

PHILADELPHIA HOUSING AUTHORITY



MOVING TO WORK ANNUAL REPORT

**PHA FISCAL YEAR 2023
APRIL 1, 2022 - MARCH 31, 2023**

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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 2023, i.e., the period from April 1, 2022 to March 31, 2023. 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.

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 and further updated in FY 2023. 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.

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 described in the FY 2015 MTW Annual Plan.

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.

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 1,203 units of mixed-income housing, including affordable rental and homeownership units.

A total of 457 housing units have been completed and an additional 745 are under construction or near closing in development phases undertaken by PHA or through development partnerships overseen by PHA. The redevelopment project has catalyzed the broader revitalization of the Sharswood neighborhood, including the development of the new \$52 million mixed-use (retail and housing) Sharswood Ridge complex, adjacent to PHA's headquarters. Sharswood Ridge's first major tenant, a fresh foods grocery outlet, opened its doors in FY 2023, the first supermarket to open in the neighborhood in over 50 years.

In addition to this housing and retail development, a new Youth and Family Center opened its doors within PHA's headquarters in October 2022. The Vaux Community Building has been substantially rehabilitated and is now home to 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.

North Central/Norris

In FY 2023, the Choice Neighborhood Transformation Plan for North Central/Norris was successfully completed in collaboration with the City, resulting in extensive community improvements and construction of 272 rental, 30 homeownership units, and a community center. PHA is developing plans to build additional housing units on the former public housing site. PHA will continue to collaborate with the City on the final CNI grant close-out and serve as People Lead Partner, including overseeing endowment-funded service activities for Norris residents.

West Park Apartments

PHA is undertaking the complete redevelopment of West Park Apartments, an 11-acre, 327-unit Public Housing development. In FY 2023, PHA continued to plan for the redevelopment financing and design, finalized the overall \$450 million plan to develop 1,000 mixed-income units, selected development partners, and relocated current residents. The plan, which was developed in

consultation with the community and approved by the PHA Board in January 2023, will include the substantial rehab of three (3) existing high-rise towers; new construction of a midrise building for seniors; and, development of low-rise apartment buildings and new family townhomes throughout the site and on an adjacent lot. The redeveloped West Park Apartments will include units targeted for households earning up to 60% of Area Median Income, including Public Housing replacement units, as well as market-rate units. Ground floor commercial spaces will be incorporated into the development plan along with extensive site reconfiguration, infrastructure improvements and a new gateway to Market Street. Subject to financing plan and other approvals, PHA projects that the first phase of construction will begin in late FY 2024.

Bartram Village/Kingsessing

PHA was awarded the Choice Neighborhoods Planning grant for Bartram Village and the surrounding Kingsessing neighborhood to support the development of a comprehensive transformation plan. In April 2020, HUD accepted the resultant Transformation Plan which envisions the development of 608 mixed income units, including 500 Public Housing replacement units and a series of innovative neighborhood improvements and supportive services activities. In FY 2023, PHA's planned redevelopment of the Bartram Village public housing development achieved a major milestone with PHFA's October 2022 award of 9% Low Income Housing Tax Credits for the first off-site construction phase. PHA anticipates that closing on the first phase will occur in FY 2024. Also in FY 2023, in partnership with the City, PHA submitted a \$50 million application to HUD for competitive Choice Neighborhoods Implementation grant funding, which is currently under HUD review.

Fairhill Apartments

PHA continued to plan for the complete redevelopment of the Fairhill Apartments public housing development in multiple on and off-site phases. The redevelopment plan calls for one-for-one replacement of the existing 264 housing units plus 100 additional units; reconfiguration of streets; demolition of low-rise buildings; rehabilitation of two tower buildings as senior housing; development of replacement family units on and off-site; and rehabilitation of a nearby community center. In FY 2023, PHA moved forward with plans to acquire approximately 100 off-site parcels. Subject to financing plan and other approvals, PHA projects that construction of the first phase will commence in FY 2024.

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 2023, PHA has closed on 1,970 rental units at 30 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 \$685 million for RAD projects which have closed, including over \$303 million in private equity.

Harrison Plaza Senior Tower

The conversion of Harrison Senior Tower, which was completed in FY 2023, illustrates how RAD has enabled PHA to preserve aging housing stock by leveraging financial resources to renovate and improve the quality of life for its residents. As part of its overall asset repositioning strategy, PHA transformed the Tower, a 67 year old building in need of costly repairs, into a high-quality senior community which provides residents with unit and community amenities to allow them to age comfortably, including grab bars and other life safety unit features and building amenities such as a community room with an outdoor patio and health screening room.

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 2023, construction was completed on Rafael Porrata Doria Place, a 30-unit development designated for senior and disabled families. PHA is also collaborating with community partners on nine additional (9) new public housing developments, which were still under development as of the end of the fiscal year. Pursuant to PHA's FY 2024 MTW Plan, a majority of these new developments will be converted to project-based assistance prior to occupancy under Faircloth-to-RAD or RAD transfer of assistance.

Citywide Development

Over the course of the fiscal year, PHA provided long-term subsidy to over 4,450 housing units at 160 developments throughout the city 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, Women's Community Revitalization Project, Mission First Housing Group, HELP USA, Methodist Family Services, and others. In FY 2023, PHA entered into Agreements and/or Housing Assistance Payments Contracts for 146 new units at two (2) developments, both 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.

