	\$301,216
Comp unit mod, SMART II	Scattered Sites-Fairhill Square	\$556,222
Comp unit mod, SMART II	Scattered Sites-Francisville	\$38,027
Comp unit mod, SMART II	Scattered Sites-Ludlow	\$112,024
Comp unit mod, SMART II	Scattered Sites-Oxford Jefferson	\$188,038
Comp unit mod, SMART II	Scattered Sites-Strawberry Mansion	\$544,801
Comp unit mod, SMART II	Scattered Sites-Susquehanna	\$56,465
Comp unit mod, SMART II	Strawberry Mansion	\$231,945
Comp unit mod, SMART II	Susquehanna	\$758,125
Concrete and pavement	Harrison Plaza	\$4,180
Concrete and pavement	Hill Creek	\$5,160
Concrete and pavement	Morton Homes	\$1,330
Concrete and pavement	Oxford Jefferson	\$11,129
Concrete and pavement	Scattered Sites-Germantown/Hunting Park	\$1,904
Concrete and pavement	Scattered Sites-Strawberry Mansion	\$491
Concrete and pavement	Spring Garden Apartments	\$28,500
Demolition	Beyond Foster Care On Ridge	\$105,532

Project Type/Project Description	Site Name	Actual Expenses
Electrical distribution system	West Park Apartments	\$55,864
Energy Performance Contracts	Abbotsford Homes	\$225,000
Energy Performance Contracts	Arch Homes	\$100,000
Energy Performance Contracts	Bartram Village	\$2,630
Energy Performance Contracts	Bentley Hall	\$17,898
Energy Performance Contracts	Cambridge Plaza II	\$1,315
Energy Performance Contracts	Cassie L Holley	\$5,989
Energy Performance Contracts	Fairhill Apartments	\$1,550
Energy Performance Contracts	Gladys B Jacobs	\$17,476
Energy Performance Contracts	Haddington	\$2,433
Energy Performance Contracts	Haddington Homes	\$1,315
Energy Performance Contracts	Harrison Plaza	\$214,077
Energy Performance Contracts	Haverford Homes	\$5,112
Energy Performance Contracts	Ludlow	\$1,289
Energy Performance Contracts	Morton Homes	\$361,872
Energy Performance Contracts	Oxford Village	\$4,274
Energy Performance Contracts	Parkview Apartments	\$268,000
Energy Performance Contracts	Pha-Wide	\$434,399
Energy Performance Contracts	Plymouth Hall LLC	\$4,274
Energy Performance Contracts	Queen Lane Apartments	\$4,807
Energy Performance Contracts	Strawberry Mansion	\$81,934
Energy Performance Contracts	Westpark Plaza	\$155,790
Energy Performance Contracts	Whitehall Apartments	\$268,000
Environ issues-LBP/asbestos	Haddington	\$880
Environ issues-LBP/asbestos	Haddington Homes	\$5,582
Environ issues-LBP/asbestos	Ludlow	\$2,610
Environ issues-LBP/asbestos	Nellie Reynolds Garden	\$4,274
Environ issues-LBP/asbestos	Pha-Wide	\$2,300
Environ issues-LBP/asbestos	Raymond Rosen	\$366
Environ issues-LBP/asbestos	Scattered Sites-Fairhill Square	\$2,834
Environ issues-LBP/asbestos	Spring Garden Apartments	\$6,114
Environ issues-LBP/asbestos	Wilson Park - Senior	\$518
Environmental hazard abate	Bartram Village	\$1,826
Environmental hazard abate	Bentley Hall	\$2,168
Environmental hazard abate	Champlost Homes	\$245,121
Environmental hazard abate	Emlen Arms	\$8,227
Environmental hazard abate	Hill Creek	\$2,548
Environmental hazard abate	Holmecrest Homes	\$4,274
Environmental hazard abate	Kingsessing	\$5,050
Exterior building structures	College View	\$24,798

Project Type/Project Description	Site Name	Actual Expenses
Exterior building structures	Germantown/Hunting Park	\$3,914
Exterior building structures	Kingsessing	\$13,239
Exterior building structures	Richard Allen	\$13,003
Exterior building structures	Scattered Sites-Haddington	\$3,877
Exterior building structures	Scattered Sites-Mantua	\$4,605
Exterior building structures	Scattered Sites-Susquehanna	\$4,362
Exterior building structures	Susquehanna	\$29,092
Fire code compliance	Abbottsford Homes	\$2,630
Fire code compliance	Arch Homes	\$1,315
Fire code compliance	Arlene Homes	\$105,966
Fire code compliance	Bentley Hall	\$78,250
Fire code compliance	Blumberg Senior Tower	\$1,315
Fire code compliance	Cambridge Plaza I	\$1,315
Fire code compliance	Cambridge Plaza III	\$1,315
Fire code compliance	Cassie L Holley	\$269,033
Fire code compliance	Cecil B Moore	\$11,671
Fire code compliance	Champlost Homes	\$16,094
Fire code compliance	Emlen Arms	\$2,663
Fire code compliance	Fairhill Square	\$5,294
Fire code compliance	Francisville	\$5,294
Fire code compliance	Germantown/Hunting Park	\$5,294
Fire code compliance	Gladys B Jacobs	\$3,437
Fire code compliance	Greater Grays Ferry Estates I	\$3,978
Fire code compliance	Haddington	\$28,109
Fire code compliance	Harrison Plaza	\$4,085
Fire code compliance	Haverford Homes	\$4,274
Fire code compliance	Hill Creek	\$19,504
Fire code compliance	Holmecrest Homes	\$26,242
Fire code compliance	Hunt Sharswood Phase II	\$81,925
Fire code compliance	Johnson Homes	\$4,274
Fire code compliance	Katie B Jackson	\$4,274
Fire code compliance	Kingsessing	\$5,294
Fire code compliance	Ludlow	\$12,294
Fire code compliance	Mantua	\$5,294
Fire code compliance	Marshal Shepard	\$4,274
Fire code compliance	Martin Luther King IV	\$4,274
Fire code compliance	Morton Homes	\$4,274
Fire code compliance	Mount Olivet	\$4,274
Fire code compliance	Norris Apartments LP	\$4,274
Fire code compliance	Oxford Jefferson	\$15,044

Project Type/Project Description	Site Name	Actual Expenses
Fire code compliance	Oxford Village	\$15,095
Fire code compliance	Queen Lane Apartments LP	\$4,274
Fire code compliance	Raymond Rosen	\$1,127,690
Fire code compliance	Richard Allen	\$4,274
Fire code compliance	Spring Garden Apartments	\$18,437
Fire code compliance	Strawberry Mansion	\$5,294
Fire code compliance	Susquehanna	\$5,294
Fire code compliance	West Park Apartments	\$4,274
Fire code compliance	Westpark Plaza	\$4,274
Fire code compliance	Whitehall Apartments	\$5,579
Fire code compliance	Wilson Park - Senior	\$4,439
Heating Plant Upgrades	Emlen Arms	\$27,579
Heating Plant Upgrades	Scattered Sites-Francisville	\$1,109
Heating Plant Upgrades	Scattered Sites-Germantown/Hunting Park	\$790
Heating Plant Upgrades	Scattered Sites-Kingsessing	\$126
Heating Plant Upgrades	Scattered Sites-Ludlow	\$124
Heating Plant Upgrades	Scattered Sites-Mantua	\$3,202
Heating Plant Upgrades	Scattered Sites-Oxford Jefferson	\$899
Heating Plant Upgrades	Wilson Park - Senior	\$94,889
Infrastructure	Blumberg Apts	\$23,736
Interior wall repair	Bartram Village	\$38,206
Interior wall repair	Fairhill Square	\$31,835
Interior wall repair	Haddington	\$9,842
Interior wall repair	Ludlow	\$34,000
Interior wall repair	Mantua	\$34,000
Interior wall repair	Scattered Sites-Germantown/Hunting Park	\$31,867
Interior wall repair	Scattered Sites-Kingsessing	\$21,867
Interior wall repair	Scattered Sites-Mantua	\$900
Interior wall repair	Strawberry Mansion	\$29,245
Interior wall repair	Susquehanna	\$25,540
Interior wall repair	Wilson Park - Senior	\$1,949,720
Landscaping, tree trimming	Fairhill Square	\$9,882
Landscaping, tree trimming	Francisville	\$324
Landscaping, tree trimming	Haddington	\$6,336
Landscaping, tree trimming	Kingsessing	\$10,773
Landscaping, tree trimming	Ludlow	\$4,225
Landscaping, tree trimming	Mantua	\$9,200
Landscaping, tree trimming	Oxford Jefferson	\$12,018
Landscaping, tree trimming	Raymond Rosen	\$35,000
Landscaping, tree trimming	Scattered Sites-Francisville	\$2,381

Project Type/Project Description	Site Name	Actual Expenses
Landscaping, tree trimming	Scattered Sites-Haddington	\$240
Landscaping, tree trimming	Scattered Sites-Mantua	\$4,036
Landscaping, tree trimming	Scattered Sites-Strawberry Mansion	\$1,314
Landscaping, tree trimming	Scattered Sites-Susquehanna	\$6,167
Landscaping, tree trimming	Strawberry Mansion	\$5,510
Landscaping, tree trimming	Susquehanna	\$21,423
LBP testing/monitor asbestos	Abbottsford Homes	\$26,207
LBP testing/monitor asbestos	Arch Homes	\$9,130
LBP testing/monitor asbestos	Arlene Homes	\$357
LBP testing/monitor asbestos	Bartram Village	\$27,523
LBP testing/monitor asbestos	Champlost Homes	\$21,773
LBP testing/monitor asbestos	Haddington Homes	\$24,213
LBP testing/monitor asbestos	Harrison Plaza	\$2,107
LBP testing/monitor asbestos	Haverford Homes	\$298
LBP testing/monitor asbestos	Hill Creek	\$41,295
LBP testing/monitor asbestos	Johnson Homes	\$78,352
LBP testing/monitor asbestos	Morton Homes	\$22,910
LBP testing/monitor asbestos	Oxford Village	\$60,343
LBP testing/monitor asbestos	Pha-Wide	\$31,867
LBP testing/monitor asbestos	Raymond Rosen	\$30,370
LBP testing/monitor asbestos	Richard Allen	\$43,360
LBP testing/monitor asbestos	Scattered Sites-Fairhill Square	\$51,795
LBP testing/monitor asbestos	Scattered Sites-Francisville	\$50,059
LBP testing/monitor asbestos	Scattered Sites-Germantown/Hunting Park	\$43,773
LBP testing/monitor asbestos	Scattered Sites-Haddington	\$64,572
LBP testing/monitor asbestos	Scattered Sites-Kingsessing	\$83,360
LBP testing/monitor asbestos	Scattered Sites-Ludlow	\$21,018
LBP testing/monitor asbestos	Scattered Sites-Mantua	\$40,833
LBP testing/monitor asbestos	Scattered Sites-Oxford Jefferson	\$26,123
LBP testing/monitor asbestos	Scattered Sites-Strawberry Mansion	\$44,817
LBP testing/monitor asbestos	Scattered Sites-Susquehanna	\$32,097
LBP testing/monitor asbestos	Spring Garden Apartments	\$61,623
LBP testing/monitor asbestos	West Park Apartments	\$604
LBP testing/monitor asbestos	Wilson Park - Senior	\$43,369
MTW - Concrete	Abbottsford Homes	\$1,230,769
MTW - Concrete	Arch Homes	\$665,350
MTW - Concrete	Arlene Homes	\$114,815
MTW - Concrete	Cecil B Moore	\$192,282
MTW - Concrete	Champlost Homes	\$1,315
MTW - Concrete	College View	\$394,597

Project Type/Project Description	Site Name	Actual Expenses
MTW - Concrete	Fairhill Square	\$1,500
MTW - Concrete	Germantown House	\$1,315
MTW - Concrete	Germantown/Hunting Park	\$1,500
MTW - Concrete	Gladys B Jacobs	\$247,192
MTW - Concrete	Harrison Plaza	\$11,625
MTW - Concrete	Haverford Homes	\$126,505
MTW - Concrete	Holmecrest Homes	\$576,424
MTW - Concrete	Johnson Homes	\$6,080
MTW - Concrete	Katie B Jackson	\$59,092
MTW - Concrete	Mantua	\$1,710
MTW - Concrete	Morton Homes	\$427,392
MTW - Concrete	Oxford Village	\$807,978
MTW - Concrete	Parkview Apartments	\$99,864
MTW - Concrete	Raymond Rosen	\$121,858
MTW - Concrete	Richard Allen	\$342,291
MTW - Concrete	Richard Allen IIIA	\$4,274
MTW - Concrete	Sharswood PHA HomeO Phase III	\$2,769
MTW - Concrete	Spring Garden Apartments	\$1,281,356
MTW - Concrete	Strawberry Mansion	\$22,282
MTW - Concrete	Suffolk Manor	\$4,274
MTW - Concrete	Susquehanna	\$1,500
MTW - Concrete	West Park Apartments	\$197,706
MTW - Concrete	Whitehall Apartments	\$766,189
MTW - Concrete	Wilson Park - Senior	\$2,000
MTW - New Development	Katie B Jackson	\$20,024
MTW - New Development	North Central CNI Phase III	\$349,983
MTW - Tree Removal	Bartram Village	\$12,864
MTW - Tree Removal	Raymond Rosen	\$9,000
MTW Exterior Wall Repair/Repla	Germantown/Hunting Park	\$3,214
MTW Exterior Wall Repair/Repla	Haddington Homes	\$850,000
MTW Property Acquisition	Blumberg Apts	\$100,065
New Development	Hunt Development Sharswood	\$3,348,665
New Development	Mamie Nichols Townhomes	\$500,000
New Development	PHA Sharswood North Lot	\$20,987,898
Non-Dwelling	Blumberg Apts	\$9,804
Plumbing upgrades	Hill Creek	\$87,495
Public Infrastructure	Richard Allen IIIA	\$235,604
Relocation	Abbottsford Homes	\$5,414
Relocation	Arch Homes	\$2,734
Relocation	Bartram Village	\$15,921

Project Type/Project Description	Site Name	Actual Expenses
Relocation	Champlost Homes	\$2,159
Relocation	College View	\$1,104
Relocation	Emlen Arms	\$4,538
Relocation	Fairhill Apartments	\$167,430
Relocation	Fairhill Square	\$6,435
Relocation	Francisville	\$6,174
Relocation	Gladys B Jacobs	\$4,211
Relocation	Haddington	\$5,653
Relocation	Haddington Homes	\$3,749
Relocation	Harrison Plaza	\$10,213
Relocation	Holmecrest Homes	\$1,356
Relocation	Johnson Homes	\$5,571
Relocation	Katie B Jackson	\$1,075
Relocation	Kingsessing	\$6,852
Relocation	Ludlow	\$8,764
Relocation	Mantua	\$1,484
Relocation	Morton Homes	\$4,900
Relocation	Oxford Jefferson	\$450
Relocation	Oxford Village	\$3,889
Relocation	Plymouth Hall	\$1,382
Relocation	Raymond Rosen	\$3,585
Relocation	Scattered Sites-Ludlow	\$1,173
Relocation	Scattered Sites-Mantua	\$4,244
Relocation	Spring Garden Apartments	\$4,489
Relocation	Strawberry Mansion	\$1,250
Relocation	West Park Apartments	\$62,273
Relocation	Wilson Park - Senior	\$19,850
Replacement Housing	Blumberg 83 Units	\$1,140,364
Replacement Housing	Harrison Senior Tower LP	\$11,060,078
Replacement Housing	North Central CNI Phase III	\$267
Replacement Housing	North Central CNI Phase V	\$5,475,665
Roof repair/replacement	Arch Homes	\$18,803
Roof repair/replacement	Bartram Village	\$27,950
Roof repair/replacement	Fairhill Square	\$7,995
Roof repair/replacement	Germantown/Hunting Park	\$259,752
Roof repair/replacement	Gladys B Jacobs	\$12,900
Roof repair/replacement	Haddington	\$255,696
Roof repair/replacement	Hill Creek	\$54,260
Roof repair/replacement	Katie B Jackson	\$15,509
Roof repair/replacement	Kingsessing	\$194,947

Project Type/Project Description	Site Name	Actual Expenses
Roof repair/replacement	Morton Homes	\$7,033
Roof repair/replacement	Oxford Jefferson	\$119,609
Roof repair/replacement	Raymond Rosen	\$1,988,230
Roof repair/replacement	Scattered Sites-Fairhill Square	\$14,672
Roof repair/replacement	Scattered Sites-Francisville	\$4,546
Roof repair/replacement	Scattered Sites-Germantown/Hunting Park	\$4,786
Roof repair/replacement	Scattered Sites-Kingsessing	\$17,348
Roof repair/replacement	Scattered Sites-Ludlow	\$16,134
Roof repair/replacement	Scattered Sites-Mantua	\$9,217
Roof repair/replacement	Scattered Sites-Oxford Jefferson	\$15,332
Roof repair/replacement	Scattered Sites-Strawberry Mansion	\$3,725
Roof repair/replacement	Scattered Sites-Susquehanna	\$12,609
Roof repair/replacement	Westpark Plaza	\$11,724
Total		\$71,728,458

B. Leasing Information

i. Actual Number of Households Served

PHA provided housing assistance to approximately 30,892 households in FY 2022 through Public Housing (n=11,779), HCV (n=19,080), including both MTW and Non-MTW Special Purpose vouchers, and local, non-traditional MTW programs (n=33). Excluding non-MTW vouchers, the total number of MTW-only households served was 29,078 as shown on the HUD required Table 7 below. The MTW HCV Utilized figure includes RAD vouchers/units. Non-MTW vouchers are shown in Table 8.

Table 7: MTW Households Served Planned vs. Actual

Planned Number of Households Served Through:	Number of Unit Months Occupied/Leased		Number of Households Served	
	Planned	Actual	Planned	Actual
MTW Public Housing Units Leased	142,692	141,347	11,891	11,779
MTW Housing Choice Vouchers (HCV) Utilized*	219,252	207,194	18,271	17,266
Local, Non-Traditional: Tenant-Based	0	0	0	0
Local, Non-Traditional: Property-Based	456	394	38	33
Local, Non-Traditional: Homeownership	0	0	0	0
Planned/Actual Totals	360,156	348,935	30,200	29,078

Describe any differences between the planned and actual households served:

PHA noted in the Annual Plan that the actual number of households served may vary based on RAD conversion schedules and other factors. In addition to variances in RAD conversion schedules, other factors that resulted in differences in the number of households served included

changes to lease up schedules for new project-based developments, move out rates and unit turnover timetables. See also “Discussion of Any Actual Issues/Solutions Related to Leasing” narrative below.

Table 8: Non-MTW Households Served Planned vs. Actual

Non-MTW Program to be Served Through:	Planned Number of Unit Months Occupied/Leased		Planned Number of Households Served	
	Planned	Actual	Planned	Actual
Mainstream	4,140	4,069	345	339
FUP	900	4,182	75	349
VASH	9,444	8,015	787	668
VASH Project Based	168	75	14	6
Moderate Rehab	2,436	2,022	203	169
SRO	3,552	3,309	296	276
EHV	0	86	0	7
Planned/Actual Totals	20,640	21,758	1,720	1,814

Table 9: MTW Local, Non-Traditional Programs

Local, Non-Traditional Category	MTW Activity/Number	Number of Unit Months Occupied/Leased		Number of Households Served	
		Planned	Actual	Planned	Actual
Tenant-Based	N/A	0	0	0	0
Property-Based	Shared Housing/MTW 2020-2*	456	394	38	33
Homeownership	N/A	0	0	0	0
Planned/Actual Totals		456	394	38	33

Table 10: 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
0	0	0

In addition to its public housing and HCV rental assistance programs, PHA utilizes MTW funds to support public housing and HCV residents who wish to become first-time homebuyers. PHA’s Homeownership Department works with a network of local partners to provide counseling, financial literacy, down payment assistance and other support services. In FY 2022, a total of 94 residents became first time homebuyers through PHA’s various homeownership programs, including 13 residents who purchased scattered site units through the 5h program, 28 HCV participants who utilized vouchers to purchase private market unit, and 53 PHA families who purchased units in the private market through assistance from the Public Housing new mobility program and/or received other forms of assistance.

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

Table 11: Issues/Solutions Related to Leasing

Housing Program	Description of Actual Leasing Issues and Possible Solutions
MTW Housing Choice Voucher	<p>During FY 2022, PHA implemented a variety of activities to increase utilization in the HCV program. To increase the number of families assisted, over 4000 applicants were pulled from the HCV waiting list. To increase the number of landlords participating in the HCV program, PHA provided incentives to over 1,400 landlords. These incentives included time-limited signing bonuses for owners who submitted a Request for Tenancy Approval (RFTA) and leased up a new HCV unit by September 30, 2021 (\$500 bonus) or by March 31, 2022 (\$300 bonus); Housing Opportunity Program (HOP) area signing bonus of \$1,000 for owners who submitted a RFTA and leased a new unit in an opportunity area (must have poverty rate of <20% and meet other criteria related to jobs, educational and other opportunities); and, payments of up to \$2,500 for HOP area owners to cover vacancy turnaround expenses above and beyond normal wear and tear and not covered by the security deposit, provided that the owner agrees to lease the unit again to another HCV participant. In total, PHA provided over \$500,000 in incentive payments to attract and retain new landlords in the HCV program.</p> <p>Note also that leasing was impacted by the timing of PBV environmental reviews and other factors.</p>

C. Waiting List Information

i. Actual Waiting List Information

In FY 2022, PHA continued to maintain waiting lists in accordance with its Board of Commissioners-approved HCV Administrative Plan and Public Housing Admissions and Continued Occupancy Policy, as applicable. PHA’s conventional and scattered sites, PAPMC-managed, and Alternatively Managed Entities (AME) public housing sites remained subject to site-specific waitlist policies. PHA also operated a centralized “first available” waitlist for referral programs and for applicants who elected this option. As public housing sites convert to Project-Based Voucher (PBV) assistance through the RAD program, PHA converts the existing public housing site-based waiting lists, where applicable, to PBV site-based waiting lists. Conventional and scattered site public housing waiting lists remained open for seniors, those needing accessible units, and special programs including the nursing home initiative, Blueprint to End Homelessness, and DHS Youth Aging Out Pilot Program. PAPMC and AME waiting lists remained open in FY 2022.

The HCV waiting list remained open only for applicants who qualify for admission under HUD’s Special Purpose Voucher programs (VASH, Mainstream, and EHV) and for applicants referred to PHA from external agencies with whom PHA has a referral agreement as described in the Administrative Plan such as the “Blueprint” and “Second Chance” programs. These applicants are referred to PHA, entered onto the waiting list and then selected for either the Special Purpose Voucher or per the referral agreement.

Developments under PHA’s Unit Based Voucher program, including RAD developments, continued to establish and operate site-based waiting lists in accordance with PHA’s HCV Administrative Plan and/or with each owner’s regulatory and operating agreement with PHA or approved tenant selection plan. PHA’s waiting list data does not include UBV site-based waiting list data, except for PAPMC-managed UBV developments.

Table 12 provides information on HCV, conventional and scattered site public housing and PAPMC-managed waiting list as of March 31, 2022.

Table 12: Waiting List Information at Fiscal Year End

Waiting List Name	Description	Number of Households on Waiting List	Waiting List Open, Partially Open or Closed	Was the Waiting List Opened During the Fiscal Year
HCV Tenant Based	Community-Wide	9,491	Closed	No
HCV Project Based (PAPMC managed only)	Site-Based	21,112	Open	Open
Public Housing 1 – Conventional & Scattered Sites	First Available and Site-Based	13,893	Partial – Open for Seniors & 504 Applicants only	Yes, if needed
Public Housing 2 – PAPMC Tax Credit	Site-Based	40,180	Open	Open

Describe any duplication of applicants across waiting lists:

Waiting lists are maintained separately by program, and there may be duplication across the various waiting lists. For example, households on the HCV waiting list may also be on the Public Housing and/or PAPMC lists.

For informational purposes, details on the racial and ethnic composition of PHA’s waiting list applicants are provided in Tables 13 and 14 below. PHA has also provided data on its Limited English Proficiency Policy as an appendix to this document.

Table 13: Waiting List Applicants by Race

Waiting List	White	Black	American Indian	Asian	Hawaiian/Pacific Islander	Other	Total
MTW Public Housing Units	2,255	9,972	287	223	101	1,055	13,893
MTW Public Housing Units *	5,571	29,964	850	578	327	2,890	40,180
MTW Housing Choice Voucher Program	1,168	7,155	357	272	56	483	9,491
PBV/PHA Owned	3,071	16,006	405	276	224	1,130	21,112
Total	12,065	63,097	1,899	1,349	708	5,558	84,676

*Units funded with LIHTC and managed by PAPMC

Table 14: Waiting List Applicants by Ethnicity

Waiting List	Hispanic	Non Hispanic	Other	Total
MTW Public Housing Units	1,323	12,563	7	13,893
MTW Public Housing Units *	4,432	35,724	24	40,180
MTW Housing Choice Voucher Program	658	8,819	14	9,491
PBV/PHA Owned	2,758	18,342	12	21,112
Total	9,171	75,448	57	84,676

* Units funded with LIHTC and managed by PAPMC

ii. Actual Changes to Waiting Lists in the Plan Year

PHA implemented its waiting list policies in accordance with Board approved policy documents.

D. Statutory Objectives and Requirements

Under the MTW Agreement between PHA and HUD, PHA 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

Within the public housing program, approximately 91% of households served are very low income, i.e. households with incomes at or below 50% of Area Median Income. Within the HCV program, greater than 95% of households served are very low income. HUD verifies this data through PHA's electronic submissions under HUD's PIC system. The number of households admitted to the new Shared Housing Pilot Program, a local, non-traditional MTW activity, during the fiscal year is included in Table 15 below.

Table 15: 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	0
49% - 30% Area Median Income	1
Below 30% Area Median Income	33
Total Local, Non-Traditional Households Admitted	34

Note that the actual number of households served as shown on Table 15 may differ from that shown on Table 9 due to HUD's requirement for calculating Table 9.

ii. Maintain Comparable Mix

As first noted in the FY 2014 Annual Report, beginning in May 2013, HUD has required MTW agencies to provide data on the number of persons in each household served as of the date of entry to the MTW program and as of the current fiscal year. While PHA has this data available for the current fiscal year, it does not have data and is unable to report on household size as of April 2001, which is the effective date of the MTW Agreement.

Note that PHA provided *bedroom size* data as part of its initial MTW submissions; however, PHA was not required to provide *household size* data. PHA's current information technology systems do not have 2001 data available. Therefore, PHA is not able to provide the information required in Tables 16 and 17 below relative to the size of families served in the MTW baseline year. PHA will work with HUD's MTW Office to identify potential solutions to this issue if necessary. For

informational purposes, Table 18 provides a breakdown of PHA households by bedroom size when PHA became an MTW agency.

Table 16: Baseline Mix of Family Sizes Served

BASELINE MIX OF FAMILIES SERVED UPON ENTRY TO MTW					
Family Size	Occupied Number of Public Housing units	Utilized HCVs	Non-MTW Adjustments	Baseline Mix Number	Baseline Mix Percentage
1 Person	N/A	N/A	N/A	N/A	N/A
2 Person	N/A	N/A	N/A	N/A	N/A
3 Person	N/A	N/A	N/A	N/A	N/A
4 Person	N/A	N/A	N/A	N/A	N/A
5 Person	N/A	N/A	N/A	N/A	N/A
6+ Person	N/A	N/A	N/A	N/A	N/A
TOTAL	N/A	N/A	N/A	N/A	N/A

Please describe the justification for any “Non-MTW Adjustments” given above:
N/A

Table 17: Mix of MTW Family Sizes Served in FY 2022

Family Size	Baseline Mix Percentage	Number of MTW Households Served in Plan Year	Percentage of MTW Households Served in Plan Year	Percentage Change from Baseline Year to Current Plan Year
1 Person	N/A	13,488	45%	N/A
2 Person	N/A	5,808	20%	N/A
3 Person	N/A	4,495	15%	N/A
4 Person	N/A	3,030	10%	N/A
5 Person	N/A	1,559	5%	N/A
6+ Person	N/A	1,275	4%	N/A
TOTAL	N/A	29,655		N/A

Note that the actual number of households served as shown on Table 17 may differ from that shown on Table 7 due to HUD’s requirement for calculating Table 7.

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

Table 18: Mix of MTW Households by Bedroom Size in April 2001

	Bedroom Sizes of PHA Households in April 2001		
	Public Housing	HCV	Total
1 Bedroom/SRO	2,113	2,722	4,835
2 Bedroom	3,157	3,369	6,526
3 Bedroom	4,332	5,834	10,166
4 Bedroom	1,180	918	2,098
5 Bedroom	691	195	886
6+ Bedroom	245	50	295

Total	11,718	13,088	24,806
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iii. Number of Households Transitioned to Self-Sufficiency in the Plan Year

HUD requires information on households transitioned to self-sufficiency for any MTW activities that report on HUD’s standard metric SS #8. Table 19 below provides the HUD-required information.

Table 19: Transition to Self Sufficiency

MTW Activity Name & Number	Number of Households Transitioned to Self-Sufficiency	MTW PHA Definition of Self Sufficiency
Activity #2004-3: Simplification and Streamlining of Rent and Recertification Processes for Public Housing and HCV	HCV: 7 PH: 322	For HCV, PHA defines a household that transitions to self-sufficiency as a household that exits the program as a result of being over-income or one that receives \$0 or less in HAP subsidy, but still qualifies as a program participant. For public housing, PHA defines a household that transitions to self-sufficiency as a public housing household whose income is at or above 80% AMI.
Activity #2016-1: Second Chance Initiative	1	PHA defines self-sufficiency for the Second Chance Initiative as successful completion of the program and transition to other affordable housing.
Activity #2020-1: Local Family Self-Sufficiency Program	0	In the FSS program, self-sufficiency is defined as graduation from the five-year local FSS program.
	0	Households Duplicated Across MTW Activities
	330	Total Households Transitioned to Self Sufficiency

III. PROPOSED MTW ACTIVITIES

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

IV. APPROVED MTW ACTIVITIES

A. Implemented Activities

ACTIVITY 2004-1: NEIGHBORHOOD DEVELOPMENT & REVITALIZATION INITIATIVES

Description/Impact/Update

PHA utilizes MTW authority to substantially increase housing choices for residents and applicants. PHA is continuing to implement an ambitious program of new construction, substantial rehabilitation, and modernization designed to revitalize PHA public housing developments, replace distressed housing lost to demolition and lack of capital funds, and improve Philadelphia's neighborhoods. Public housing development or redevelopment activities directly undertaken by PHA as developer are included under this initiative. To support these redevelopment activities, PHA continues to implement the following MTW components, which also support the Partnership Initiative and other MTW activities:

- Design Standards - PHA continues to implement reasonable and modest design standards for new construction and rehabilitation work that mirror current design trends and the 21st century needs of residents.
- Total Development Cost Limits and Housing Cost Caps - PHA has established and maintains reasonable cost limits for development and redevelopment activities that replace HUD's Total Development Cost (TDC) limits and Housing Cost Caps (HCC).
- Streamlined Mixed-Finance Development Process - PHA is authorized to develop public housing through several financing methods, including the mixed-finance approach, which involves the use of private financing, Housing Choice Vouchers, and public housing development funds.
- MTW Site and Neighborhood Standards - PHA is authorized to implement alternate Site and Neighborhood Standards for its public housing and voucher programs, in lieu of those standards at 24 CFR § 941.202(b)-(d) and 24 CFR 983.57.
- Streamlined Acquisition Process - Subject to the provisions of the MTW Agreement, PHA is authorized to acquire sites without prior HUD approval, provided that the agency certifies that HUD site selection requirements have been met.
- Strategy for Development - PHA has adopted a Development-Asset Management Strategy for Public Housing that takes a comprehensive neighborhood-by-neighborhood and block-by-block approach to redeveloping, consolidating, rehabilitating, demolishing, and acquiring and disposing of scattered site units independently and in partnership with government and other local neighborhood-based organizations.

Approval and Implementation

- Design Standards
 - Approved FY 2004
 - Implemented FY 2004
- Total Development Cost Limits and Housing Cost Caps
 - Approved FY 2004
 - Implemented FY 2004
- Streamlined Mixed-Finance Development Process
 - Approved FY 2004
 - Implemented FY 2004
- MTW Site and Neighborhood Standards
 - Approved FY 2004
 - Implemented FY 2004
- Streamlined Acquisition Process
 - Approved FY 2002
 - Implemented FY 2002
- Strategy for Development
 - Approved FY 2005
 - Implemented FY 2005

Hardship

Not applicable.

Actual Non-Significant Changes

There were no non-significant changes to this activity in FY 2022.

Actual Significant Changes

There were no significant changes to this activity in FY 2022.

Changes to Metrics

No changes were made to the metrics. New units developed by PHA or its affiliates that are not public housing are included as part of the Unit Based Leasing and Development activity.

Challenges in Achieving Benchmarks & Possible Strategies

Not applicable.

Metrics:

<i>CE #1: Agency Cost Savings *</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease)	TBD	\$0	\$0	Yes
*PHA has previously noted that this metric is not applicable to this activity; however, HUD has required its use. PHA is not able to derive a baseline for these activities which were initially implemented in FY 2004 (i.e. over 10 years before implementation of HUD standard 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).	TBD	0	0	Yes

**PHA has previously noted that this metric is not applicable to this activity; however, HUD has required its use. PHA is not able to derive a baseline for these activities which were initially implemented in FY 2004 (i.e. over 10 years before implementation of HUD standard metrics).*

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).	0	0	0	Yes

**PHA has previously noted that this metric is not applicable to this activity; however, its use is required by HUD. PHA does not track error rates associated with the Neighborhood Development and Revitalization Initiative activities listed above.*

CE #4: Increase in Resources Leveraged

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Amount of funds leveraged in dollars (increase).	\$0	\$0	\$0	Yes

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	0	0	Yes

HC #2: Units of Housing Preserved

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase).	0	0	0	Yes

HC #3: Decrease in Wait List Time *

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average applicant time on wait list in months (decrease).	Public Housing – 14 years for participants housed in FY 2015	TBD		

**PHA establishes new site-based waiting lists for each new development. The baseline used is the agency wide average wait time for Public Housing. PHA does not know how many applicants will apply for the proposed development(s); therefore, is unable to establish a benchmark for this development at this time.*

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	0	0	Yes

ACTIVITY 2004-2: SERVICE-ENRICHED HOUSING FOR SENIORS & PEOPLE WITH DISABILITIES

Description/Impact/Update

PHA continued to collaborate with the Commonwealth of Pennsylvania and other local providers to develop and implement a range of service-enriched housing options for seniors and people with disabilities, including the following ongoing MTW program components:

- *Nursing Home Transition* – The Nursing Home Transition Initiative (NHTI) assists persons transitioning out of nursing homes with accessing affordable housing. As part of NHTI, PHA administers up to seventy-five (75) state-supported vouchers/housing opportunities for referrals of disabled consumers in need of low-income housing. NHTI families may be eligible for a preference for public housing or HCV.
- *Definition of Elderly* – An elderly person is defined as an individual who is at least 55 years old. An elderly family is defined as one with a head of household, co-head, spouse or sole member who is at least 55 years old.

During FY 2022, PHA served 67 families under the Nursing Home Transition initiative. PHA continued to work with partnering agencies to assist individuals transitioning out of nursing homes. Under this activity, PHA has received referrals to assist persons transitioning out of nursing homes with access to affordable housing through the Public Housing and HCV programs. As of June 30, 2020, the Department of Human Services (DHS) ceased referrals to the HCV program. PHA will continue to provide HCV subsidies to NHTI participants who were referred prior to June 30, 2020. Public Housing will continue to receive new referrals; their participation in this initiative was not impacted.

Approval and Implementation

- Nursing Home Transition
 - Approved FY 2010
 - Implemented FY 2010
- Definition of Elderly
 - Approved FY 2004
 - Implemented FY 2004

Hardship

Not applicable.

Actual Non-Significant Changes

There were no non-significant changes to this activity in FY 2022.