During FY 2023, planning continued for collaborative partnerships with private and nonprofit affordable housing developers to safeguard long-term affordable housing development in targeted areas of Philadelphia by transferring vacant properties for redevelopment. A 20-year restrictive covenant will ensure that the properties will be redeveloped as long-term affordable housing.

Leased Housing

In FY 2023, PHA provided rental subsidies to over 20,000 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 the UBV program are included in this total.

PHA continued to develop and implement initiatives to streamline leasing and inspections, increase owner participation, and improve customer service including providing financial

incentives to owners to encourage leasing of new HCV units and to retain owners currently participating in the HCV program who lease units in opportunity neighborhoods.

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 public housing and HCV homeownership programs, other new development homeownership initiatives and homeownership readiness and counseling supports under a single department. Through these initiatives, a total of 46 public housing and HCV families became new homeowners in FY 2023. To further equitable development efforts and increase affordable homeownership opportunities for PHA families, PHA expanded its partnership with Jumpstart Philly to support local aspiring developers and renovate vacant and distressed scattered site units for affordable homeownership. In FY 2023, developers completed renovations on the first 10 scattered site units, which were sold to qualifying low-income families. PHA began preparations for the second cohort of 20 scattered site units, conveying these units to the partnership for renovation.

Resident Supportive Service Programs

PHA utilized MTW Block Grant and other partner-leveraged funds to support extensive 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 the Youth and Family Center, which opened its doors in FY 2023. PHA also continued to collaborate with a network of partners, who have demonstrated a long-standing commitment to serving PHA's residents. For detailed information on the programs and services offered to PHA residents through RPP and its partners, see Table 21: Resident Services Program Summary for FY 2023.

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. The program grew in FY 2023, with 13 participants receiving housing, counseling, education, job training and placement services. Through this partnership, Second Chance helps to prevent homelessness and, hopefully, interrupt the cycle of recidivism.

Blueprint to End Homelessness Initiative

PHA continued to provide housing opportunities for homeless individuals and other hard to serve special populations, building on and enhancing the ongoing collaboration between the City and PHA to reduce homelessness through the "Blueprint to End Homelessness" initiative. See also Emergency Housing Voucher discussion.

Sponsor Based Shared Housing Pilot

In FY 2023, PHA provided housing opportunities to 73 individuals in 41 units through partnerships with the City, which serves homeless and other hard to serve populations, and the Community College of Philadelphia (CCP), which serves low-income, at-risk CCP students.

Voucher Holder 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. Through the HOP program, PHA also works with new and potential owners whose units are located in opportunity neighborhoods. As a result, 11 families successfully leased up in high-opportunity neighborhoods through support from the HOP program in FY 2023. PHA also continued to provide owner incentives intended 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 2023. Non-MTW initiatives are those activities that do not generally require the use of MTW regulatory or financial flexibility:

Small Area Fair Market Rents

PHA utilizes Small Area Fair Market Rents (SAFMRs) to establish payment standards for the HCV tenant-based program, which 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. As noted in the discussion of *Voucher Holder Mobility*, PHA has also provided resources to voucher-holders and financial incentives to owners to overcome barriers and encourage leasing in higher opportunity areas.

Veterans Administration Supportive Housing

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. Receipt of an additional allocation of VASH vouchers allowed PHA to serve 688 veterans in FY 2023.

Mainstream Vouchers

In FY 2023, PHA provided housing assistance to 394 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 worked in collaboration with the Philadelphia Department of Human Services to administer Foster Youth to Independence vouchers which HUD initially allocated to PHA in FY 2022. As of the end of FY 2023, PHA was providing housing assistance to 59 individuals under the age of 25 who were homeless or at-risk of homelessness and who have a history of involvement in the child welfare system.

Emergency Housing Vouchers

PHA continued to provide housing assistance to families experiencing or at-risk of homelessness, including those fleeing domestic violence, through the Emergency Housing Voucher (EHV) program. PHA partners with the Philadelphia Office of Homeless Services for the Philadelphia Continuum of Care (CoC), which has committed to providing applicant referrals, housing search and other services to EHV voucher holders. As of the end of FY 2023, PHA was serving 562 families through the EHV program.

Jobs Plus at Wilson Park

PHA completed its first year of implementing the Jobs Plus program at Wilson Park in FY 2023. To date, PHA has assisted 190 residents, providing post-assessment services to 151 of these residents and enrolling 143 in the Jobs Plus Earned Income Disregard rent incentive.

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

The public housing inventory includes affordable rental units for families, seniors, and persons with disabilities, located throughout the City in conventional public housing developments; Low Income Housing Tax Credit (LIHTC) developments managed by the Philadelphia Asset and Property Management Corporation (PAPMC); and developments operated by Alternate Management Entities (AME) under contract to PHA. Approximately 3,800 of PHA’s public housing units are “scattered sites,” i.e. housing units located in single family homes or multi-unit buildings. 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 capital needs backlog continues to grow each year, creating enormous maintenance challenges. In FY 2023, PHA developed a comprehensive asset repositioning strategy with the goal of preserving and expanding the affordable housing portfolio through RAD conversions, Section 18 dispositions, Faircloth-to-RAD development and other initiatives.

Table 1 below provides PHA’s actual public housing inventory as of the end of FY 2023. 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 3/31/2023
MTW Public Housing Units	12,808 (approx.)