Actual Significant Changes

There were no significant changes to this activity in FY 2022.

Changes to Metrics

No changes were made to the metrics in the FY 2022 Annual Plan.

Challenges in Achieving Benchmarks & Possible Strategies

PHA relies on referrals from partnering agencies in order to assist individuals through the Nursing Home Transition Initiative. PHA received 30 referrals of applicants to be housed through the NHTI in the Public Housing program, of which 16 applicants were housed. As of June 30, 2020, DHS ceased new referrals to the HCV portion of NHTI; as a result, no new NHTI participants were assisted with vouchers in FY 2022.

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 – Nursing Home Transition (NHT)	75 – Ongoing (NHT)	51 (HCV) <u>16 (PH)</u> 67 Total	No
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase housing choice (increase).	0 – Nursing Home Transition (NHT)	75 – Ongoing (NHT)	51 (HCV) <u>16 (PH)</u> 67 Total	No

ACTIVITY 2004-3: SIMPLIFICATION AND STREAMLINING OF RENT AND RECERTIFICATION PROCESSES FOR PUBLIC HOUSING AND HCV

Description/Impact/Update

PHA continued to implement a series of MTW initiatives in the public housing and/or HCV programs designed to simplify rent calculation and recertification, streamline administrative processes, and reduce paperwork burdens on residents and staff.

- *Two and Three-Year Recertification/Limit on Interims* – Public Housing and HCV, including UBV/RAD require recertifications every two years, except for public housing residents choosing ceiling rents who are recertified every three years. Voluntary interim recertifications are restricted to one every six months, except for elderly and disabled households who are exempt from this restriction. PHA will process voluntary interim rent reductions if and when the reduction in income lasts for more than 30 days. In FY 2017, PHA began conducting recertifications every three years for elderly or disabled households on fixed incomes in both the HCV and public housing programs.
- *Ceiling Rents* – PHA has established ceiling rents for its public housing developments, which are periodically updated. PHA tenants will continue to have the option of selecting either a ceiling rent or an income-based rent. PHA uses ceiling rents when calculating rent for mixed families. PHA notes that, pursuant to the HOTMA legislation and policies approved by the PHA Board in March 2019, ceiling rent policies will not apply to certain households who are “over-income” for twenty-four consecutive months. Over-income households are defined as those with household income at or greater than 120% of Area Median Income, and will be subject to an alternative rent. Additional details regarding this policy can be found in PHA’s Admissions and Continued Occupancy Policy.
- *Rent Calculation Method* – PHA has established an alternative rent structure for the HCV (including UBV/RAD) and public housing programs to motivate residents to work and accumulate savings. In FY 2017, PHA began allowing households with assets of \$50,000 or less to self-certify asset value and income from the assets. Asset income is excluded when the value of the household’s asset is \$50,000 or less. Asset income for household assets valued at greater than \$50,000 is calculated by using the market value of the asset times the passbook savings rate. Also, in FY 2017, PHA began excluding all full-time student earned income for family members other than the head, spouse or co-head and PHA discontinued verification of full-time student earned income as 100% of the income is excluded.
- *Payment Standards* – PHA has implemented a policy in the HCV program whereby the current payment standard is applied at regular recertification; however, this policy was modified due to required regulatory implementation of SAFMRs. Additionally, PHA approved payment standards up to 120% of the FMR to support leasing for existing voucher clients and/or new voucher holders who wish to move to areas with documented improved educational systems, job opportunities, social services and other opportunities in the expectation that over time their need for housing and other subsidies will abate or diminish.

- *Reasonable Rent*
 - PHA has implemented a reasonable rent policy for the HCV Program, including UBV/RAD, whereby reasonable rent determinations are completed at initial lease up, upon request for a rent increase, and at other times PHA deems it necessary to conduct a reasonable rent redetermination.
 - PHA may implement across-the-board rent increases or rent freezes for properties in the HCV Program. When and if an across-the-board rent increase is awarded, PHA will complete a reasonable rent determination at the time of the next annual HQS inspection and apply applicable policies related to reasonable rent when and if the rent is not reasonable.

- *Utility Allowances*
 - PHA is authorized to implement a revised utility allowance methodology that includes the following components:
 - HCV participants who are responsible for paying gas heat and who are eligible to participate in the PGW Customer Responsibility Program (CRP) have the gas portion of their utility allowances calculated using an alternative methodology. PHA may elect to implement this utility allowance program in public housing where applicable.
 - PHA will periodically, at its discretion, review HCV utility allowance schedules to determine if adjustments are required. Annual updates are not required.
 - Utility allowances may be phased out for residents with incomes at or above 80% of Area Median Income or public housing residents on ceiling rent.
 - PHA will review and modify public housing utility schedules periodically based on an assessment of available HUD funding and the requirements of the MTW Agreement and Plan.
 - PHA is also authorized to expand the utility allowance policy to require public housing and HCV tenants receiving either heat or electric utility allowances to enroll and participate in the PECO Customer Assistance Plan, LIHEAP and any other applicable programs that offer reduced rates, energy usage grants, or other financial incentives to low-income households.
 - For HCV participants only, during an interim recertification, PHA will apply the utility allowance in effect on the effective date of the interim recertification; however, families on the Alternate Utility Allowance (UA) CRP Program will have their gas utility allowance updated at the time of interim recertification consistent with PHA's MTW UA policies. During an interim recertification, PHA will apply the payment standard in effect at the last regular recertification.
 - PHA is also authorized to expand the utility allowance policy to require public housing and HCV tenants, whose incomes are at or below 150% of the Federal Poverty Level and who receive a utility allowance for water, to enroll and participate in the Philadelphia Water Department's Tiered Assistance Program (TAP). TAP provides customers with significant savings by offering a consistent bill based on their income. PHA will base the water utility

allowance for eligible households on the amount charged under the TAP Program. Water charges range from 2% to 3% of gross income.

PHA has not yet implemented flexibility to require families to enroll in the TAP or PECO programs. In FY 2023, PHA will evaluate the feasibility of both the TAP and PECO programs to determine how they will move forward.

PHA adopted Small Area Fair Market Rents (SAFMR) beginning in FY 2019 with revisions to the groupings of SAFMR zip codes in FY 2020. These revisions were necessary to avoid negative financial impacts to both tenants and owners. With implementation of SAFMRs, HCV participants have greater opportunity to rent in opportunity neighborhoods. To encourage participants to move to high-opportunity zip codes where contract rents may be higher, the Housing Opportunity Program (HOP) assists voucher-holders in searching for a unit in these neighborhoods. In FY 2022, 21 families successfully leased up in high-opportunity neighborhoods through support from the HOP program.

Approval and Implementation

- Two and Three-Year Recertification/Limit on Interims
 - Approved FY 2004
 - Implemented FY 2004
- Ceiling Rents
 - Approved FY 2004
 - Implemented FY 2004
- Rent Calculation Method
 - Approved FY 2004
 - Implemented FY 2004
 - Modified FY 2017
- Payment Standards
 - Approved FY 2008
 - Implemented FY 2008
- Reasonable Rent
 - Across-the-board Rent Increases
 - Approved FY 2008
 - Implemented FY 2008
 - Streamline Reasonable Rent Determinations
 - Approved FY 2005
 - Implemented FY 2005
- Utility Allowances
 - PGW CRP Program
 - Approved FY 2009
 - Implemented FY 2014
 - PECO Customer Assistance Plan Enrollment
 - Approved FY 2011
 - Not yet implemented
 - Interim Recertification Utility Allowance
 - Approved FY 2017

- Implemented FY 2017
- Philadelphia Water Department’s Tiered Assistance Program (TAP)
 - Approved FY 2019
 - Not yet implemented
- Minimum HAP Payment
 - Approved FY 2019
 - Implemented FY 2019

Hardship

PHA has adopted a hardship policy which considers exceptions to all of PHA’s rent and utility allowance policies on a case-by-case basis for families who can demonstrate a long-term hardship that will result from application of the policies to them, or as a reasonable accommodation. Hardship exemption requests must be submitted in writing and explain the nature of the hardship and include any applicable documentation.

In FY 2022, in both the HCV and Public Housing Program, PHA received seven (7) hardship requests related to this activity; all seven (7) requests were approved.

Actual Non-Significant Changes

In FY 2022, PHA implemented the following non-significant changes:

Rent & Recertification Policies

PHA may apply the applicable simplification and streamlining policies included in this activity to Public Housing households who are living in housing operated by PAPMC, subject to investor approval as needed.

Limit on Voluntary Interims

The COVID-19 pandemic continued to have a significant impact on low income families in FY 2022. Accordingly, PHA modified this activity to temporarily lift the limit on voluntary interim rent reductions for non-exempt families during times of economic/health emergencies declared by the mayor or his/her designee. In FY 2023, PHA may make determinations as to when to re-impose the limit.

Minimum HAP Payment

In FY 2022, PHA reversed its MTW policy regarding program termination for families whose HAP payments are \$50 or less for 180 days. This policy has had a minimal impact since its implementation in FY 2019 and created an additional administrative burden for staff as participants often requested interim recertifications upon receiving notice of their upcoming termination. PHA removed the Minimum HAP Payment from this activity and follows regulatory guidelines regarding automatic termination of the HAP contract.

Small Area FMRs

A number of neighborhoods in the city of Philadelphia are undergoing significant revitalization. Property values and rents in these revitalized areas are increasing; however, SAFMRs are not always in concert with the pace of the revitalization. Additionally, there may be individual parts of an SAFMR area which have undergone revitalization; however, the SAFMR reflects the areas

which have not been revitalized. For example, in one revitalized area, one side of the street is in one zip code and the other side of the street is in another. The SAFMRs for a 2 BR unit in the two zip codes are \$1,890 and \$940. While all of the units in the zip code with the lower SAFMR are not in the revitalized area, those that are, are at a significant disadvantage for inclusion in the HCV program as a result of the application of existing SAFMRs and payment standards which do not reflect market conditions. Accordingly, in FY 2022, PHA established exception payment standards for individual units within a SAFMR zip code and removed the 120% limitation. As with all other HCV units, PHA includes documentation in the file that the rent is reasonable when setting payment standards outside of the allowable range without HUD approval.

PHA has received approval but has not yet implemented the following:

Verification and Calculation of Earned Income

In FY 2022, PHA received approval to implement a revised method for verifying and calculating earned income. Specifically, PHA will verify and calculate earned income using the last four consecutive quarters in EIV. In cases where earned income is not in EIV or the tenant disputes the earned income calculation, PHA will seek third party verification to verify and calculate income and/or reconcile the difference. PHA will continue to use third party verification for unemployment as well as other sources of income not contained in EIV. Where the working family deduction is concerned, family members who report employment income will self-certify the number of hours they work each week. This policy applies to Public Housing only.

Actual Significant Changes

There were no significant changes to this activity in FY 2022.

Changes to Metrics

The metrics for CE #1 and CE #2 were updated to reflect both the current hourly rate and the volume of certifications anticipated in FY 2022. Additionally, the metric for SS #8 was updated to reflect a decrease in the number of households who are anticipated to transition to self-sufficiency.

Please note that PHA received approval in the FY 2023 MTW Plan to remove the following metrics: CE #1: Agency Cost Savings, SS #1: Increase in Household Income, SS #3: Increase in Positive Outcomes in Employment Status, and SS #8: Households Transitioned to Self Sufficiency. PHA will begin to report on the revised metrics for this activity in the FY 2023 MTW Report.

Challenges in Achieving Benchmarks & Possible Strategies

PHA did not meet benchmarks for agency cost savings due to an increase in the staff hourly rate. However, PHA was able to meet the benchmark for staff time savings.

Metrics:

<i>CE #1: Agency Cost Savings *</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease)	\$878,122 (estimate)	\$860,430	\$873,606	No

*Includes HCV and PH.

CE #2: Staff Time Savings *				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	56,110 hours (estimate)	29,000 hours	28,623 hours	Yes

*Includes HCV and PH.

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).	5%	5%	HCV: 6% PH: 0%	HCV: No PH: Yes

* The error rate is a weighted average. PHA implemented its revised rent calculation method in 2004, and did not have historical data on rent calculation error rates at that time. PHA identified the baseline as part of the FY 16 Annual Report (which already reflects error rate reductions) and then established a benchmark of maintaining this level going forward, i.e. PHA would not anticipate future reductions to error rates.

CE #5: Increase in Agency Rental Revenue – Utility Allowance Policy *				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Rental revenue in dollars (increase).	\$606,753	\$606,753	\$723,240	Yes

*Represents the savings generated by PHA on behalf of households who receive the CRP UA for gas heat.

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). – HCV	\$17,032	\$18,331	\$27,399	Yes
Average earned income of households affected by this policy in dollars (increase). – PH	\$20,749	\$20,749	\$30,953	Yes

* Although this activity was implemented in FY 04, HUD required PHA to track the average earned income of households affected by this policy ten years after the policy was implemented; therefore, PHA has used data from FY 14 to determine the baseline. As this activity has been implemented and on-going for over 10 years, PHA expects the average earned income of households to remain stable. For additional information, see HUD's Frequently Asked Questions About HUD Form 50900 dated September 13, 2013

SS #3: Increase in Positive Outcomes in Employment Status *				
Unit of Measurement	Baseline*	Benchmark	Outcome	Benchmark Achieved?
Increase in Positive Outcomes in Employment Status – Employed (increase).**	36% (n=4,725) of workable households as of 3/31/14	Increase workable households with employment income to 42%	HCV: 48% 3,558 HOH employed n=7,353 workable HOH PH: 48% 2,176 HOH employed	Yes

			n=4,488 workable HOHs	
Increase in Positive Outcomes in Employment Status – Unemployed (decrease).	64% (n=8,282) of work- able households as of 3/31/14	Decrease work- able households without employment income to 58%	HCV: 52% 3,795 unemployed HOH n=7,353 workable HOH PH: 52% 2,312 unemployed HOH n=4,488 workable HOHs	Yes

** Although this activity was implemented in FY 04, HUD required PHA to track the average earned income of households affected by this policy at least 10 years after it was implemented; therefore PHA has used data from FY 14 to determine the baseline. As this activity has been implemented and on-going for over 10 years, PHA expects the average earned income of households to remain stable. For additional information, see HUD's Frequently Asked Questions About HUD Form 50900 dated September 13, 2013*

*** Work-able is defined as non-elderly, non-disabled. The benchmark is contingent on the economy and opportunities available in the City of Philadelphia.*

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	180 households	HCV: 7 households PH: 322 households	Yes

** For HCV, PHA defines a household that transitions to self-sufficiency as an HCV participant who exits the program as a result of being over-income or one that receives \$0 of HAP subsidy but still qualifies as program participants. For public housing, PHA defines a household that transitions to self-sufficiency as a public housing household whose income is 80% or greater of Area Median Income.*

Note: PHA believes that the above metrics do not accurately reflect the success of this activity as they do not account for unit/population turnover (i.e. households moving out and in over multiple years). The baselines set above reflect a snapshot in time and do not account for families leaving and being replaced by lower-income families resulting in the make-up of the populations being increasingly different over time.

ACTIVITY 2004-4: UNIT-BASED LEASING AND DEVELOPMENT PROGRAM

Description/Impact/Update

Under PHA's Unit-Based Leasing and Development Program ("UBV" or the "Unit-Based Program"), PHA continued to negotiate long-term subsidy contracts with for-profit and non-profit private sector housing providers based on property specific agreements. PHA prioritizes the selection of developments, which serve underserved populations and/or which incorporate supportive services on-site or nearby. Key features of PHA's UBV Program include:

- PHA's Site Selection Standards for the UBV Program comply with the alternate Site and Neighborhood Standards described at Attachment C, Section D (7)(c) to PHA's MTW Agreement.
- Rents to owners participating in the UBV Program funded with MTW HCV funds do not exceed the lowest of 110% of the applicable fair market rent, the reasonable rent, the rent requested by the owner or such other amount determined by PHA 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, PHA may determine that a shallow subsidy is more appropriate.
- Unless part of its "shallow" subsidy UBV Program, PHA does not attach or pay UBV assistance to units that are already receiving another form of subsidized housing operating assistance. With respect to a shallow subsidy UBV Program, PHA does not attach or pay UBV assistance to units receiving another form of subsidized operating assistance if the UBV assistance would be duplicative or would otherwise over-subsidize the unit. PHA may determine the effect of subsidy on rent to owners and the duplication of subsidy or excessive subsidy, subject to the requirements regarding subsidy layering as set forth in the HUD Reform Act of 1989.
- PHA may unit-base up to 100 percent of the dwelling units in any UBV project or building.
- PHA may select its own units for project-basing with UBV assistance without a competitive process. Pursuant to Attachment C, Section D (7)(a) of PHA's MTW Agreement, PHA may unit-base assistance at properties other than public housing properties owned directly or indirectly by PHA, including those owned by PHA affiliates or instrumentalities. For purposes of this selection method, a property that may be unit-based may be a former public housing property that has been converted to HCV assistance.
- Pursuant to Attachment C, Section D (1)(f) of PHA's MTW Agreement, under either the UBV Program or the Partnership Initiatives, PHA may attach or pay UBV assistance using HCV MTW funds to unit types currently prohibited by standard Section 8 regulations including, but not limited, to shared living facilities. Such units must comply with applicable alternate MTW Site and Neighborhood Standards. In February 2017, with the support of the local Veterans Administration, PHA requested HUD approval to enter into a HAP contract under the HUD VASH-PBV Program for an existing, 14-unit shared housing facility (Hancock Manor) operated by Impact Services. HUD accepted PHA's use of the existing MTW waiver related to shared living facilities in project-based developments for this VASH project.

Subject to HUD approval and the support of the VA, PHA may apply MTW waivers related to shared housing facilities in project-based developments to future VASH projects.