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 2023, one (1) new Public Housing development consisting of 30 units completed construction. PHA continued to collaborate with its developer partners on an additional 304 Public Housing units at nine (9) developments. Pursuant to PHA’s FY 2024 MTW Plan, a majority of these developments will be converted to

project-based assistance prior to or following initial occupancy under the Faircloth-to-RAD initiative or RAD transfer of assistance.

Housing Choice Voucher Program

Through the 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, Emergency Housing Voucher and Foster Youth to Independence 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 of 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, 2023, PHA has entered into Agreements and/or Housing Assistance Payments Contracts for 146 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			
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	No	New construction in the Sharswood neighborhood sponsored by Michaels Development.
Harrison Plaza	112	116	Committed	Yes	Conversion of tower in existing public housing

Property Name	# of Vouchers Newly Project-Based		Status at End of Plan Year	RAD?	Description of Project
	Planned	Actual			
					development sponsored by PHA.
Liddonfield	150	0	N/A	No	New construction for seniors in Northeast Philadelphia sponsored by New Courtland. Supportive services are provided.
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.
Queen Row	43	0	N/A	Yes	Conversion of existing public housing development sponsored by PHA.
Sharswood Hunt II	30	30	Committed	Yes	New construction in the Sharswood neighborhood sponsored by Hunt. Supportive Services to be provided.
Sharswood Hunt III	101	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.
	752	146	Total 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 the several properties which PHA planned to project-base in FY 2023 were not yet under AHAP or HAP for various reasons including construction and/or financing delays and other factors. However, these properties are in the final approval stages.

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 4,370 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, 2023, compared to those projected in the FY 2023 MTW Annual Plan.

Table 3: Actual Existing Project Based Vouchers

Property Name	# of Project-Based Vouchers		Status at End of Plan Year	RAD?	Description of Project
	Planned	Actual			
1315 North 8th Street	25	25	Leased/Issued	Yes	New construction 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.
27th & Susquehanna	78	78	Leased/Issued	Yes	New construction in Strawberry Mansion for low-income families sponsored by Susquehanna Net Zero Housing LP.
4050 Apts	20	20	Leased/Issued	No	New construction for income-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.
7th & Ritner	5	5	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	New construction development 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. Supportive services are provided.
Arch VI Temple	40	40	Leased/Issued	No	Existing site for very low-income families in North Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.

Property Name	# of Project-Based Vouchers		Status at End of Plan Year	RAD?	Description of Project
	Planned	Actual			
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.
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	New construction development 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	New construction development 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. Supportive services are provided.
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

Property Name	# of Project-Based Vouchers		Status at End of Plan Year	RAD?	Description of Project
	Planned	Actual			
					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	Substantial rehab 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. Supportive services are provided.
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. Supportive services are provided.
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 and children domestic violence victims in Germantown/Mt Airy sponsored by Community For Dignity & Fairness. Supportive services are provided.

Property Name	# of Project-Based Vouchers		Status at End of Plan Year	RAD?	Description of Project
	Planned	Actual			
Dignity Nedro	4	4	Leased/Issued	No	Existing site for women and children domestic violence victims in Northwest Philadelphia sponsored by Community For Dignity & Fairness. Supportive services are provided.
Dignity-1	10	10	Leased/Issued	No	Existing site for women and children domestic violence victims in Germantown, sponsored by Community For Dignity & Fairness Supportive services are provided.
Dignity-15	4	4	Leased/Issued	No	Existing site for women and children domestic violence victims in Germantown, sponsored by Community For Dignity & Fairness Supportive services are provided.
Dignity-21	11	11	Leased/Issued	No	Existing site for women and children domestic violence victims in Germantown, sponsored by Community For Dignity & Fairness Supportive services are provided.
Dignity-33	16	16	Leased/Issued	No	Existing site for women and children domestic violence victims in Germantown, sponsored by Community For Dignity & Fairness Supportive services are provided.
Dignity-4	3	3	Leased/Issued	No	Existing site for women and children domestic violence victims 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 Germantown sponsored by Penn Housing LLC. Supportive services are provided.
Elders Place II	38	38	Leased/Issued	No	Existing senior site in Germantown sponsored by Penn Housing LLC. Supportive services are provided.
Fattah Homes I	6	6	Leased/Issued	No	New construction development for homeless families with disability in West Philadelphia sponsored by Peoples Emergency Center. Supportive services are provided.
Fattah Homes II	6	6	Leased/Issued	No	New construction development 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.

Property Name	# of Project-Based Vouchers		Status at End of Plan Year	RAD?	Description of Project
	Planned	Actual			
Francis House	10	10	Committed	No	New construction for seniors in Northeast Philadelphia sponsored by St Ignatius. Supportive services are provided.
Francisville East	10	10	Committed	No	Existing project in the Francisville area at 1703-20 Edwin Walk, 1747 Wyle St and 874 Perkiomen St for low-income seniors and families sponsored by Community Ventures.
Francisville Village	10	10	Committed	No	Existing project in the Francisville area at 1504-25 Poplar St for low-income families sponsored by Community Ventures.
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	13	13	Leased/Issued	No	Existing site for homeless low-income individuals in the East Oak Lane section of Philadelphia sponsored by Gaudenzia Foundation Inc. Supportive services are provided.
Gaudenzia Thompson St	6	6	Leased/Issued	No	Existing site for homeless low-income individuals in the North Central section of Philadelphia 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	New construction development for veterans in West Philadelphia sponsored by HELP USA. Supportive services are provided.
Help II	50	50	Leased/Issued	No	New construction development for veterans in West Philadelphia sponsored by HELP USA. Supportive services are provided.
HELP IV	15	15	Leased/Issued	No	New construction development 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.

Property Name	# of Project-Based Vouchers		Status at End of Plan Year	RAD?	Description of Project
	Planned	Actual			
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	New construction for women and their families in North Philadelphia sponsored by Women's Community 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. Supportive services are provided.
Jannie's Place	17	17	Leased/Issued	No	New construction development 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 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 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 sponsored by Mission First Housing Group. Supportive services are provided.

Property Name	# of Project-Based Vouchers		Status at End of Plan Year	RAD?	Description of Project
	Planned	Actual			
Keystone St	6	6	Leased/Issued	No	Existing site for families in Northeast Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
Kings Highway Phase II	31	31	Committed	No	Existing project in the Kensington area at 2004-06 Stella St, 2927-73 Frankford Ave and 3024-26 Frankford Ave for low-income families sponsored by Mission First.
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	Rehabilitation of nursing home in Northeast Philadelphia sponsored by Liberty Resources. Supportive services are provided.
Liberty Resource	2	2	Leased/Issued	No	Rehabilitation of development with a preference for disabled seniors in West Philadelphia sponsored by Liberty Resources. Supportive services are provided.
Liberty Welsh	2	2	Leased/Issued	No	Rehabilitation of nursing home 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	New construction development for very low-income families in West Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
Monument Village	11	11	Leased/Issued	No	Existing site for single women in West Philadelphia sponsored by Methodist Homes. Supportive services are provided.
Morton St	2	2	Leased/Issued	No	Existing site for low-income families in Germantown Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
MPB School Apartments	16	16	Leased/Issued	No	Existing site for very low-income families in North Philadelphia sponsored by Mission First Housing Group.

Property Name	# of Project-Based Vouchers		Status at End of Plan Year	RAD?	Description of Project
	Planned	Actual			
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	New construction development for low-income seniors in North Philadelphia sponsored by New Courtland. Supportive services are provided.
New Courtland at Burholme	35	35	Committed	No	Existing project in the Northeast area at 7023 Rising Sun Ave for low-income seniors sponsored by New Courtland.
New Courtland at Cliveden	32	32	Leased/Issued	No	New construction development 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	45	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.
Norris LP	51	51	Leased/Issued	Yes	Conversion of existing PAPMC public housing development 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	0	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. Supportive services are provided.
Parkside 11	8	8	Leased/Issued	No	Existing site for very low-income families in West Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
Paseo Verde	19	19	Leased/Issued	No	New construction development 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.

Property Name	# of Project-Based Vouchers		Status at End of Plan Year	RAD?	Description of Project
	Planned	Actual			
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. Supportive services are provided.
Preston St	7	7	Leased/Issued	No	Existing site for low-income families in the West Philadelphia area sponsored by Mission First Housing Group. Supportive services are provided.
Queen Lane	55	55	Leased/Issued	Yes	Conversion of existing PAPMC development sponsored by PHA.
Ray's Place	17	17	Leased/Issued	No	New construction development for homeless persons with a serious mental illness in North Philadelphia sponsored by Project Home. Supportive services are provided.
Reed St	8	8	Leased/Issued	No	Existing site for low-income families in South Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
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	49	49	Leased/Issued	Yes	Adaptive reuse to convert elementary school into housing for homeless veterans sponsored by HELP USA. Supportive services are provided.
Rhawn and Academy	51	48	Committed	No	Existing project in the Northeast area at 714-718 Rhawn St and 11901-13 Academy Rd for disabled homeless or at risk of homelessness sponsored by Mission First.
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 Community Homes	1	1	Leased/Issued	No	Existing site for low-income families in West Philadelphia sponsored by Friends Rehab. 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. Supportive services are provided.
Sarah Allen V	3	3	Leased/Issued	No	Existing site for low-income families in West Philadelphia sponsored by Friends Rehab. Supportive services are provided.

Property Name	# of Project-Based Vouchers		Status at End of Plan Year	RAD?	Description of Project
	Planned	Actual			
Sartain School	35	35	Leased/Issued	No	Existing site for seniors in North Philadelphia sponsored by Sartain School Venture.
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 Hunt 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
Sheff/Wingate St	8	8	Leased/Issued	No	Existing site for low-income families in Northeast Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
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. Supportive services are provided.
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	13	13	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. Supportive services are provided.
St. John Neumann Place	52	52	Committed	No	Existing project in the Greys Ferry area at 2600 Moore St for low-income elderly families sponsored by Catholic Housing and Community Services.
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 Plan 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	New construction development for homeless low-income individuals in North Philadelphia 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.
Vernon House	68	68	Committed	No	Existing project in the Strawberry Mansion area at 3226 Clifford St for low-income elderly/disabled families sponsored by Pennrose Management.
Villas De Caribe	44	44	Committed	No	Existing project in the Fairhill area at 161-171 W Allegheny Ave for low-income families sponsored by HACE.
Villas De Hace	18	18	Committed	No	Existing project in the Ludlow area at 1426-44 N 6th St and 1429-31 N Marshall St for low-income families sponsored by HACE.
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. Supportive services are provided.
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	New construction development 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.
	4,375	4,370	Total 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 slightly less than planned due to normal variations in program activity. The owner of two (2) units at the Osage Ave property sold these units and the contract has been closed. Additionally, three (3) units at Rhawn and Academy did not pass HQS inspection, and the award was subsequently reduced to remove these units from the contract.