- An owner of a unit assisted under the UBV Program with MTW HCV funds may elect to receive referrals from PHA’s waiting list or to use a site-based waiting list for selection of tenants for a site. For owners using a site-based waiting list, PHA reviews and approves the tenant selection plan, and owners refer families to PHA for eligibility screening.
- A family residing in a UBV unit funded with MTW HCV funds may terminate the lease at any time after the initial term. The family must give advance written notice to the owner in accordance with the lease and provide a copy of such notice to PHA. Once a family terminates the lease, the family will no longer be part of the HCV or UBV Program. Pursuant to PHA’s MTW flexibility, PHA does not provide UBV participant families who want to move with tenant-based assistance with a tenant-based HCV voucher, except where required under the RAD Program or otherwise offered by PHA as a reasonable accommodation, VAWA transfer or due to HQS failures under certain circumstances.
- While PHA’s standard initial lease term for public housing and HCV is two years, PHA may allow a shorter term for UBV transitional housing units in order to facilitate the movement of families through the housing continuum and to obtain “permanent” housing more rapidly.
- PHA applies its MTW UBV policy to RAD developments and may project-base 100% of the units in a RAD UBV development.
- PHA is not subject to the requirement for an independent entity to approve AHAP/HAP contract terms, renewals of HAP contracts, rent determinations and inspection of PHA owned units.
- PHA applies the following MTW initiatives to the UBV/RAD Program: Rent Simplification, two and three year recertifications, limit on interim recertifications, alternative rent structure and reasonable rent.
- PHA may utilize local forms, which reflect PHA’s MTW UBV policies and procedures as an alternative to HUD standard forms. For example, PHA will prepare a local PB HAP contract and PB Tenancy Addendum to reflect MTW policies including but not limited to, rent determination methods, recertification frequencies and right to move policies.
- PHA defines a UBV project as a single building, multiple contiguous or non-contiguous buildings, or multiple buildings on contiguous or non-contiguous parcels of land all with a single owner. A single family building is a building with no more than four dwelling units. PHA may elect to combine units that cumulatively meet the definition of a UBV project, but that are covered under more than one Housing Assistance Payments (HAP) Contracts, into a single HAP Contract. For such scattered site projects, PHA implements an alternative method to determine rent reasonableness whereby PHA bases the rent reasonableness determination for all units in the project that are within the same submarket area on the rent reasonableness determination made for a single unit of each bedroom size.

For example, the rent reasonableness determination for all one-bedroom units in the project will be based on the rent reasonableness determination made for a single one-bedroom unit in the project provided that the units are in the same submarket area.

For mixed-finance closings for UBV units involving new public housing units, PHA may request HUD review and approval of certain waivers to current public housing regulations in the interest of increasing housing choice, promoting long-term project viability, and encouraging more third-party development. Specific waivers that may be requested include:

- PHA may elect to allow the owner of UBV units, including PHA if it is the owner, to utilize public housing operating subsidy and other MTW funds, to pay for debt service associated with the UBV development; and,
- Where PHA provides public housing operating subsidy as part of UBV assistance, separately or in combination with voucher or other MTW funds, PHA may have the Declaration of Restrictive Covenants modified to eliminate or change the standard ten-year affordability “tail.”

The specific details of each UBV agreement are defined prior to closing and shall be subject to HUD review and approval, where applicable, as part of the mixed-finance transaction closing process.

In FY 2022, PHA entered into UBV contracts for five (5) UBV projects resulting in 298 new UBV housing opportunities, in addition to providing continuing subsidy for 3,863 UBV units.

Approval and Implementation

- Approved FY 2004
- Implemented FY 2004
- Modifications in FY 2017, FY 2019

Hardship

PHA will provide a tenant-based voucher to a UBV tenant as a result of extended HQS failures. PHA may offer a tenant-based voucher to a UBV tenant who has successfully completed the FSS program and has been deemed eligible for a Homeownership Voucher. In extenuating circumstances and subject to funding availability, PHA may offer tenant-based assistance according to the hierarchy of UBV transfers, for households requiring:

- Transfers due to Personal Safety/VAWA/Other Emergency;
- Reasonable accommodation transfers.

In FY 2022, two (2) hardship requests were approved related circumstances in which tenant-based vouchers were issued to UBV participants.

Actual Non-Significant Changes

There were no non-significant changes to this activity in FY 2022. PHA plans to update the PBV HAP Contract, PBV Tenancy Addendum and PBV Statement of Family Responsibility Form for consistency with PHA’s MTW policies in FY 2023.

Actual Significant Changes

There were no significant changes to this activity in FY 2022.

Changes to Metrics

Benchmarks were updated to reflect UBV activity in FY 2022.

Challenges in Achieving Benchmarks & Possible Strategies

PHA did not meet the benchmarks for HC #1 and HC #5, as fewer new UBV projects were under AHAP or HAP than anticipated as of the end of FY 2022. PHA anticipates that these projects will close in FY 2023.

Metrics:

<i>HC #1: Additional Units of Housing Made Available *</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase).	0 units	578 units	80 units	No
<i>*HUD requires this metric to track only newly constructed and/or rehabilitated units that were put under HAP Contract during the Plan year. This excludes planned RAD conversions of existing public housing including PAPMC-managed units; however, it does include any newly constructed or substantially rehabilitated RAD conversion units.</i>				
<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	1,104 households	298 households	No
<i>* Represents units project-based voucher units newly under HAP or AHAP in FY 2022</i>				
<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 (increase).	0 households	1,828 households	1,871 households	Yes
<i>* Represents UBV units where supportive services are provided.</i>				

ACTIVITY 2005-2: STREAMLINE THE ADMISSIONS AND TRANSFER PROCESS

Description/Impact/Update

PHA continued to implement MTW policies designed to streamline the admissions and transfer policies and processes for both Public Housing and HCV Programs. All approved features of this activity have been implemented.

- *MTW Transfers* - PHA may authorize a limited number of split-family transfers from Public Housing to the Housing Choice Voucher Program and vice versa. These transfers are referred to as MTW transfers. PHA provides for up to 50 Housing Choice Vouchers and 50 public housing units to be transferred back and forth between the Public Housing Program and the HCV Program. No more than 100 moves are authorized per fiscal year.
- *HCV Waiting List* - Once a family is leased under the HCV Program, the family may remain on the waiting lists for Tax Credit and public housing sites; however, PHA notifies the family that they will not be eligible for selection from the Tax Credit or public housing site waiting lists until the initial lease term has been completed.
- *Public Housing Waiting List* - Once a family is housed in public housing, the family will be removed from all other scattered site and conventional public housing waiting lists. However, a family may remain on the HCV and/or Tax Credit Site waiting lists. Additionally, PHA may require that the family sign an agreement whereby the family acknowledges that their name will be removed from all other scattered site and conventional public housing waiting lists and they will not be eligible for selection.

In FY 2022, 42 households were approved for an MTW transfer. Of those approved to transfer from PH to HCV, 15 were leased as of the end of the fiscal year and eight (8) are still searching for a unit.

Approval and Implementation

- MTW Transfers
 - Approved FY 2005
 - Implemented FY 2005
- HCV Waiting List
 - Approved FY 2012
 - Implemented FY 2012
- Public Housing Waiting List
 - Approved FY 2012
 - Implemented FY 2012

Hardship

Not applicable.

Actual Non-Significant Changes

There were no non-significant changes to this activity in FY 2022.

Actual Significant Changes

There were no significant changes to this activity in FY 2022.

Changes to Metrics

The benchmarks for CE #1 and CE #2 were updated to reflect the volume of transfers and hourly rates anticipated for FY 2022.

Please note that PHA received approval in the FY 2023 MTW Plan to remove the following metrics: CE #1: Agency Cost Savings, CE #2: Staff Time Savings, and HC #5: Increase in Resident Mobility. PHA will begin to report on the revised metrics for this activity in the FY 2023 MTW Report.

Challenges in Achieving Benchmarks & Possible Strategies

MTW transfers are requested when a participant’s transfer request cannot be accommodated within the program for reasons including safety and VAWA protection. Accordingly, PHA did not meet the benchmarks for Agency Cost and Time Savings, as the volume of requests for MTW transfers was higher than prior fiscal years.

Metrics:

<i>HC #3: Decrease in Wait List Time – MTW Transfers</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average applicant time on wait list in months (decrease).	PH – 14 years in FY 2015	PH < 1 year	PH < 1 year	Yes
	HCV – 4.5 years in FY 2015	HCV < 1 year	HCV < 1 year	
<i>HC #5: Increase in Resident Mobility – MTW Transfers *</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	30 (estimate)	42	Yes
<i>*PHA has previously indicated that PHA does not believe this metric is applicable to this activity. However, HUD has required its use. PHA is not able to derive a baseline for these activities which were initially implemented in FY 2005 (i.e. almost 10 years before implementation of HUD standard metrics). PHA welcomes HUD’s guidance on a specific methodology for measurement. Once provided, PHA will incorporate such guidance on future plans and reports.</i>				
<i>CE #1: Agency Cost Savings – MTW Transfers</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease).	Not available	\$3,338	\$3,915	No
<i>CE #2: Staff Time Savings – HCV and Public Housing Waiting Lists *</i>				

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	Not available	12.5 hours HCV to PH (10 transfers) 100 hours PH to HCV (20 transfers)	24 hours HCV to PH (19 transfers) 115 hours PH to HCV (23 transfers)	No

** Estimated average staff time to process PH to HCV transfer is 5 hours. Estimated average staff time to process HCV to PH transfer is 1.25.*

ACTIVITY 2005-3: HCV PROGRAM EFFICIENCIES

Description/Impact/Update

PHA continued to implement additional efficiencies in the HCV Program designed to simplify processing and streamline administrative processes. This activity includes:

- *Restriction on Elective Moves* – Families are permitted to move within PHA's jurisdiction after the initial term of assisted occupancy and at the time of regular recertification.
- *Criteria for Portability Moves* – PHA has established criteria for all port-out moves. The criteria require that MTW voucher participants requesting to port-out provide a verified employment, education, safety, or medical/disability need to support their move to another jurisdiction.
- *Development of Local Forms* - PHA will prepare local forms, which reflect PHA's MTW policies and procedures.

In FY 2021, PHA developed a local HAP Contract and Tenancy Addendum as part of the Local Forms initiative. The new HAP contract will be integrated in the PHA's landlord portal system to streamline and expedite the leasing process.

In FY 2022, a total of 1,464 families were approved to transfer to new HCV units under the elective moves portion of this activity. Of those approved to transfer, 105 were approved for a transfer as a result of VAWA protections or safety concerns, and 16 were approved for Reasonable Accommodation. Where portability is concerned, PHA received 439 port out requests, of which 208 were approved. The uptick in portability requests is due in part to the tight rental market in the City of Philadelphia, which prompted some families to submit a portability request to allow them to search for rental unit outside of PHA's jurisdiction. The following is a summary of the approved port-out requests for FY 2022:

- 13 based on education
- 62 based on employment
- 70 based on medical or disability
- 63 based on safety

Approval and Implementation

- Restriction on Elective Moves
 - Approved FY 2008
 - Implemented FY 2008
- Criteria for Portability Moves
 - Approved FY 2013
 - Implemented FY 2013
- Development of Local Forms
 - Approved FY 2017
 - Implemented FY 2017

Hardship

Not applicable. This is not a rent reform activity.

Actual Non-Significant Changes

There were no non-significant changes to this activity in FY 2022.

Actual Significant Changes

There were no significant changes to this activity in FY 2022.

Changes to Metrics

No changes were made to the metrics identified in the FY 2022 Annual Plan.

Please note that PHA received approval in the FY 2023 MTW Plan to remove CE #1: Agency Cost Savings. PHA will begin to report on the revised metrics for this activity in the FY 2023 MTW Report.

Challenges in Achieving Benchmarks & Possible Strategies

PHA did not meet Agency Cost and Staff Time Savings benchmarks for portability requests, as the volume of requests for portability moves was higher than previous fiscal years.

Metrics:

<i>CE #1: Agency Cost Savings *</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Restriction on Elective Moves: Total cost of task in dollars (decrease).	\$25,259	\$55,631	\$49,154	Yes
Criteria for Portability Moves: Total cost of task in dollars (decrease).	\$8,451	\$5,192	\$6,984	No
<i>*PHA implemented this activity in FY 2007 and does not have baseline cost information available for that period. See CE#2 below for this activity for estimate of staff time savings (in hours) already achieved.</i>				
<i>CE #2: Staff Time Savings *</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Restriction on Elective Moves: Total time to complete the task in staff hours (decrease).	1,614 hours (based on 1,291 moves in FY 14)	1,875 hours	1,830	Yes
Criteria for Portability Moves: Total time to complete the task in staff hours (decrease).	540 hours (based on FY 12 port activity)	175 hours	260	No
<i>*PHA implemented this activity in FY 2007 and does not have baseline information available for that period. Thus, the baseline reflects staff time savings already achieved. PHA has established a benchmark to continue the same or comparable level of staff time savings.</i>				

ACTIVITY 2011-1: PARTNERSHIP PROGRAMS INITIATIVE

PHA continued to utilize MTW authority to expand public housing for special needs and other targeted groups in partnership with non-profit neighborhood groups, universities, state and local government, and other stakeholders. This flexible, services-oriented model allows PHA to leverage PHA and partner resources to provide public housing options and, where appropriate and feasible, related health care, educational, and/or other necessary services to low-income families and individuals. Authorized features of this initiative include, but are not limited to, the following:

- Admissions and continued occupancy requirements for the initiative may vary from standard public housing and will be determined for each project in order to promote seamless integration of the partner's subsidy sources with MTW block grant funds.
- Partnership initiatives must serve households earning 80% of AMI or below. PHA's MTW funds may not be used to subsidize households who are not low-income.
- PHA will leverage its funds with other partner resources in order to avoid duplicative services and payments and to maximize the value of funds invested in the Partnership Initiative.
- Potential models include, but are not limited to, domiciliary care for seniors and people with disabilities; housing options for youth, including those aging out of foster care; and permanent supportive housing.
- Budgets and agreements between PHA and its partners will adjust subsidy to allow for recoupment of PHA's capital investment as fee income where financially feasible, particularly in situations in which the partner's subsidy is intended to cover all or some of the housing costs.
- While each development is expected to have different features, programmatic components may include: preferences for specific target populations, including referrals from partner agencies; program contracts for participants that may include requirements for case management, participation in services, or other requirements; time limits on housing subsidies; modified occupancy standards; availability of stipends; and other components.

Under this activity, in FY 2022, financial closings occurred for five (5) new public housing developments consisting of a total of 182 units . This includes: Allegheny West Plaza (45 units), Be A Gem Crossing (41 units), Mill Redevelopment (36 units), Rafael Porrata Doria Place (30 units) and West Mill Place (30 units). Construction completion on these sites is scheduled for FY 2023. Also in FY 2022, PHA issued a competitive RFP and selected six (6) additional public housing development proposals totaling 175 units. These additional sites are expected to close during FY 2023.

Approval and Implementation

- Approved FY 2011
- Implemented FY 2012
- Modified FY 2013 to incorporate specific components applicable to the youth aging out of foster care partnership with the Philadelphia Department of Human Services (DHS)

Hardship

Not applicable.

Actual Non-Significant Changes

There were no non-significant changes to this activity in FY 2022.

Actual Significant Changes

There were no significant changes to this activity in FY 2022.

Changes to Metrics

PHA included updated benchmarks in the FY 2022 Annual Plan to reflect projected housing production under this activity during the fiscal year.

Challenges in Achieving Benchmarks & Possible Strategies

As noted, financial closings on 5 new public housing developments occurred during the year; however, due to changes in development timetables, the units are not scheduled for completion until FY 2023.

Metrics:

<i>HC #1: Additional Units of Housing Made Available *</i>				
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	182	0	No
<i>* The HUD Standard Metrics for this activity will depend on the MTW flexibilities required and the type of service provided at each site. As additional agreements with developers and/or service providers are finalized, further HUD Standard Metrics may be added depending on the terms and necessary flexibilities of the agreements. None of the listed projects for FY 2022 require MTW waivers at present other than the use of MTW Block Grant funds</i>				
<i>CE #4: Increase in Resources Leverage – ALL Planned FY 2022 Projects **</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Amount of funds leveraged in dollars (increase).	\$0	\$76.48 million	0	No
<i>** Represents projected total development costs of each development project as reported by PHA development partners.</i>				

ACTIVITY 2016-1: SECOND CHANCE INITIATIVE

Description/Impact/Update

PHA continued to utilize MTW flexibility to support implementation of the Second Chance Initiative in the Housing Choice Voucher Program. The policy permits the provision of 10 tenant-based vouchers for active participants in good standing with two partner agencies – the Eastern District Federal Court Supervision to Aid Reentry (STAR) Program and the Mayor’s Office of Reintegration Services (RISE) Program. The STAR Program works in conjunction with Federal Probation and Parole, to offer returning citizens an opportunity to reduce their parole period by one year through participation in the Re-Entry Program. Each participant signs a contract with their parole officer to transition the oversight of their parole to the two federal judges that administer the STAR Program. The STAR Program collaborates with the local RISE Program to provide counseling, education, job training, and job placement services. In the 2017 Annual Plan, PHA indicated that placements in public housing units may be offered to Second Chance participants in good standing at PHA’s option.

Housing assistance is available to the participants for a period of up to two years, at which point the objective is for participants to transition off the program to other affordable housing. However, PHA may allow Second Chance participants to transition to the HCV or Public Housing Program to continue their tenancy.

In FY 2018, PHA entered into a new partnership with the Pennsylvania First Judicial Court’s MENTOR Program. This initiative allows 20 qualified returning citizens who are working with the MENTOR Program to move in with existing PHA public housing households, provided that the PHA household is in good standing and is willing to add a MENTOR Program participant to the lease. This will help to re-unite families, prevent homelessness and, hopefully, interrupt the cycle of recidivism. While the initiative allows for return of 20 qualified citizens, enrollment in this program is based on referrals from the MENTOR Program.

The MENTOR Program, while still active, did not receive any referrals from the Pennsylvania First Judicial Court in FY 2022. Where the goal of this initiative is to reunite families and prevent homelessness and recidivism, PHA is bound by its policies regarding program denial for certain drug and violent criminal offenses. In FY 2022, PHA engaged the First Judicial Court in discussions on the future of this partnership; PHA will include an update on its status in the FY 2023 MTW Report.

Eleven (11) participants were enrolled in the STAR Program including three (3) new participant who enrolled in the program in FY 2022. To support housing stability, two (2) participants were offered an extension of their program participation term.

The success of a FY 2022 graduate of the STAR program highlights how the range of supports offered to Second Chance participants provide critical stability during their re-entry. With these supports, this recent graduate was able to earn two promotions during his participation in the Initiative and received assistance in budgeting and building his credit. At graduation, he received a Housing Choice Voucher and was connected to PHA’s Housing Opportunity Program, where counselors assisted him in searching for and leasing an apartment in an opportunity neighborhood.

Approval and Implementation

- Approved FY 2016
- Implemented FY 2016
- Modified FY 2018

Hardship

Not applicable.

Actual Non-Significant Changes

In FY 2022, PHA amended this activity to provide for extensions to the two-year term for the STAR/RISE programs to address economic and health emergencies as declared by the Mayor or his/her designee. Extensions are granted on a case-by-case basis and evaluated based on the participant's individual circumstances which have been dictated by such declared emergency. As noted above, PHA approved two (2) participants' requests to extend their term in the program.

Actual Significant Changes

There were no significant changes to this activity in FY 2022.

Changes to Metrics

Benchmarks were updated to reflect the anticipated volume of referrals in FY 2022.

Please note that PHA received approval in the FY 2023 MTW Plan to remove the following metrics: SS #1: Increase in Household Income, SS #6: Reducing Per Unit Subsidy Costs, and SS #7: Increase in Agency Rental Revenue. PHA will begin to report on the revised metrics for this activity in the FY 2023 MTW Report.

Challenges in Achieving Benchmarks & Possible Strategies

PHA relies on referrals from partnering agencies to provide housing assistance to eligible participants; in FY 2022, PHA did not receive any eligible referrals for the MENTOR program. As a result, benchmarks associated with leveraged resources were not met.

Additionally, PHA did not meet benchmarks for job training and education; however, employment exceeded the benchmark. Unemployed participants received support for job placement after experiencing job losses. PHA also provided extensions to two (2) participants, and was not able to meet the benchmark for program graduation as a result.

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	Up to \$10,000	\$4,400	No
<i>*Participation is not mandatory and is based on the needs of the individual. Leveraged resources reflect activity in the STAR and RISE programs only.</i>				

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	10	11	Yes

**10 represent the STAR/RISE programs. Mentor program referrals cannot be forecasted.*

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).	\$18,200 average earned income of participants	\$13,000	\$17,444	Yes

SS #3: Increase in Positive Outcomes in Employment Status *

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Employed Full-Time*	10 participants	6	7	Yes
	100% of participants	60%	64%	
Enrolled in a Job Training Program	0 participants	2	1	No
	0% of participants	20%	9%	
Enrolled in an Education Program	0 participants	2	0	No
	0% of participants	20%	0%	

**Represents participants in the STAR and RISE programs only. All participants in the RISE and STAR programs are required to be employed and maintain employment as a condition of participation; however, in the event they lose employment, they will be required to either obtain a new job or enroll in an educational or job training program as a condition of participation.*

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	0	0	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	10	11	Yes

SS #6: Reducing Per Unit Subsidy Costs for Participating Households *

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average amount of Section 8 and/or 9 subsidy per household affected by this policy in dollars (decrease).	\$430 upon implementation (2 participants)	\$750	\$762	No

** Represents STAR and RISE program participants only.*

SS #7: Increase in Agency Rental Revenue *

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
PHA rental revenue in dollars (increase).	\$439	\$215	\$399	Yes

**PHA does not have any rental revenue as all participants are in the HCV program. Total Tenant Payment is the metric. Represents STAR and RISE program participants only.*

SS #8: Households Transitioned to Self Sufficiency *

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self-sufficiency (increase).	0	2	1	No

**For this program purpose, PHA defines "self-sufficiency" as successfully completing the program and transitioning to other affordable housing. Represents STAR and RISE program participants only.*

ACTIVITY 2019-1: OPENING DOORS TO AFFORDABLE HOMEOWNERSHIP

Description/Impact/Update

PHA continued to utilize MTW Block Grant funding and programmatic flexibility to expand first-time affordable homeownership initiatives to increase housing choice and the number of first time, low-income homebuyers. The program builds on the existing framework and consolidates PHA's existing HUD-approved 5h Homeownership Program, HCV Homeownership Program, other new development homeownership initiatives and homeownership readiness and counseling support under the management of PHA's Homeownership Department. Further, this activity expands PHA's existing programs to incorporate new types of assistance including lease-purchase and down payment assistance options.

Under the existing 5h Program, PHA assists current public housing residents of scattered site units to purchase their own units; however, the program is limited to current residents of the unit, and does not incorporate post-purchase voucher assistance. Under the existing HCV Homeownership program, current voucher participants may utilize their voucher assistance to purchase homes and then receive monthly Housing Assistance Payments to support housing costs for up to a fifteen (15) or thirty (30) year period.

The MTW Opening Doors to Affordable Homeownership Program (ODAHP) consolidates, streamlines and enhances these existing initiatives while modifying eligibility and post-purchase support criteria and adding new financing support mechanisms. Key features of the program include:

Program Components

ODAHP participants work with PHA's Homeownership Department to review their financial status, credit standing and household goals. Participants are required to meet all eligibility requirements, including successful completion of approved homeownership counseling and financial literacy courses. Financing options available to program participants include:

- *Monthly voucher assistance:* Households may receive monthly Housing Assistance Payments assistance for up to 15 or 30 years. Generally, this assistance will cover the difference between up to 28% of adjusted household income and the projected monthly homeownership costs, subject to a cap that is equal to PHA's voucher payment standard. PHA's rent simplification policies will be utilized to calculate household adjusted income and tenant monthly payments. Households will be recertified on a biennial basis per PHA's existing policy. Per PHA's MTW policy, assistance will be ended 180 days after a household income rises such that the PHA subsidy equals \$50 or less. Monthly voucher assistance may be used for private market units as well as for PHA scattered site units following sale. However, PHA will record a soft second mortgage on the title with a 15 or 30-year period, which is related to the voucher assistance term. In the event of a default, PHA will receive notification and attempt to work with the household to develop a financial workout plan to avoid foreclosure.
- *Down payment assistance:* In lieu of receiving monthly voucher assistance, ODAHP participants will be eligible for one-time down payment assistance up to a maximum of

\$15,000 per household. Participants receiving down payment assistance will not be recertified. However, PHA will record a soft second mortgage on the title with a 20-year recapture period. In the event of a default, PHA will receive notification and attempt to work with the household to develop a financial workout plan to avoid foreclosure. If the default is not cured, PHA will recoup the down payment assistance amount, which will decrease 5% annually over the 20-year term.

- *Soft second mortgage option:* Up to a maximum of \$50,000 per household may be provided as a soft second mortgage, provided that the household is not receiving other PHA homeownership assistance. Participants receiving this assistance will not be recertified. However, PHA will record a soft second mortgage on the title with a 20-year recapture period. In the event of a default, PHA will receive notification and attempt to work with the household to develop a financial workout plan to avoid foreclosure. If the default is not cured, PHA will recoup the soft second mortgage amount, which will decrease 5% annually over the 20-year term.
- *Lease to purchase option:* PHA plans to implement lease to purchase options that can be implemented in private market rentals and scattered sites that are still part of PHA's public housing inventory. A portion of the tenant rent will be escrowed during the lease to purchase period and then applied to the down payment at the time of purchase. Lease to purchase participants will be recertified per PHA's existing policy.

As with the 5h Program, all scattered site units are eligible for sale to ODAHP participants without requiring additional HUD disposition approval.

For the down payment assistance and soft second programs, PHA has established reasonable maximum limits of \$15,000 and \$50,000. These amounts were determined based on PHA's internal assessment of the level of assistance needed to ensure successful first time homeownership among current program participants given current Philadelphia housing market conditions. Note, however, that PHA will authorize only the minimum amount needed to close the affordability gap based on individual household circumstances. PHA will calculate the maximum mortgage payment allowed at 35% of adjusted monthly income, and total housing expenses at 38% of adjusted monthly income. The amount of down payment or soft second assistance to be provided by PHA will be calculated by PHA's Homeownership Opportunities Department staff based on a complete review of household finances. As part of this review, PHA staff will work to maximize household eligibility for any other non-PHA down-payment and/or closing cost assistance programs.

PHA budgets approximately \$1.5 million in MTW Block Grant funds yearly to support the program. The number of households served varies, depending on the mix of financing options utilized by participants. If demand exceeds available budget, PHA will establish a wait list based on date and time of application.

To date, PHA has assisted over 1,000 families in purchasing their first home. In FY 2022, 94 families were able to purchase a home through the ODAHP program in FY 2022, including:

- 28 families who purchased a home through the HCV Homeownership program

- 13 families who purchased a home through the Public Housing 5(h) program
- 53 families who purchased a home through the new Public Housing Mobility program, with down payment or soft second mortgage assistance, or other homeownership assistance provided through ODAHP's non-profit and City partners

In FY 2022, PHA expanded affordable homeownership opportunities available to PHA and other low income families as part of the Choice Neighborhoods Transformation Plans for Norris/North Central and Sharswood/Blumberg, completing construction of 30 homeownership units at Norris and nearing completion of an additional 20 affordable homeownership units at Sharswood.

To further equitable development efforts, PHA engaged new partners in a new initiative to support local aspiring developers and renovate 53 vacant and distressed scattered sites units. In partnership with Jumpstart Philly, developers received training, mentoring, networking, and financial resources to renovate these units, which are sold to households at or below 80% AMI. ODAHP participants have the first opportunity to purchase renovated scattered site units. During the fiscal year, a former HCV participant and current Jumpstart participant received credit and housing counseling and was able to purchase a rehab property with additional assistance provided by PhillySEEDS for her closing costs.

A recent graduate's success story highlights how ODAHP and its partner programs within Resident Programs and Partnerships (RPP) provide wraparound services to help PHA families achieve both near and long-term goals. A recent ODAHP graduate was able to purchase the scattered site home that his family had leased from PHA for over 50 years. The graduate's mother moved in 1968 and began creating decades of memories there with her family. After falling ill in 2012, she expressed her wish for her children to purchase their family home. To prepare for homeownership, RPP provided her son support for improving his finances, receiving skilled trades training and certifications to secure a better paying job, and preparing to purchase a home through credit and homeownership counseling. In addition to these services, the graduate was also connected to financial support for his mortgage closing costs through PhillySEEDS. With this support, he was able to fulfill his mother's (and his) dream of owning their family home.

Approval and Implementation

- Approved FY 2019
- Implemented FY 2019

Hardship

Not applicable.

Actual Non-Significant Changes

Under the existing activity, PHA may dispose of scattered site PH units to eligible PH residents and HCV participants for first time homeownership upon HUD approval of the disposition. In FY 2022, PHA received approval to leverage the Federal Housing Administration's 203(k) Rehabilitation program to encourage eligible residents to purchase and rehabilitate selected scattered site units. The Section 203(k) program is an important tool for community and neighborhood revitalization, as well as expanding homeownership opportunities.

With a Section 203(k) insured loan, PH residents and HCV participants will be able to finance the rehabilitation of the unit. Residents who finance through a Section 203(k) insured loan will also be eligible for PHA’s down payment assistance and soft second mortgage option. PHA will qualify and connect residents with MBE/WBE contractors as well as resident-owned contracting companies to facilitate the rehabilitation. During the period of rehabilitation, HCV and PH participants will continue to receive assistance in their existing (non-homeownership) PH or HCV units until rehabilitation work is complete and the homeownership unit is ready for move-in.

Actual Significant Changes

There were no significant changes to this activity in FY 2022.

Changes to Metrics

No changes were made to the baseline or benchmarks listed in the FY 2022 Annual Plan.

Challenges in Achieving Benchmarks & Possible Strategies

PHA met all FY 2022 benchmarks.

Metrics:

<i>HC #6: Increase in Homeownership Opportunities</i>				
Unit of Measurement	Baseline	Benchmark	Outcome*	Benchmark Achieved?
Number of households that purchased a home as a result of this activity (increase).	0	60	94	Yes
<i>* Includes HCV participant and PH residents who were able to purchase a home through one or more of the assistance programs under this activity.</i>				
<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	60	94	Yes

ACTIVITY 2019-2: SHARSWOOD YOUTH & FAMILY ENRICHMENT SERVICES

Description/Impact/Update

PHA continued to utilize MTW Block Grant funding flexibility to support after school programs designed to help improve educational outcomes and high school graduation rates for PHA youth and other low-income youth living in the Sharswood/Blumberg neighborhood of Philadelphia. This activity also provides partial funding for case management for youth and their families to help overcome barriers to educational success and to access community resources to address family supportive service needs.

As part of the comprehensive neighborhood transformation strategy for the former Blumberg public housing development and the surrounding Sharswood community, PHA provides \$500 per student per year in MTW Block Grant funds to support after school, extracurricular, and enrichment programs as well as case management services for youth in grades 9-12 in coordination with the neighborhood school. Established in September 2017, the school is operated by Big Picture Schools Philadelphia (BPSP) and located in the Vaux Community Building. BPSP works to engage students in learning and internship opportunities to encourage career exploration and progression to higher educations. The Vaux Community Building, a key part of the Choice Neighborhood Transformation Plan, serves as a focal point and anchor for the revitalized community, with on-site facilities for educational, health care and other supportive services. Such services are intended to complement each other and address a full range of family needs. PHA's Vaux Community Building was designated by HUD as an EnVision Center.

This MTW activity provides partial funding of BPSP's after school programs including homework assistance, sports activities, robotics, music production, computer refurbishing and other education-related activities. Partial funding is also provided for case management support to youth and their families through BPSP's Resilience Specialist. The Resilience Specialist provides one-on-one and group counseling to students and their families, with the goal of identifying and removing barriers to educational success and family stability.

PHA shares BPSP's goal of helping PHA and other low-income youth to exceed citywide educational metrics, and to graduate and move onto higher education and meaningful careers. While the primary beneficiaries of the services provided by BPSP are members of PHA resident households, including residents of public housing and the Housing Choice Voucher (HCV) program, other low-income neighborhood youth are also served.

In FY 2022, PHA continued to work towards its goal to improve educational outcomes as part of the comprehensive Choice Neighborhoods Transformation Plan for Blumberg-Sharswood. PHA provided \$166,000 in MTW Block Grant funds to support after school, enrichment, and extracurricular programming and provide case management to families to address supportive service needs.

Big Picture High School celebrated its first graduating class of 96 students in FY 2022. The graduation rate of the senior class was 95%, and included 26 graduates who started at four-year colleges and five (5) who enrolled at the Community College of Philadelphia. Many of these graduates were able to earn college credit while attending BPHS. Other members of the graduating class went on to begin working, attend industry focused higher education programs and enlist in the military.

Approval and Implementation

- Approved FY 2019
- Implemented FY 2019

Hardship

Not applicable.

Actual Non-Significant Changes

There were no non-significant changes to this activity in FY 2022.

Actual Significant Changes

There were no significant changes to this activity in FY 2022.

Changes to Metrics

No changes were made to the baseline or benchmarks listed in the FY 2022 Annual Plan.

Challenges in Achieving Benchmarks & Possible Strategies

PHA did not meet the benchmark for households assisted, as enrollment at the Vaux Big Picture High School declined in the 2021-2022 school year.

Metrics:

<i>SS #5: Households Assisted by Services that Increase Self-Sufficiency</i>				
Unit of Measurement	Baseline	Benchmark	Outcome*	Benchmark Achieved?
Number of households receiving services aimed to increase self-sufficiency (increase).	0	504	332	No

** Programs and case management services are made available to both PHA residents and youth from the surrounding Sharswood/Blumberg neighborhood who attend Vaux Big Picture High School.*

ACTIVITY 2020-1: LOCAL FAMILY SELF-SUFFICIENCY PROGRAM FLEXIBILITY

Description/Impact/Update

PHA continued to implement a local Family Self-Sufficiency (FSS) Program to encourage more residents to participate in the program. Under this MTW activity, PHA has eliminated the current regulatory requirement that FSS participants must have an interim or regular recertification within 120 days prior to enrollment in the FSS program. PHA utilizes the last interim or regular recertification prior to enrollment as the basis for FSS escrow calculations.

In FY 2021, PHA modified this activity in order to redefine the employment obligation and allow any other adult in the household to seek and maintain suitable employment during the term of the contract and any extension thereof, if the head of an FSS household is elderly or disabled. Without this MTW flexibility, suitable employment must be maintained by the head of household. This change provides families, where the head of household is elderly or disabled, with incentive to participate in FSS and derive benefit from the supportive services and escrow accumulations, while maintaining the requirement for employment within the household.

In FY 2022, 122 new families enrolled in FSS, resulting in a total enrollment of 1,411 families into the MTW local FSS Program.

A recent graduate's story highlights the success of the local FSS program. Enrolling in FSS in 2019, a recent graduate's goal was to purchase the scattered site home she had leased for nearly 20 years. FSS counselors helped her create a budget to reduce her debt, improve her credit score by 111 points, and grow her savings by \$4,700. With mortgage closing cost assistance from Philly SEEDS, she was finally able to purchase her home.

Families participating in the FSS program were able to pursue their passions and increase their income with support from the program. One participant started her own business and has become so successful that she is now a supplier for other businesses across the county. Her FSS counselor connected her to entrepreneurship programs for business and finance training to help her business continue to grow. Another participant was able to secure a new, better paying job at a hospital and increase her escrow savings, which she used to purchase her own car.

Approval and Implementation

- Approved FY 2020
- Implemented FY 2020

Hardship

Not applicable.

Actual Non-Significant Changes

There were no non-significant changes to this activity in FY 2022.

Actual Significant Changes

There were no significant changes to this activity in FY 2022.

Changes to Metrics

Benchmarks were updated to reflect the increase in participation that PHA anticipates for the MTW FSS program in FY 2022.

Please note that PHA received approval in the FY 2023 MTW Plan to remove the following metrics: SS #6: Reducing Per Unit Subsidy Cost and SS #7: Increase in Agency Rental Revenue. PHA will begin to report on the revised metrics for this activity in the FY 2023 MTW Report.