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 2023 not discussed elsewhere in the Report and an update on planned initiatives that were identified in the FY 2023 Annual Plan.

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

Site	Description of Project from FY 23 Plan	Status as of March 31, 2023
Brooklyn Heights	PHA will continue to pursue the acquisition (PRA) of land in the Mill Creek neighborhood and is working to address complex title issues in order to develop approximately 32 units on the property.	PHA continued to pursue the acquisition (PRA) of land in the Mill Creek neighborhood and development of units on the property. During FY 2023, PHA worked to address complex title issues impacting plans to develop these units.
Gordon Street Phase II (Strawberry Mansion)	PHA will continue 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.	PHA continued preparations for several rental developments in the Strawberry Mansion section of the City, which will include acquisition of publicly and privately owned parcels in the neighborhood. In FY 2023, PHA worked with a development partner on a rental phase which will include approximately 70 rental units near the newly developed Gordon Apartments.
Falls Ridge	PHA listed vacant land at the former Schuylkill Falls public housing development for sale at fair market value and accepted an offer proposing construction of approximately 150 market rate units on the vacant land.	Though PHA had accepted an offer proposing construction of approximately 150 market rate units on the vacant land at the former Schuylkill Falls, the selected developer was unable to finalize zoning approvals. Therefore, PHA terminated this agreement. PHA intends to relist the property for fair market value in FY 2024.
Sharswood Development	PHA was awarded a \$30 million CNI grant to implement the Sharswood Transformation Plan in 2020. See narrative for details on Sharswood Transformation Plan activities.	See narrative in MTW Initiatives and Accomplishments for details on Sharswood Transformation Plan activities.

Site	Description of Project from FY 23 Plan	Status as of March 31, 2023
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. PHA anticipates that construction may commence in FY 2023, once the financing plan has been finalized.	Discussions on the respective roles of the private developer and PHA, project financing and the final development configuration were ongoing in FY 2023. PHA will apply to demolish and/or dispose of the property based on the outcome of these discussions.
Bartram Village	PHA has 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. HUD accepted the Bartram Village/Kingsessing Transformation Plan in April 2020. Implementation of “action activities” funded under the CNI Planning Grant is ongoing. Subject to funding availability, PHA anticipates that the first phase of redevelopment at Bartram will commence in FY 2023. PHA intends to apply for a CNI Implementation grant in the future.	PHA’s planned redevelopment of the Bartram Village public housing development achieved a major milestone with PHFA’s October 2022 award of 9% Low Income Housing Tax Credits for the first off-site construction phase. Closing on the first phase is projected for FY 2024. In addition, PHA worked with development partner, Pennrose LLC, to prepare a \$50 million Choice Neighborhoods Implementation grant proposal to HUD, which was submitted in January 2023.
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 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. Renovations to the auditorium are planned for the future, subject to funding availability.	In FY 2023, PHA continued to expand resident programs and support available at the Vaux Community Building, through partnerships with the Temple-Lenfest North Philadelphia Workforce Initiative, CVS and many others. At Vaux, PHA continued to provide comprehensive employment and training services on-site at the Workforce Center and job search support through the Section 3 Resource Center and Job Bank.
Vacant Lot Disposition	PHA owns over 700 vacant lot parcels. PHA plans to dispose of some of the properties for fair market value, to the Land Bank, to a PHA affiliate or alternate means. In partnership with Councilmember María Quiñonez Sánchez and nonprofit affordable housing developers in the 7th District, PHA plans to develop 240 vacant lots and shells into long-term affordable housing with a twenty-year restrictive covenant.	In partnership with various City Councilmembers and nonprofit affordable housing developers throughout the City, PHA continued planning and preparations to develop up to 240 vacant lots and shells into long-term affordable housing with a twenty-year restrictive covenant.

Site	Description of Project from FY 23 Plan	Status as of March 31, 2023
Fairhill Acquisition/ Redevelopment	PHA will continue 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.	PHA continued to plan for the complete redevelopment of the Fairhill Apartments public housing development in multiple on and off-site phases. The redevelopment plan calls for one-for-one replacement of the existing 264 housing units plus 100 additional units; reconfiguration of streets; demolition of low-rise buildings; rehabilitation of two tower buildings as senior housing; development of replacement family units on and off-site; and, rehabilitation of the nearby City-owned Hartranft Community Center. PHA moved forward with plans to acquire approximately 100 off-site parcels.
Harrison Plaza	PHA is redeveloping the existing Harrison Plaza tower into a senior preference building and converting it to PBV under the RAD program. PHA is finalizing plans to rehabilitate and convert the remaining buildings at the site to RAD.	At Harrison Plaza, PHA completed rehabilitation of the Senior Tower. PHA is finalizing plans to rehabilitate and convert the remaining low-rise buildings/units at the site to RAD and/or to develop an alternative comprehensive redevelopment plan. PHA may submit an application for Choice Neighborhoods Planning grant for this site and the Yorktown neighborhood.
West Park Apartments	PHA issued a developer partner RFP to work with on a comprehensive redevelopment and RAD conversion plan for West Park Apartments campus which may could include mixed use development.	PHA made major progress towards the redevelopment of West Park Apartments, including finalizing the overall \$450 million plan to develop 1,000 mixed-income units; selecting two development partners (LMXD and MSquared); and, successfully relocating all residents. Upon completion, 600 units will be targeted for households earning up to 60% of Area Median Income - including 327 units public housing replacement units - and the remaining units will be market-rate housing. The plan, which was developed in consultation with the community and approved by the PHA Board in January 2023, will include the substantial rehab of three (3) existing high-rise towers; new construction of a midrise building for seniors; and, development of low-rise apartment buildings and new family townhomes throughout the site and on an adjacent lot. Ground floor commercial spaces will be incorporated into the development plan along with extensive site reconfiguration, infrastructure improvements and a new gateway to Market Street. PHA is currently working with the developers to