Challenges in Achieving Benchmarks & Possible Strategies

PHA did not meet the benchmark for average earned income for PH households participating in FSS; however, PHA did meet benchmarks related to employment rate. PHA also did not meet the benchmark for total HAP subsidy, as a result of the increase in the number of HCV families participating in the FSS 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).	HCV: \$21,099 PH: \$27,049	HCV: \$23,499 PH: \$29,449	HCV: \$27,376 PH: \$28,610	HCV: Yes PH: No
<i>* Baseline is based on March 2019 average earned income of PHA households with earned income.</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	\$0	\$990	HCV: \$3,361 PH: \$3,751	Yes
<i>* Outcome represents the average escrow balance of FSS participants that have established an escrow savings. Baseline is 0 because participants do not have escrow account balances at the date of enrollment.</i>				
SS #3: Increase in Positive Outcomes in Employment Status*				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Unemployed	108 (72%)	248 (62%)	795 (56%)	Yes
Employed	42 (28%)	152 (38%)	616 (44%)	Yes
Enrolled in Education	0	24 (6%)	114 (8%)	Yes
Enrolled in Job Training	0	52 (13%)	27 (2%)	No
<i>* Baselines for unemployed and employed were based on PHA-wide average percentages, and then applied to the 150 participants PHA had anticipated for FY 2020, the initial year of this activity. Benchmarks have been adjusted to reflect that PHA anticipates 400 participants in FY 2022. Baselines and benchmarks may be adjusted at a later date to reflect employment status at enrollment of participants affected by this activity.</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)	17 (11.6%)	46 (11.6%)	77 (5%)	Yes

** The baseline for households receiving TANF was based on PHA-wide average percentage, and then applied to the 150 participants PHA had anticipated for FY 2020, the initial year of this activity. The benchmark has been adjusted to reflect that PHA anticipates 400 participants in FY 2022. Baseline and benchmarks may be adjusted at a later date to reflect employment status at enrollment of participants affected by this activity.*

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	400	1,411	Yes

SS #6: Reducing Per Unit Subsidy Cost for Participating Households*

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total amount of Section 8 and/or 9 subsidy (or local non-traditional subsidy) per household affected by this policy in dollars (decrease).	\$1,321,200	\$3,235,200	\$8,968,428	No

** Baseline is the PHA average HAP of \$734 multiplied by 12 months for 150 participants. Benchmark is based on a projected decrease in the PHA average HAP to \$674 multiplied by 12 months for 400 participants. Baseline and benchmark may be adjusted at later date to reflect subsidy amount at enrollment of participants affected by this activity. PHA notes that this metric does not account for the fact that subsidy costs may rise even while tenant incomes increase as a result, for example, of increases to rents to owners.*

SS #7: Increase in Agency Rental Revenue*

Unit of Measurement	Baseline	Benchmark	Outcome**	Benchmark Achieved?
Total household contributions towards housing assistance (increase).	\$556,200	\$1,771,200	\$1,816,044	Yes

** PHA uses Total Tenant Payment (TTP) as the household contribution toward housing assistance. Baseline is the PHA average TTP of \$309 per month multiplied by 12 months for projected 150 participants. Benchmark is based on projected increase in TTP of \$60 per month participant using projected \$2400 average increase in earned income. Baseline and benchmark may be adjusted at later date to reflect actual TTP at enrollment of participants affected by this activity. PHA notes that this metric does not account for the fact that PHA will pay out escrow savings accounts for FSS program graduates.*
*** TTP for PH FSS households only; HCV owners receive the tenant rent portion from HCV FSS households*

SS #8: Households Transitioned to Self-Sufficiency *

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self-sufficiency (increase).	0	0	0	Yes

** Metric applies to participants who enroll in FSS after approval of this MTW Activity. PHA defines self-sufficiency as graduation from FSS, a five-year program. No graduations are expected this year.*

ACTIVITY 2020-2: SPONSOR-BASED SHARED HOUSING PILOT

Description/Impact/Update

PHA has begun to implement a pilot program to expand housing options for homeless individuals and other hard to serve special populations. It builds on and enhances the ongoing collaboration between the City and PHA to reduce homelessness through the “Blueprint to End Homelessness” initiative. The pilot program was initially limited to up to twenty-five (25) units; however, PHA has increased this to thirty-eight (38) units and may further expand based on demand and the lessons learned from initial implementation. As the program uses a shared housing model, the projected number of individual, low-income households to be served is up to four times the number of units. The elements of the pilot program include:

- Using grant funding provided by the City to leverage MTW funds, PHA will rehabilitate existing vacant and uninhabitable scattered site public housing units. Units will generally be large-bedroom sizes with 3+ bedrooms per unit. No liens will be placed on the properties.
- PHA will enter into a master lease for one or more of the rehabilitated units with the City and/or qualified local, non-profit provider(s) that serves formerly homeless individuals and/or other hard to serve populations, i.e. youth aging out of foster care, chronically homeless, victims of domestic violence, etc.
- PHA does not intend to mix different target populations within the same unit. Supportive services will be offered directly and/or through referrals based on the needs and priorities of the resident population served, which may include case management, behavioral health services, preventive health care, adult education, employment and training, and/or other services.
- Under the terms of the master lease, the City and/or designated provider(s) (“Sponsor Agency”) will pay a flat rent to PHA. PHA will not collect or receive rents from individual tenants. The Sponsor Agency(s) will be allowed to sublease individual rooms within the unit to eligible, low-income individuals. The Sponsor Agency(s) will provide a shared housing model and supportive services to program participants and will: screen and determine eligibility of participants; maintain a waiting list if needed; implement a rent policy by which participants will pay no more than 30% of income for rent; enter into sublease agreements with participants; collect rents; and, develop and enforce house rules. PHA does not anticipate that on-site staffing will be required.
- Participants in this pilot program will not be considered public housing residents, and will not have the responsibilities and rights associated with PHA public housing resident households. PHA will request HUD approval to classify the units covered under master lease as “MTW Neighborhood Services” units in accordance with PIH 2011-7. PHA will then report on households served through the MTW 50058 form. PHA’s understanding is that each occupied unit will count as one household for MTW purposes, irrespective of the number of individuals sharing the unit.

- Participants will not be subject to PHA’s Admissions and Continued Occupancy Policies including, but not limited to, those related to Eligibility Determination, Continued Occupancy, Transfers, Informal Hearings or Grievance Hearings. However, participants will be subject to admissions and continued occupancy policies established by the City or qualified, local non-provider with whom PHA has entered into a master lease.
- Participants will not enter into lease agreements with PHA and will not pay rent to PHA. They will not be subject to public housing Community Service requirements.
- Lease enforcement (up to and including evictions), house rules enforcement, rent collection and other property management activities will be the responsibility of the City or qualified local, non-profit provider with whom PHA has entered into a master lease.
- PHA will ensure that all units meet UPCS standards at initial inspection. PHA’s role will be to prepare the unit for initial occupancy and perform routine and emergency maintenance services.
- The City and/or Sponsor Agency(s) will provide PHA with quarterly reports that provide basic data on program participants including household income, dates of occupancy, supportive services provided, outcomes achieved and other required information.

In FY 2022, thirty-three (33) units were occupied under the pilot program with the City of Philadelphia, serving 79 participants. PHA anticipates that the units made available under this pilot will be fully leased in FY 2023.

In addition to the partnership with the City, PHA has collaborated with the Community College of Philadelphia to serve low-income, at-risk CCP students. As noted in the FY 2023 MTW Plan, PHA may elect to assume additional roles and responsibilities related to the pilot with CCP. Discussions regarding roles and responsibilities are on-going as PHA and CCP work to refine the management model for this site. In the interim period, PHA is providing direct property management service while working collaboratively to develop a long-term operational plan. In FY 2022, three (3) units were occupied under the pilot program with CCP, providing housing to seven (7) CCP students.

Approval and Implementation

- Approved FY 2020
- Implemented FY 2020

Hardship

Not applicable.

Actual Non-Significant Changes

PHA increased the number of units in the pilot program to 38 (35 with City and 3 with CCP).

Actual Significant Changes

There were no significant changes to this activity in FY 2022.

Changes to Metrics

No changes were made to the metrics in the FY 2022 Annual Plan.

Challenges in Achieving Benchmarks & Possible Strategies

PHA did not meet the benchmarks below; however, it is anticipated that units made available under the pilot with the City will be fully leased in FY 2023.

Metrics:

<i>HC #1: Additional Units of Housing Made Available</i>				
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	38	36	No
<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 (increase).	0	38	36	No

ACTIVITY 2022-1: EMERGENCY WAIVERS

Description/Impact/Update

PHA uses MTW flexibility to establish emergency waivers during economic and health related emergencies and natural disasters as declared by the Mayor or his/her designee. This activity allows PHA to waive and/or adopt alternative requirements should they be needed in order to relieve burdens on all stakeholders, including low-income families participating in PHA's Public Housing and HCV programs.

- **Delayed Reexaminations:** PHA may waive the requirement to conduct a reexamination of family income and composition at least annually. Currently PHA completes reexaminations on a biennial basis for Public Housing (PH) and Housing Choice Voucher (HCV) program households and on a triennial basis for PH households on ceiling rents and PH and HCV elderly/disabled households on fixed incomes. Where reexaminations have been delayed, PHA will complete the reexamination no later than the anniversary month of the following year. The next reexamination will be scheduled on the same anniversary month using the applicable reexam frequency for the family. For example, if a biennial reexam was due on July 2020, PHA would complete the reexam by July 2021. The next scheduled biennial reexam would take place in July 2023. This waiver applies to the PH and HCV programs.
- **Verification of Income:** PHA may waive the requirements of the verification hierarchy and continue to use Enterprise Income Verification (EIV) to confirm tenant income at both interim and regular recertifications, unless specifically waived by HUD. This waiver applies to the PH and HCV programs.
- **Increase in Payment Standard:** PHA may 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, PHA will apply the increased payment standard at the next interim reexamination after the effective date of the increased payment standard. If PHA completes a reexam late, PHA will apply the payment standard in effect on the effective date of the delayed regular reexamination. This waiver applies to the HCV program.
- **Delayed Regular HQS Inspections:** PHA may waive the requirement for completion of regular HQS inspections at least biennially. Where a regular HQS inspection has been delayed, PHA will complete the HQS inspection no later than the anniversary month of the following year. The next HQS inspection will be scheduled on the same anniversary month using the applicable inspection frequency for the unit. For example, if an HQS inspection was due on July 2020, PHA would complete the inspection by July 2021. The next scheduled annual HQS inspection would take place in July 2022. PHA will continue to request a self-certification from the owner that no life threatening conditions exist in the unit. Additionally, PHA will continue to conduct complaint inspections. This waiver applies to the HCV program.

- **Interim HQS Inspections:** PHA may waive the requirement to conduct re-inspections to confirm repair; however, PHA 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 PHA notification. This waiver applies to the HCV program.
- **HQS QC Inspections:** PHA may waive the requirement to conduct HQS quality control inspections and instead will suspend HQS quality control inspections until the emergency waiver has been lifted. This waiver applies to the HCV program.
- **Homeownership HQS:** PHA may waive the requirement for the initial HQS inspection for homeownership units; however, an independent professional inspection will still be required. This waiver applies to the HCV Homeownership Program.
- **Delayed PH Annual Self-Inspection:** PHA may waive the requirement to complete annual self-inspections of PH units. PHA will continue to respond to and address serious conditions that could jeopardize life or property. When the waiver is lifted, PHA will resume self-inspections beginning with the units which were inspected on the oldest date. This waiver applies to the PH program.
- **FSS Contract of Participation:** PHA may waive the requirement regarding the maximum extension of an FSS Contract of Participation (COP). During periods of declared emergency, PHA 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, PHA may extend their COP beyond the two year extension threshold. This waiver applies to the PH and HCV FSS program.

In FY 2022, the HCV program applied Emergency Waivers related to delayed recertifications, waiver of the verification hierarchy, delayed biennial inspections, waiver/alternative requirements related to re-inspection, and the waiver of the HQS QC inspections requirement.

Approval and Implementation

- Approved FY 2022
- Implemented FY 2022

Hardship

Not applicable.

Actual Non-Significant Changes

There were no non-significant changes to this activity in FY 2022.

Actual Significant Changes

There were no significant changes to this activity in FY 2022.

Changes to Metrics

No changes were made to the metrics in the FY 2022 Annual Plan.

Please note that PHA received approval in the FY 2023 MTW Plan to remove the CE #1: Agency Cost Savings. PHA will begin to report on the revised metrics for this activity in the FY 2023 MTW Report.

Challenges in Achieving Benchmarks & Possible Strategies

PHA did not meet benchmarks related to Agency Cost and Staff Time Savings; however, the flexibilities related to verification of income provided through this activity resulted in significant time savings per re-examination.

Metrics

<i>CE #1: Agency Cost Savings *</i>				
Unit of Measurement	Baseline*	Benchmark*	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease)	\$675,319	\$337,674	\$563,514	No
<i>*The baseline reflects the cost of completion of all PH and HCV regular reexaminations for a one year period. The benchmark reflects the cost of completion of one half the number of PH and HCV regular reexaminations in a one year period.</i>				
<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).	22,761 Hours	11,381 hours	18,290 hours	No
<i>**The baseline reflects the time expended on all PH and HCV regular reexaminations for a one year period. The benchmark reflects the time expended for one half the number of PH and HCV regular reexaminations in a one year period.</i>				

B. Activities Not Yet Implemented

ACTIVITY 2014-1: FLEXIBLE SUBSIDY INITIATIVE

Description/Update

The Flexible Subsidy Initiative provides PHA with the flexibility, subject to HUD approval, to establish operating subsidy levels for newly constructed public housing units, which blend MTW Block Grant funds (HAP and Operating Fund). This activity was approved by HUD in FY2014. PHA has not utilized this flexibility to date; however, it may be utilized, subject to HUD approval, in future transactions.

ACTIVITY 2021-1: LIMITED PILOT - MTW CONTINUED OCCUPANCY POLICY

Description/Update

The Limited Pilot program allows PHA to establish an MTW policy to require non-elderly, non-disabled adults to complete at least 20 hours of work per week or participate in an approved education or job training program as a condition of continued occupancy. This activity was approved by HUD in FY 2021; however, PHA temporarily suspended planning for implementation of this activity in light of the economic dislocation caused by the pandemic. PHA will continue to monitor economic conditions in FY 2023 to determine the appropriate timing for implementation.

C. Activities on Hold

Not applicable.

D. Closed Out Activities

The following table summarizes previously approved MTW activities that PHA has completed, discontinued, or determined that the activity no longer requires MTW authority to implement.

Table 20: Closed Out MTW Activities

Activity	Plan Year	Close Out Year	Reason for Close Out
Assisted Living	FY 2009	FY 2011	PHA discontinued this activity prior to its implementation based on a determination that sufficient funding was not available from state, federal and other required sources.
Home Care Services	FY 2009	FY 2011	PHA discontinued this activity prior to its implementation based on a determination that services can be delivered more efficiently through third-party partners.
Scattered Site Income Tiering	FY 2011	FY 2011	PHA discontinued this activity prior to its implementation based on decisions made as part of the scattered site asset repositioning initiative including disposition and auction of vacant and obsolete properties.
HCV Time Limit	FY 2004	FY 2012	PHA discontinued this activity due to economic conditions, which limited the availability of jobs for residents.
HCV HQS Enforcement	FY 2004	FY 2012	PHA discontinued this policy based on a decision to establish uniform HQS enforcement policies for both MTW and Non-MTW vouchers.
Public Housing Service Order Policy	FY 2004	FY 2012	PHA discontinued this policy after discussions with the HUD Field Office concerning the need to expedite service order response times.
Tenant Responsibility Training	FY 2004	FY 2013	PHA determined that this activity does not require MTW flexibility to implement.
Blueprint	FY 2004	FY 2013	PHA continues to implement the Blueprint Program; however, a determination was made that the activity does not require MTW flexibility.
Transitional Housing Facilities	FY 2007	FY 2013	PHA determined that comparable activities are authorized under Partnership Initiative.
LIFE Program	FY 2007	FY 2013	PHA determined that this activity does not require MTW programmatic waivers or Block Grant funding.
Community Service Policy	FY 2011	FY 2013	PHA determined that this activity does not require MTW flexibility.
Expanding Use of LIHTC	FY 2011	FY 2013	PHA determined that the proposed activities were covered under Partnership and Unit-Based Leasing/Development Initiatives.
Family Economic Development Action Plan/Tenant Responsibility Training	FY 2004	FY 2014	PHA discontinued this activity along with discontinuation of HCV time limits, as they were interrelated activities. No additional statutory exceptions outside of the current MTW flexibilities were considered.
Comprehensive Resident Self Sufficiency Services	FY 2005	FY 2014	PHA continues to provide comprehensive resident self-sufficiency services utilizing MTW Block Grant funds. However, MTW

Activity	Plan Year	Close Out Year	Reason for Close Out
			programmatic waivers are not required. These activities are now referenced in Chapter V under the Single Fund Flexibility section.
90 Day Voucher Reissuance Policy	FY 2005	FY 2014	PHA discontinued this policy based on an assessment that it would not contribute to PHA's utilization goals.
Accessible Unit Retrofitting and Development	FY 2010	FY 2014	PHA has completed the accessible unit retrofitting under Attachment E of the MTW Agreement. PHA will continue to develop accessible units as part of its revitalization programs; however, this activity does not require specific MTW waivers
Moving to Work Family Agreement Addendum	FY 2004	FY 2016	PHA elected not to utilize this Agreement and instead provides a Family Responsibilities form to each household at each regular recertification.
\$20 Minimum Threshold for Utility Allowance Reimbursements	FY 2009	FY 2016	PHA elected not to establish a minimum threshold of \$20 for payment of utility allowance payments.
Adult Day Care	FY 2011	FY 2017	PHA transitioned the program to a qualified third party provider, and does not provide MTW funding or utilize MTW waivers to support the activity.

V. SOURCES AND USES OF MTW FUNDS

A. Actual Sources and Uses of MTW Funds

i. Actual Sources of MTW Funds

As required, PHA submits unaudited and audited information in the prescribed Financial Data Schedule (FDS) format through the HUD Financial Assessment System. For informational purposes, the FDS for FY 2022 is shown below.