Site	Description of Project from FY 23 Plan	Status as of March 31, 2023
		finalize financing. Subject to financing and other approvals, the first phase of construction is projected to start late in FY 2024.
Various	PHA is actively pursuing opportunities to expand affordable housing by utilizing HUD’s new Faircloth-to-RAD conversion program. Under this initiative, PHA may enter into partnerships and/or directly develop new public housing that will be converted to PBV assistance upon completion.	As of the end of FY 2023, PHA is utilizing the Faircloth-to-RAD conversion program for four (4) new construction developments: NewCourtland at St. Barts II, Father Augustus Tolton Place, Compassion Senior Living, and Sharswood Phase III.
Walton School	PHA, either directly or with a third-party developer partner, intends to rehabilitate this former school building into approximately 51 rental units for seniors.	PHA continued to plan to rehabilitate this former school building into approximately 51 rental units for seniors.
Brewerytown Homeownership Initiative	PHA intends to issue a Request for Proposals to develop affordable homeownership units on scattered sites that were part of a RAD conversion in the Brewerytown section of Philadelphia.	PHA issued a Request for Proposals to develop affordable homeownership units on scattered sites that were part of a RAD conversion in the Brewerytown section of Philadelphia.
Norris/North Central	PHA intends to develop a remaining parcel of the former Norris homes public housing site (possibly with a third-party developer) into a mixed use development.	The Choice Neighborhood Transformation Plan for North Central/Norris was successfully completed in FY 2023 including extensive community improvements and construction of 272 rental, 30 homeownership units and a community center. PHA is continuing to collaborate with the City on the final grant close-out and will also continue to serve as People Lead Partner including overseeing endowment-funded service activities for Norris’ residents.
Suffolk Manor	PHA is exploring a RAD conversion of the current Suffolk Manor apartments along with improvements to the development.	PHA has requested approval from HUD to convert Suffolk Manor, an existing PAPMC public housing development to RAD, and anticipates that, subject to financing and other approvals, closing may occur in FY 2024.
2112 Ridge	PHA intends to build a mixed-use building that will include affordable housing for the underserved homeless and housing insecure LGBTQIA young adult population along with ground floor retail.	This project is on-going; PHA continued planning in FY 2023 for this mixed-use building.

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 asset repositioning strategy and efforts to secure new capital resources necessary for the long-term preservation and expansion 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 30 RAD development transactions that have closed through FY 2023, including transactions that

closed in prior periods. Including only those RAD projects that have already closed, total development costs exceed \$685 million including over \$303 million in private equity. (This reflects a correction from the information provided in the FY 2022 MTW Report.)

Table 5: RAD Conversions: Closed Transactions through FY 2023

Property Name	RAD Units	Description
Blumberg Phase I	51	Transfer of Assistance
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
Southwark Plaza (PA2-121)	470	Conversion of existing AME public housing
Strawberry Mansion	55	Transfer of Assistance
Haddington III	48	Transfer of Assistance
Roberto Clemente House	38	Transfer of Assistance
Norris Apartments II (CNI)	74	CNI RAD Conversion
Cantrell Place	40	Transfer of Assistance
Witherspoon Senior Apartments	40	Transfer of Assistance
1315 N. 8th Street	25	Transfer of Assistance
Blumberg Phase II-Senior Building	94	Conversion of existing public housing
Norris Sq Community Alliance Scattered Sites	29	Transfer of Assistance
Plymouth Hall (PA2-079)	53	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
Norris Apartments Phase V (CNI)	45	CNI RAD Conversion
Reynolds School	49	Transfer of Assistance
27th and Susquehanna	78	Transfer of Assistance
Sharswood I (Hunt)	30	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
Sharswood II (Hunt)	30	Transfer of Assistance
Sharswood 4a	58	Transfer of Assistance
Janney Apartments	29	Transfer of Assistance
TOTAL	1,970	

In addition to the units and developments listed in Table 5, PHA also made progress planning for RAD conversions anticipated for FY 2024, which will include an additional 2,545 units at 16

developments. See FY 2024 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 currently estimated at \$1.5 billion and growing. However, due to obsolescence at some sites and other factors, PHA currently estimates the actual cost to preserve the existing portfolio (which will require complete redevelopment at multiple sites) is approximately \$3.45 billion. PHA can address only a small fraction of its capital needs with existing funding. More than 75% of all PHA units were built over 40 years ago and over 55% were built 60 or more years ago. 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 2023.

Table 6: Actual Capital Expenditures in FY 2023

Project Type/Project Description	Site Name	Actual Expenses
504 Site Modifications / Fair Hsg	Johnson Homes	\$28,087.87
504 Site Modifications / Fair Hsg	Richard Allen	\$5,857.75
504 Site Modifications / Fair Hsg	Raymond Rosen	\$31,357.94
504 Site Modifications / Fair Hsg	Harrison Plaza	\$23,782.43
504 Site Modifications / Fair Hsg	Arch Homes	\$1,095.95
504 Site Modifications / Fair Hsg	Spring Garden Apartments	\$13,246.78
504 Site Modifications / Fair Hsg	Queen Lane Apartments	\$4,913.00
504 Site Modifications / Fair Hsg	Hill Creek	\$52,990.88
504 Site Modifications / Fair Hsg	Abbotsford Homes	\$19,142.97
504 Site Modifications / Fair Hsg	Oxford Village	\$21,933.21
504 Site Modifications / Fair Hsg	Whitehall Apartments	\$6,095.58
504 Site Modifications / Fair Hsg	Haddington Homes	\$16,505.06
504 Site Modifications / Fair Hsg	Champlost Homes	\$15,195.09
504 Site Modifications / Fair Hsg	Haverford Homes	\$1,057.26
504 Site Modifications / Fair Hsg	Morton Homes	\$24,707.48
504 Site Modifications / Fair Hsg	College View	\$4,461.16
504 Site Modifications / Fair Hsg	Cecil B Moore	\$1,429.61
504 Site Modifications / Fair Hsg	Arlene Homes	\$880.00
504 Site Modifications / Fair Hsg	Haddington	\$56,533.04
504 Site Modifications / Fair Hsg	Mantua	\$25,989.01

Project Type/Project Description	Site Name	Actual Expenses
504 Site Modifications / Fair Hsg	Kingsessing	\$79,056.37
504 Site Modifications / Fair Hsg	Germantown/Hunting Park	\$61,285.15
504 Site Modifications / Fair Hsg	Fairhill Square	\$49,268.69
504 Site Modifications / Fair Hsg	Francisville	\$46,721.27
504 Site Modifications / Fair Hsg	Ludlow	\$58,708.03
504 Site Modifications / Fair Hsg	Susquehanna	\$20,900.13
504 Site Modifications / Fair Hsg	Strawberry Mansion	\$54,760.88
504 Site Modifications / Fair Hsg	Oxford Jefferson	\$25,127.20
504 Site Modifications / Fair Hsg	Wilson Park - Senior	\$35,412.69
504 unit modification/fair hsg	Abbotsford Homes	\$22,588.65
504 unit modification/fair hsg	Arch Homes	\$21,278.32
504 unit modification/fair hsg	Arlene Homes	\$186.99
504 unit modification/fair hsg	Bartram Village	\$7,470.96
504 unit modification/fair hsg	Bentley Hall	\$1,837.50
504 unit modification/fair hsg	Cambridge Plaza I	\$46.97
504 unit modification/fair hsg	Cassie L Holley	\$12,843.24
504 unit modification/fair hsg	Cecil B Moore	\$114.69
504 unit modification/fair hsg	Champlost Homes	\$3,150.16
504 unit modification/fair hsg	College View	\$950.45
504 unit modification/fair hsg	Emlen Arms	\$170,590.13
504 unit modification/fair hsg	Fairhill Apartments	\$678.59
504 unit modification/fair hsg	Gladys B Jacobs	\$52,586.56
504 unit modification/fair hsg	Haddington Homes	\$31,349.49
504 unit modification/fair hsg	Harrison Plaza	\$6,264.14
504 unit modification/fair hsg	Hill Creek	\$41,634.06
504 unit modification/fair hsg	Holmecrest Homes	\$9,255.65
504 unit modification/fair hsg	Johnson Homes	\$26,902.12
504 unit modification/fair hsg	Katie B Jackson	\$1,792.97
504 unit modification/fair hsg	Morton Homes	\$37,980.29
504 unit modification/fair hsg	Oxford Village	\$4,767.14
504 unit modification/fair hsg	Queen's Row Low Income	\$86.71
504 unit modification/fair hsg	Raymond Rosen	\$45,531.21
504 unit modification/fair hsg	Richard Allen	\$14,951.28
504 unit modification/fair hsg	Fairhill Square	\$59,496.56
504 unit modification/fair hsg	Francisville	\$47,745.85
504 unit modification/fair hsg	Germantown/Hunting Park	\$21,014.31
504 unit modification/fair hsg	Haddington	\$62,827.57
504 unit modification/fair hsg	Kingsessing	\$63,297.56
504 unit modification/fair hsg	Ludlow	\$71,186.68
504 unit modification/fair hsg	Mantua	\$32,633.71