Sources		
FDS Line Item	FDS Line Item Name	Actual
70500 (70300+70400)	Total Tenant Revenue	\$28,688,912
70600	HUD PHA Operating Grants*	\$392,617,758
70610	Capital Grants	\$45,939,254
70700 (70710+70720+70730+70740+70750)	Total Fee Revenue	\$0
71100+72000	Interest Income	\$451,273
71600	Gain or Loss on Sale of Capital Assets	\$2,644,203
71200+71300+71310+71400+71500	Other Income	\$4,626,893
70000	Total Revenue	\$474,968,293

ii. Actual Uses of MTW Funds

Uses		
FDS Line Item	FDS Line Item Name	Actual
91000 (91100+91200+91400+91500+91600+91700+91800+91900)	Total Operating – Administrative	\$58,192,387
91300+91310+92000	Management Fee Expense	\$0
91810	Allocated Overhead	\$0
92500(92100+92200+92300+92400)	Total Tenant Services	\$3,072,331
93000 (93100+93600+93200+93300+93400+93800)	Total Utilities	\$22,102,904
93500+93700	Labor	\$0
94000 (94100+94200+94300+94500)	Total Ordinary Maintenance	\$65,490,596
95000 (95100+95200+95300+95500)	Total Protective Services	\$8,477,590

Uses		
FDS Line Item	FDS Line Item Name	Actual
96100 (96110+96120+96130+96140)	Total Insurance Premiums	\$11,683,966
96000 (96200+96210+96300+96400+96500+96600+96800)	Total Other General Expenses	\$19,685,601
96700 (96710+96720+96730)	Total Interest Expense and Amortization Cost	\$325,758
97100+97200	Total Extraordinary Maintenance	\$909,657
97300+97350	Housing Assistance Payments + HAP Portability-In	\$155,580,931
97400	Depreciation Expense	\$27,394,355
97500+97600+97700+97800 *	All Other Expenses - Capital & Development	\$49,702,929
90000	Total Expenses	\$422,619,005
Sources greater than / (less than) Uses		\$52,349,288

PHA plans to utilize existing reserves to fund the capital investment and affordable housing development programs noted in the MTW Annual Plan and other authorized MTW activities.

iii. Describe Actual Use of Single Fund Flexibility

Sources of Funds:

During FY 2022, most of PHA’s funding came from HUD in the form of Housing Choice Voucher Funds, Public Housing Operating Subsidy, and Capital Fund grants totaling \$438.6 million. PHA also received \$28.7 million in tenant revenues.

Uses of Funds:

- PHA continued to increase affordable housing opportunities for low-income families, providing approximately \$155.6 million in housing assistance payments (HAP) for the tenant based and project-based programs under the Housing Choice Voucher (HCV) program. PHA also provided \$18.2 million for operating cost associated with the mixed finance communities.
- PHA expended \$58.2 million in Administrative Expenses, which includes administrative salaries, employee benefits, and office expenses. Additionally, this expense includes MTW initiated Tenant Services - Family Programs, and management efficiencies. See narrative below for a summary of resident services initiatives in FY 2022 including MTW and Non-MTW funded initiatives.
- Maintenance Expenses for PHA’s developments and scattered sites totaled \$65.5 million,

and includes labor and materials, contracts for Heating and Cooling, and other contracts to ensure routine and emergency issues are addressed timely.

- PHA invested \$8.4 million in Protective Services to ensure continued quality of life for our residents. This expense includes labor, materials, and employee benefits.

Furthermore, during this period, PHA embarked on some other note-worthy activities:

1. Rehabilitation of 28 scattered sites units in FY2022 through in-house modernization. These activities amounted to approximately \$4.7 million.
2. Embarked on the Sharswood North Lot Project, which includes a new shopping center, grocery store and 100 new affordable housing units. To date, PHA has invested \$22.5 million of the \$25 million committed to this project.
3. Added new ACC and RAD deals which include HUD sources, low-income tax credits and mortgages (RAD). PHA has expended about \$20.5 million on these activities.

Use of Funds for Resident Services Programs

In FY 2022, MTW funding flexibility allowed PHA to leverage partner resources to significantly increase the reach of services and support provided by Resident Programs & Partnerships (RPP) and develop mutual and impactful partnerships. Through MTW Block Grant funds, PHA enhances and reimagines traditional resident service models, such as HCV and 5(h) Homeownership programs, and broadens the reach of partner programs dedicated to serving PHA residents. RPP leverages other valuable assets, including experienced staff and dedicated community space, to engage partners in developing and implementing programs.

Programs provided directly through RPP and through its partners are targeted to address a diversity of need, from the most vital need for safety and well-being to long-term aspirations of homeownership and entrepreneurship.

- **Workforce Development.** The Vaux Community Building is home to RPP's Workforce Center, Section 3 Resource Center and Job Bank, providing a range of support to residents on their path to self-sufficiency. Workforce Navigators at Vaux assess residents' needs and goals and support residents in developing a plan to reach them, tapping into a wealth of programs and resources for each step of their plan to reaching their goals. Workforce Navigators assist and connect a diverse population of residents to programs that meet them where they are, from young adult workforce development programs like PowerCORPS and College Unbound to skilled trade training programs such as the Raymond Rosen Trade Entry-level Experience program

This broad support is made possible by RPP's long-standing partnerships with institutions such as Temple University and the Lenfest Foundation, partners committed to developing job training and education programs tailored to preparing PHA residents for well-paid, secure jobs. Workforce program partnerships are characterized by a mutual commitment

to serving residents, as RPP works collaboratively with partners to obtain grant funding and provide space at Vaux for partners to host programs. In FY 2022, PHA received grant funding to sponsor the CVS Pharmacy Technician Training program, CCI Appliance Repair Training program, and Trades for Difference Construction Pre-Apprenticeship program. In all, 124 residents were enrolled in job training and education programs offered by these and other partners in FY 2022.

Though the COVID-19 pandemic delayed the start of many programs, RPP kept residents engaged in workforce development, working with residents to develop soft skills, such as job search and resume writing, while they awaited the start of the program.

- **Diversionsary Initiative.** In partnership with the Philadelphia Housing Authority Police Department (PHAPD), RPP's Diversionsary Initiative team helps to meet the most basic needs of PHA families in the wake of violence and trauma. Families receive trauma-informed care, including grief counseling, and are connected with other critical victim services. Through the Diversionsary Initiative, RPP and PHAPD worked together in FY 2022 to engage with residents in developing strategies to reduce crime and conducting workshops on topics such as domestic violence.
- **Learning and Enrichment.** RPP offered after-school programs at seven (7) family sites to provide an opportunity for continued learning and to support working families. After-school programs ran Monday to Friday and provided over 100 PHA children with homework assistance, service-learning projects, and recreation for three hours daily. Mighty Writers also provides out-of-school time programming on-site at PHA, which were focused on critical and creative thinking.
- **Homeownership.** To ensure that families participating in the RPP's Opening Doors to Affordable Homeownership Program (ODAH) realize their dreams of homeownership, RPP staff connected 38 families with PhillySEEDS mortgage closing cost assistance. In all, 94 PHA families became first-time homeowners in FY 2022 through ODAPH. RPP has expanded homeownership programs available to PHA families to include a variety of assistance, including support in obtaining Section 203(k) insured loans to purchase and rehabilitate scattered site units to a new PH Mobility program to provide assistance to PH families who do not qualify for the traditional 5(h) homeownership program.
- **Entrepreneurship.** In FY 2022, RPP developed and began implementation of its Entrepreneurship Fellowship through the Section 3 program for residents with aspirations of starting their own business. The six-month program provides participants credit counseling through Clarifi, support for developing business plans and obtaining grant funds. In FY 2022, the first cohort of 12 residents began the fellowship and are on-track for completion; PHA began the second cohort which includes 16 residents. Graduates of the fellowship will be eligible to receive funding for start-up costs and opportunities to access commercial space.

The COVID-19 pandemic highlighted the need for PHA to respond quickly and flexibly to evolving challenges and barriers faced by PHA families. In FY 2022, MTW funding allowed PHA to provide services for all PHA residents, no matter their age or needs:

- **Support for Virtual Learning.** During school closures, RPP continued to work with the School District of Philadelphia (SDP) to operate six (6) remote learning centers for PHA school-aged children to engage in virtual learning. RPP and SDP also installed wireless hotspots and distributed laptops to ensure that PHA families with school-aged children could continue their schooling during school closures. To prepare families for the return to in-person learning, PHA and SDP distributed book bags filled with school supplies to over 500 school-aged children.
- **Vaccination.** In FY 2022, PHA continued vaccination drives and expanded its COVID-19 response through the PHA Cares initiative, a partnership with Temple University and the Temple Lenfest Center for Community Partnerships. Through PHA Cares, PHA residents were hired and trained as Community Health Workers who served 14 PHA sites. In FY 2022, Community Health Workers provided support and coordination for 23 vaccine clinics at 10 PHA sites, which administered over 400 vaccines. As the pandemic abated, Community Health Workers provided workshops and information sessions on behavioral health and breast cancer awareness, among other topics, and plans to expand their health education efforts in FY 2023.
- **Shift in Service Delivery.** RPP worked closely with partners to modify the format of programs and services to ensure residents could continue to access them when pandemic health and safety restrictions were in place. Recognizing they needed to reach families during the critical window before children enter school, RPP worked with ParentChild+ to transition their programming model to a virtual format so that they could continue to serve new parents and their young children.

A central feature of its successful programs, accessibility is at the center of each program’s design, including both RPP and partner programs. MTW funds were utilized to support the development of the Vaux Community Center, which houses the PHA Workforce Center, Section 3 Resource Center and Job Bank, and the Youth and Family Center, which PHA anticipates opening in FY 2023 at PHA’s headquarters.

- **Vaux Community Center.** PHA received grant funding for the CVS Pharmacy Technician program, which is offered at the Vaux Community Building. As of the end of FY 2022, seven (7) graduates completed the program and are now employed full-time as a pharmacy technician.
- **Youth and Family Center.** PHA completed planning for a new Youth and Family Center at PHA’s headquarters, which will house RPP and partner programming for PHA children and their families. Like Vaux, PHA plans to commit its own resources to encourage partners to deliver services on-site and ensure accessibility for PHA families.

B. Local Asset Management Plan

Local Asset Management Plan

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

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

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

iv. *If the MTW PHA has provided a LAMP in the appendix, provide a brief update on implementation of the LAMP. Please provide any actual changes, or state that the MTW PHA did not make any changes in the Plan Year.*

No
Yes
Yes
No changes made in the Plan Year.

VI. ADMINISTRATIVE

A. Reviews, Audits, and Inspections

Table 22 below includes general descriptions and statuses of HUD reviews, audits and/or physical inspection issues for which PHA was required to take action to address deficiencies and/or recommendations in FY 2022.

Table 22: Status of HUD Reviews, Audits & Inspections

Review	Summary Description	Status
HUD Follow Up Maintenance Monitoring Review	HUD Maintenance Monitoring Review report was submitted to PHA in April 2016. PHA submitted responses and corresponded with HUD in 2016. HUD closed out three of eight required actions in December 2016. The HUD Field Office has indicated that PHA’s response to the remaining five required actions are acceptable. Before formally closing out the review, HUD will review PHA’s implementation of these actions during the next Maintenance Review.	Open
HUD OIG Audit of HUD Oversight of Lead Based Paint in Public Housing and HCV	HUD OIG is conducting an audit of HUD’s oversight of lead-based paint in public housing and HCV housing. In 2017, PHA provided survey and case information requested by the OIG in various submissions. PHA received follow up correspondence from HUD in June 2019 and submitted a response in July 2019.	Open
HUD OIG Audit of Authority's oversight of lead based paint in the Public Housing Program.	HUD OIG selected PHA for an audit of the Authority’s management of lead-based paint and lead-based paint hazards in its public housing program. An entrance conference was held on November 17, 2021, and the audit has commenced. PHA is responding on a timely basis to OIG requests.	Open
HUD Office of Public and Indian Housing, Quality Assurance Division (QAD)	HUD QAD selected PHA for participation in a review of Memorandum of Understanding (MOU), Referral, and Eligibility in the Emergency Housing Voucher (EHV) program. The review was opened March 14, 2021. HUD cancelled this review as of April 11, 2022, noting that they "... are cancelling this review until [HUD] can identify an alternative means of obtaining the information we need."	Cancelled

PHA has instituted a policy whereby 100% of all deficiencies noted during REAC inspections, routine or otherwise, are tracked by way of creating a service order in the Customer Relationship Management system. Once created, these service orders can then be accessed and updated until work is complete. Addressing actual maintenance, the entire agency has placed a stronger emphasis on the creation of service orders to immediately address deficiencies, both inside and outside of units, found during annual or informal inspections and site visits. PHA believes that these measures will continue to have a positive impact on future REAC scores.

B. Evaluations

Not applicable. PHA utilizes internal resources to measure and evaluate MTW Activities.

C. Certification of MTW Statutory Requirements

PHA certifies that, in Fiscal Year 2022, it continued to meet the three statutory objectives of the MTW program. The Board resolution containing the certification required by HUD is included as an Appendix.

VII. APPENDICES

A. Limited English Proficiency Policy Information

PHA's Board-approved Limited English Proficiency Policy (LEP) commits the agency to taking "...all reasonable steps to ensure that PHA's programs, services, and activities are accessible to persons with Limited English Proficiency. This is consistent with PHA's goal to provide equal housing opportunities for all qualified applicants and residents and its commitment to prohibiting discrimination on the basis of national origin, in PHA's selection of families and provision of services.

PHA has designated an LEP Coordinator, and has posted its LEP Policy on the PHA website at this link: http://www.pha.phila.gov/media/164231/lep_policy_4_1_13.pdf

PHA's website incorporates the Google Translate feature that allows users to translate any web page into an extensive menu of available languages. Further, as part of its commitment to promoting open access to PHA programs and services, PHA provides translations of other documents, telephone translations and in-person translation services upon request. Where possible and appropriate, bilingual PHA staff provide telephone and in-person translation services directly in accordance with the LEP Policy.

Below is information on third-party telephone and in-person translation services utilized in FY 2022. Please note that oral translation services provided by PHA bilingual staff are not included in the numbers below.

Telephone Translation Services Provided in FY 2022

Language	Number of Calls	Minutes
Spanish	9	85
Total	9	85

In Person Translation Services Provided in FY 2022

Language	Requested	Serviced	Canceled
American Sign Language	3	0	3
Total	3	0	3

Forms and Notices

PHA documents are translated on an ongoing basis in response to the needs and/or specific requests of applicants, HCV participants, public housing residents, vendors and the general public. PHA maintains a library of documents that have been translated into Spanish, the primary language spoken by non-English speakers that are served by PHA programs. PHA has also translated the public housing lease, lease addenda and related notices along with various other materials into

Russian and Mandarin. Periodically, HUD also makes available translated versions of standard HUD forms and other documents used in the Public Housing and HCV programs.

B. Local Asset Management Plan

No changes were made during the Plan Year to the Local Asset Management Plan. See attached

LOCAL ASSET MANAGEMENT PLAN

Introduction

Pursuant to the First Amendment to the Moving to Work Agreement, in Fiscal Year 2010 (MTW Year Nine) the Philadelphia Housing Authority has implemented a local asset management plan for its Public Housing Program as described herein. In the implementation of the plan, PHA will continue to adopt cost accounting and financial reporting methods that comply with HUD and federal regulations and generally accepted accounting practices.

PHA's plan supports and is consistent with the agency's ongoing implementation of project-based management, budgeting, accounting and financial management. PHA's project-based management system emphasizes the provision of property management services that have met agency-wide standards while responding to the unique needs of each property. Day to day operations of PHA sites are coordinated and overseen by Property Managers assigned to each property. PHA Property Managers oversee the following management and maintenance tasks:

- Marketing and tenant selection
- Rent collections
- Routine and preventive maintenance
- Unit turnover
- Security
- Resident services
- Resident and community relations
- Capital improvements planning
- Other activities necessary to support the efficient operations of the site

In the implementation of these project level management activities, other PHA departments including Public Safety, Maintenance, Development, ISM, Finance and Budget, Human Resources, Community Operations & Resident Development, Office of General Counsel, Supply Chain Management, and the Office of Audit and Compliance support PHA Property Managers. Property Managers have access to on-line detailed and summary management reports on budget status, waitlist management, key performance indicators to facilitate their monitoring and oversight of property level activities. PHA also conducts Performance Management meetings on a monthly basis, to allow for a thorough review of key performance indicators at the individual site and system-wide levels.

PHA Property Managers develop and monitor property budgets, with support from the PHA Finance and Budget staff. Budget trainings are held annually to support the budget development process. Property Managers are provided with tools to develop their budget estimates including property-specific non-utility and utility cost data from the prior 18 months.

PHA's local asset management plan is consistent with the principles of asset management described in 24 CFR 990.255 and in the First Amendment to PHA's MTW Agreement. Further, the plan is generally consistent with the provisions of 24 CFR 990.260, 990.265, 990.270, 990.275 and 990.285. As allowed under the First Amendment to the MTW Agreement, PHA's local asset

management plan deviates from parts of 24 CFR 990.280, including requirements related to property management fees and fees for services. PHA will utilize the Cost Allocation method referenced in paragraph 6.F.4.b of the First Amendment.

Due to the unique features of the Philadelphia market, PHA's housing portfolio, and the agency, PHA has determined that use of the Cost Allocation method is the most efficient, cost-effective means of achieving the asset management principles referenced above. The factors that impact PHA's asset management plans include, but are not necessarily limited to, the following:

- Scattered Site Portfolio. PHA has over 4190 scattered site properties, which represents nearly 1/3 of its public housing portfolio. We understand this is far and away the largest scattered site public housing portfolio in the country. The geographic diversity of these scattered site units impacts warehouse operations, locations and numbers of management offices, and staffing requirements.
- Aging Housing Stock. PHA operates one of the oldest public housing stocks in the country. It is costlier to operate than newer housing. PHA has engaged in an aggressive development program during the last few years to upgrade and redevelop its units. Due to a lack of adequate funds, this process is far from complete.
- Unionized Workforce. PHA has a heavily unionized workforce. Currently, PHA has contracts with approximately 11 unions. This significantly impacts the operations and costs of PHA's activities. As such, PHA's asset management plan is structured to be cost effective within the limits of these contracts.
- MTW Initiatives. Since the onset of its participation in MTW, PHA has sought to use its MTW flexibilities to implement agency-wide cost-cutting initiatives that will increase efficiencies, maximize use of federal dollars, and benefit PHA's clients. PHA has moved many functions to the site-based level, however a number of MTW initiatives require central administration so they can be adequately measured. For example, PHA has implemented innovative technological systems to maximize efficiencies in admissions, property management, and client services. There are costs associated with development and implementation of these systems before they are implemented at the site level. Under MTW, PHA has also implemented departmental oversight protocols through its Quality Assurance Program. PHA's quality control program has already made PHA's programs more efficient by reducing errors and improving oversight.
- Local Costs. Philadelphia is an old, industrial city where labor costs for maintenance and construction activities are significant. These high costs can be attributed to, in part, prevailing wage requirements as well as the cost of materials and services in the Philadelphia market.

A description of the cost allocation plan and other technical components of PHA's local asset management plan follows:

I. AMP Definitions

An AMP will include any site that receives Operating Subsidies through HUD's Operating Fund Calculation. PHA currently has two types of PHA managed AMPs and PAPMC/AME managed AMPs.

II. Balance Sheet Items (Assets, Liabilities & Equity)

PHA has distributed balance sheet accounts by AMPs as planned in the original Local Asset Management balance sheet accounts were analyzed and distributed between the AMPs and the Indirect Cost Departments.

A. Cash & Investments

PHA maintains consolidated physical bank accounts, but for financial statement presentation cash is distributed between all PHA AMPs and the Indirect Cost Departments. Direct cash and expenses are charged to the proper AMPs or Indirect Cost Departments general ledger account. At the end of the year, cash is adjusted to offset indirect cost allocations between the AMPs and the Indirect Cost Departments. The offsetting of the indirect cost allocations effectively adjusts the inter fund balances to zero except where the AMPs have a negative cash balance which is presented as an inter-fund to the Indirect Cost Departments. All remaining cash and investment balances are presented with the Indirect Cost Departments and reported in the MTW Column of the FDS.

Investment income will be allocated between the PHA Managed AMPs based on the number of units eligible for subsidy from the most recent HUD approved Operating Fund Calculation.

B. Tenant Accounts Receivable and Allowance for Doubtful Accounts

Tenant accounts receivable balances and allowance for doubtful accounts are reported on an AMP basis for each of the PHA Managed AMPs. The ending balances are reconciled to the tenant supporting detail ledgers,

PAPMC/AME Managed AMPs tenant balances are not reported as AMPs in the FDS. Based on PHA's analysis of GASB pronouncements, these AMPs are presented as either a discrete component unit or blended component unit. Tenant accounts receivable and allowance for doubtful accounts are included in the PHA Audited financial statements as a discretely presented component unit.

C. Other Accounts Receivable

Other accounts receivable will be distributed based on the purpose and source of the receivable. Receivables related to a PHA Managed AMP and PAPMC / AME Managed AMP will be distributed to the specific AMP. Any receivable that is not associated to a specific AMP will be distributed to the Indirect Cost Departments.

D. PHASI / Worker's Compensation Cash and Liabilities

The PHASI and Worker's Compensation cash and liabilities will remain with the Indirect Cost Departments and reported in the MTW column of the FDS. At this time, PHA has determined that these liabilities are PHA Agency Wide liabilities and not liabilities of the PHA Managed AMPs or the Indirect Cost Departments. The expenses related to the PHASI liability and worker's compensation liability are charged to appropriate programs or AMPs. PHA has created a cash reserve for the PHASI liability. The cash reserve offsets PHA's liabilities so that the liability is fully funded. PHA utilizes the reserves to pay the liability as needed. PHA has a cash reserve that is held by the Worker's Compensation insurer.

E. Prepaid Insurance

The prepaid insurance balances for the PHA Managed AMPs will be distributed to AMPs based on the number of units eligible for subsidy from the most recent HUD approved Operating Fund Calculation.

PAPMC/AME Managed AMPs will not be included in the AMPs Columns of the FDS. Prepaid insurance is included in the PHA Audited financial statements as either a blended or discretely presented component unit.

F. Materials Inventory and Allowance for Obsolete Inventory

PHA currently maintains all maintenance materials inventory centrally. AMPs and departments submit requests for inventory and materials are issued then expenses are charged to the appropriate AMP or program. Ending centralized materials inventory and allowance balances for the PHA Managed AMPs will be distributed to AMPs based on the number of units eligible for subsidy from the most recent HUD approved Operating Fund Calculation.

PAPMC/AME Managed AMPs will not be included in the AMPs Columns of the FDS. Materials inventory is included in the PHA Audited financial statements as either a blended or discretely presented component unit.

G. Fixed Assets and Accumulated Depreciation

Fixed assets and accumulated depreciation will be reconciled to the PeopleSoft Asset Module and distributed to the appropriate PHA Managed AMPs and the Indirect Cost Departments. PHA's Asset Management (AM) Module has been established for many years. AM provides PHA with the ability to prepare fixed asset and depreciation reports by AMP or department. AM tracks all fixed assets transactions and records all monthly fixed asset entries. Fixed assets and accumulated depreciation are reported with the appropriate AMP or the MTW Column for assets held by the Indirect Cost Departments.

PAPMC/AME Managed AMPs will not be included in the AMPs Columns of the FDS. Fixed assets and accumulated depreciation are included in the PHA Audited financial statements as either a blended or discretely presented component unit.

H. Accounts Payable and Accrued Liabilities

Other accounts payable and accrued liabilities include all liabilities not specifically referred to in the following detailed liability categories. Other accounts payable and accrued liabilities will be distributed based on the purpose and source of the payable or liability. Payables or liabilities related to a PHA Managed AMP and PAPMC / AME Managed AMP will be distributed to the specific AMP. Any payable or liability that is not associated to a specific AMP will be distributed to the Indirect Cost Departments.

I. Payroll Liabilities

All payroll tax and benefits liabilities will continue to be presented with the Indirect Cost Departments and reported in the MTW Column of the FDS. At this time, PHA has determined that these liabilities are PHA Agency Wide liabilities and not liabilities of the PHA Managed AMPs or the Indirect Cost Departments. However, PHA has utilized the LIPH (Fund 001) cash accounts in the past to pay most Agency Wide liabilities, then the LIPH (Fund 001) will receive reimbursements from other programs where applicable. The expenses related to the payroll liabilities will continue to be charged to appropriate programs or AMPs.

Accrued salaries and wages liability will be distributed to/ between AMPs based on the number of units eligible for subsidy from the most recent HUD approved Operating Fund Calculation.

J. Compensated Absences

Compensated absences liabilities will be distributed to/between the PHA Managed AMPs based on the number of units eligible for subsidy from the most recent HUD approved Operating Fund Calculation.

No compensated absences liabilities will be distributed to the PAPMC / AME AMPs because the PAPMC/AME AMPs are charged salaries and benefits for the direct use of PHA staff.

K. Net Position

Invested in Capital Assets balances will follow the Net Fixed Assets that are owned by an AMPs or Departments. Invested in capital assets will be distributed between the Indirect Cost Departments and the PHA Managed AMPs based on where the Net Fixed Assets is distributed.

The Public Housing Program Unrestricted Net Position for all AMPs will be the net of the accumulated direct and indirect operating revenues and expenses for each AMP.

PAPMC/AME Managed AMPs will not be included in the AMPs Column of the FDS. Invested in capital assets are included in the PHA Audited financial statements as a blended or discretely presented component unit. Unrestricted net position for the PAPMC / AME Managed AMPs from their operating activities will be presented in PHA's Audited financial statements as a blended or discretely presented component unit. Each of these AMPs will have an unrestricted net position in the AMPs Column of the FDS which is the net accumulated excess or deficiency of operating subsidy revenue and operating subsidy paid to the AMPs and the net of the allocation of PHA's indirect expenses.

III. Revenues

A. Tenant Revenues

1. PHA Managed AMPs

Tenant Revenues will be directly charged to the appropriate AMP.

2. PAPMC/AME Managed AMPs

PAPMC/AME Managed AMPs will not be included in the AMPs Column of the FDS. Tenant revenue is included in the PHA Audited financial statements as either a blended or discretely presented component unit.

B. Direct Revenues

Direct revenues include tenant fees and service charges that can be identified and charged to a specific site.

1. PHA Managed AMPs

PHA currently records all direct revenues to the proper PHA Managed AMP. PHA currently records all tenant charges and any direct revenue to the proper PHA Managed AMP. PHA's account structure includes the program code (AMP number) and the appropriate department code, which enables PHA to charge the revenues to the proper PHA Managed AMPs.

PHA's systems and procedures related to direct revenues currently in application are in compliance with asset-based accounting. PHA's systems and procedures will require no transition period or transition procedures to comply with asset-based accounting requirements of presenting all direct revenues under the proper AMP.

2. PAPMC/AME Managed AMPs

PAPMC/AME Managed AMPs will not be included in the AMPs Column of the FDS. Direct revenues are included in the PHA Audited financial statements as either a blended or discretely presented component unit.

C. Indirect Revenues

Indirect revenues are other income items that cannot be identified or charged to a specific AMP or to the Indirect Cost Departments. Indirect revenues will be allocated between the PHA Managed AMPs based on the number of units eligible for subsidy from the most recent HUD approved Operating Fund Calculation.

D. HUD Operating Subsidy

For PHA's project-based accounting purposes, Operating Subsidy is considered an indirect revenue source. PHA's Operating Subsidy is provided in one block as if PHA were one AMP. The funding for all AMPs is calculated using the same Allowable Expense Level per PHA's MTW agreement. Since the basis of the funding calculation is the same across all AMPs, PHA considers Operating Subsidy an indirect revenue source.

Operating Subsidy will be allocated to all PHA AMPs based on the number of units eligible for operating subsidy from the most recent HUD approved Operating Fund Calculation.

E. Operating Transfers from the MTW Block (Excess HAP) & CFP

1. PHA Managed AMPs

PHA has included in its MTW annual plan Operating Transfers from the MTW Program and the CFP Program into the Public Housing Program to offset operating expenses. PHA has determined that the appropriate treatment of Operating Transfers at the current time based on the number of units eligible for subsidy from the most recent HUD approved Operating Fund Calculation. PHA will establish separate account numbers for the MTW and CFP Operating Transfers. The Operating Transfers are made to assist the PHA Managed AMPs with its operations. PHA may need to adjust the allocation of the Operating Transfers in fiscal years to assist the operating needs of one AMP over another AMP that may not need the assistance. PHA's MTW agreement with HUD permits the PHA flexibility to move funds between its Public Housing, Section 8 HCV, and CFP programs. PHA will reserve the right to adjust the allocations of the Operating Transfers to meet the financial needs of all the PHA Managed AMPs.

2. PAPMC / AME Managed AMPs

Operating Transfers will not be allocated to the PAPMC / AME Managed AMPs.

IV. Expenses

A. Direct Expenses

1. PHA Managed AMPs

PHA currently records all direct expenses to the proper AMP. PHA's procurement and accounts payables processes include assigning the proper chart fields or account structure. PHA's account structure includes the program code (AMP number) and the appropriate department code.

For payroll, PHA directly charges all payroll costs using account labels. Account labels are used to tell PHA's accounting system where to directly charge an employee's payroll costs. PHA can setup as many account labels as needed to have payroll costs charged to the proper program, department, AMP, etc. based on PHA's requirements. PHA's accounting system gives the Authority the automated ability to charge payroll costs from the employee timesheets to the proper account. When employees complete their weekly timesheets, the employees report all hours to account labels. The timesheets allow employees to charge as many account labels as needed during the week. Employees submit their timesheets to their direct supervisor for approval. The direct supervisor verifies that the correct account labels were used.

PHA's systems and procedures related to direct expenses currently in application are in compliance with asset-based accounting. PHA's systems and procedures will require no transition period or transition procedures to comply with asset-based accounting requirements of presenting all direct revenues and expenses under the proper AMP.

2. PAPMC/AME Managed AMPs

The only PAPMC/AME Managed AMPs direct expenses that will be included in AMPs FDS column are PHA's payment of Operating Subsidies and any other direct expense paid by PHA. All other direct expenses are included in the PHA Audited financial statements as either a blended or discretely presented component unit.

B. Corporate Legal

PHA has diverse legal issues due to the size of its programs. PHA will analyze legal expenses to determine the appropriate treatment of the legal expenditures. The treatments of the legal expenses are as follows:

1. Direct Legal Expenses

Legal expenses that can be identified as a direct cost to a specific AMP will be charged to that AMP.

2. Indirect Legal Expenses

Indirect legal expenses that cannot be defined as costs for a specific AMP but can be identified as providing benefits to the PHA Managed AMPs based on the number of units eligible for subsidy from the most recent HUD approved Operating Fund Calculation.

C. Payroll Expenses

PHA currently directly charges all maintenance payroll costs to the direct PHA Managed AMP. PHA directly charges all payroll costs using account labels. Account labels are used to tell PHA's accounting system where to directly charge a maintenance employee's payroll costs. PHA can setup as many account labels as needed to have payroll costs charged to the proper PHA Managed AMP. PHA's accounting system gives the Authority the automated ability to charge maintenance payroll costs from the employee timesheets to the proper account. When maintenance employees complete their weekly timesheets, the employees report all hours to account labels. The timesheets allow maintenance employees to charge as many account labels as needed during the week. Maintenance employees submit their timesheets to their direct supervisor for approval. The direct supervisor verifies that the correct account labels were used.

D. Materials and Contract Costs

PHA currently records all maintenance materials and contract costs directly to the proper PHA Managed AMP. PHA's procurement and accounts payables processes include assigning the proper chart fields or account structure. PHA's account structure includes the program code (AMP number) and the appropriate department code.

PHA's systems and procedures related to maintenance materials and contract costs currently in application are in compliance with asset-based accounting. PHA's systems and procedures will require no transition period or transition procedures to comply with asset-based accounting requirements of presenting all direct revenues and expenses under the proper AMP.

E. Indirect Expenses

PHA will be using an allocation to charge overhead from the Indirect Cost Departments (MTW Column) to all AMPs. Overhead costs will be allocated to the AMPs based the number of units eligible for subsidy from the most recent HUD approved Operating Fund Calculation.

V. Capital Fund Program

All expenditures under the Capital Fund program are charged to the appropriate AMP or Indirect Cost Department. Revenues are applied to the appropriate AMP or Indirect Cost

Department based on the actual expenditures. The expenditures related to the Indirect Cost Departments or MTW initiatives are reported in the MTW Column of the FDS.

Although PHA is an MTW agency and is not required to, PHA reports and tracks all CFP expenditures based on the CFP Budget Line Items. PHA has determined this method to be accurate and efficient method to track CFP expenditures.

VI. Project Based Budgeting

PHA currently prepares project based operating budgets for all the Amps and departments. PHA adds all the budgets to the Automated Accounting System. The operating budgets are currently used in the procurement, accounts payable process and the preparation of monthly financial statements. PHA's operating budget process is currently in compliance with the HUD Project Based Budgeting requirements.

When PHA has prepared its Capital Fund Program Budgets, PHA determines specific capital work items that need to be completed at all or some of PHA sites. PHA does not establish a Capital Budget by site, but by work item. Then once PHA determines which sites PHA will perform the work item, PHA reclassifies the budget amount from a PHA Wide work item to the specific site. PHA will continue this process; however, the budget will be established at the Capital Projects category rather than PHA Wide

C. Board Certification of Compliance with MTW Statutory Objectives

RESOLUTION NO. 12217

RESOLUTION APPROVING THE PHILADELPHIA HOUSING AUTHORITY'S ANNUAL MOVING TO WORK REPORT FOR FISCAL YEAR 2022 FOR SUBMISSION TO THE U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT AND CERTIFYING THAT THE THREE STATUTORY REQUIREMENTS HAVE BEEN MET

WHEREAS, the U.S. Department of Housing and Urban Development ("HUD") requires the Philadelphia Housing Authority ("PHA"), as a participant in the Moving to Work Demonstration Program ("MTW"), to submit an Annual Report on the status of its programs, operations, and finances in a form specified and required by HUD; and

WHEREAS, under the MTW Agreement, HUD will assess PHA's performance on an annual basis by comparing, at the end of PHA's fiscal year, its goals as stated in its approved MTW Annual Plan, to its actual performance, as stated in its Annual Report; and

WHEREAS, PHA must include in the MTW Annual Report all required elements as described in the MTW Agreement; and

WHEREAS, Attachment B of the MTW Agreement, HUD Form 50900 Section VI (C), requires a certification in the Annual Report that PHA has met the three MTW statutory requirements of: 1) ensuring that at least 75 percent of the households assisted by PHA are very low-income; 2) continuing to assist substantially the same total number of households as would have been assisted had PHA not participated in the MTW Demonstration Program; and 3) maintaining a comparable mix of households (by family size) served as would have been had PHA not participated in the MTW Demonstration Program; and

WHEREAS, the Annual Report must be submitted ninety (90) days after the end of PHA's fiscal year; and

WHEREAS, PHA's fiscal year ended on March 31, 2022 and its Annual Report is due to HUD on or before June 30, 2022; and

WHEREAS, PHA has prepared its Annual MTW Report for Fiscal Year 2022, which is ready for timely submission to HUD and which contains all the required elements;

BE IT RESOLVED, that the PHA Board of Commissioners hereby approves PHA's Annual Report for the MTW Demonstration Program for Fiscal Year 2022 (period ending March 31, 2022), as distributed to the Board, for submission to HUD, and certifies that the report reflects that PHA has met the three MTW statutory requirements of: 1) ensuring that at least seventy-five (75) percent of the households assisted by PHA are very low-income families; 2) continuing to assist substantially the same total number of households as would have been assisted had PHA not participated in the MTW Demonstration Program; and 3) maintaining a comparable mix of households (by family size) served as would have been served had PHA not participated in the MTW Demonstration Program; and, authorizes the President & CEO and/or his designee(s) to undertake all necessary actions including, but not limited to, responding to HUD comments and requests for additional information, in order to secure HUD approval for the MTW Annual Report.



I hereby certify that this was
APPROVED BY THE BOARD ON 20/10/2022
Laura M. Redc
ATTORNEY FOR PHA