Project Type/Project Description	Site Name	Actual Expenses
504 unit modification/fair hsg	Oxford Jefferson	\$26,086.38
504 unit modification/fair hsg	Strawberry Mansion	\$16,418.45
504 unit modification/fair hsg	Susquehanna	\$7,729.39
504 unit modification/fair hsg	Spring Garden Apartments	\$19,675.52
504 unit modification/fair hsg	West Park Apartments	\$536.79
504 unit modification/fair hsg	Westpark Plaza	\$1,004.40
504 unit modification/fair hsg	Whitehall Apartments	\$14,238.18
504 unit modification/fair hsg	Wilson Park - Senior	\$26,853.34
Comp unit mod, SMART II	Fairhill Square	\$473,756.42
Comp unit mod, SMART II	Francisville	\$123,308.75
Comp unit mod, SMART II	Germantown/Hunting Park	\$284,865.94
Comp unit mod, SMART II	Haddington	\$262,460.13
Comp unit mod, SMART II	Kingsessing	\$247,605.08
Comp unit mod, SMART II	Ludlow	\$145,577.58
Comp unit mod, SMART II	Mantua	\$139,852.15
Comp unit mod, SMART II	Oxford Jefferson	\$135,631.56
Comp unit mod, SMART II	Strawberry Mansion	\$407,998.01
Comp unit mod, SMART II	Susquehanna	\$1,069,969.92
Concrete replacement	Bartram Village	\$1,500.00
Concrete replacement	Emlen Arms	\$62,975.00
Concrete replacement	Hill Creek	\$599,616.00
Concrete replacement	Johnson Homes	\$26,009.00
Concrete replacement	Raymond Rosen	\$11,745.50
Concrete replacement	Richard Allen	\$24,903.50
Concrete replacement	Francisville	\$7,500.00
Concrete replacement	Germantown/Hunting Park	\$16,998.00
Concrete replacement	Haddington	\$12,578.00
Concrete replacement	Kingsessing	\$18,246.00
Concrete replacement	Mantua	\$12,890.00
Concrete replacement	Strawberry Mansion	\$5,693.10
Concrete replacement	Susquehanna	\$1,500.00
Concrete replacement	Spring Garden Apartments	\$28,369.23
Concrete replacement	West Park Apartments	\$5,697.00
Concrete replacement	Whitehall Apartments	\$23,062.00
Concrete replacement	Oxford Jefferson	\$8,266.02
Demolition	Richard Allen	\$240,600.00
Electrical	Hill Creek	\$36,000.00
Electrical distribution system	Fairhill Square	\$3,754.07
Electrical distribution system	Spring Garden Apartments	\$14,207.00
Environmental hazard abate	College View	\$13,504.02

Project Type/Project Description	Site Name	Actual Expenses
Environmental hazard abate	Wilson Park - Senior	\$12,301.14
Exterior bldg structures	College View	\$123,293.63
Exterior bldg structures	Richard Allen	\$68,250.00
Exterior bldg structures	Germantown/Hunting Park	\$26,214.22
Exterior bldg structures	Susquehanna	\$13,170.00
Exterior doors	Cassie L Holley	\$169,050.00
Exterior doors	Katie B Jackson	\$16,500.00
Fire code compliance	Abbottsford Homes	\$2.04
Fire code compliance	Arlene Homes	\$749,199.82
Fire code compliance	Cecil B Moore	\$54,377.85
Fire code compliance	Champlost Homes	\$84,496.00
Fire code compliance	Hill Creek	\$105,439.62
Fire code compliance	Holmecrest Homes	\$137,772.35
Fire code compliance	Queen's Row Low Income	\$1,614.65
Fire code compliance	Raymond Rosen	\$605,515.64
Fire code compliance	Ludlow	\$3,500.00
Fire code compliance	Oxford Jefferson	\$2,750.00
Fire code compliance	Spring Garden Apartments	\$88,829.21
Fire safety	Bartram Village	\$10,895.78
Fire safety	Cassie L Holley	\$4,789.80
Fire safety	Holmecrest Homes	\$4,011.15
Fire safety	Fairhill Square	\$11,111.46
Fire safety	Francisville	\$199,287.26
Fire safety	Ludlow	\$10,425.17
Fire safety	Mantua	\$46,329.50
Fire safety	Oxford Jefferson	\$32,678.57
Fire safety	Strawberry Mansion	\$98,596.55
Fire safety	Susquehanna	\$4,343.66
Fire safety	Westpark Plaza	\$26,073.00
Infrastructure	Harrison Plaza	\$175,869.46
Interior wall repair	Wilson Park - Senior	\$91,545.97
Plumbing upgrades	Oxford Village	\$83,069.00
Plumbing upgrades	Scattered Sites-Haddington	\$7,950.00
Plumbing upgrades	Whitehall Apartments	\$5,900.00
Public Infrastructure	PHA Consolidated Headquarters	\$727,640.00
Public Infrastructure	Richard Allen IIIA	\$38,350.00
Roof repair/replacement	Bartram Village	\$2,392.00
Roof repair/replacement	Emlen Arms	\$7,663.84
Roof repair/replacement	Gladys B Jacobs	\$20,750.00
Roof repair/replacement	Holmecrest Homes	\$18,895.28

Project Type/Project Description	Site Name	Actual Expenses
Roof repair/replacement	Raymond Rosen	\$576,168.75
Roof repair/replacement	Fairhill Square	\$86,802.91
Roof repair/replacement	Francisville	\$97,742.98
Roof repair/replacement	Germantown/Hunting Park	\$27,803.60
Roof repair/replacement	Haddington	\$44,853.50
Roof repair/replacement	Kingsessing	\$77,000.64
Roof repair/replacement	Ludlow	\$8,297.25
Roof repair/replacement	Mantua	\$284,930.26
Roof repair/replacement	Oxford Jefferson	\$10,000.00
Roof repair/replacement	Susquehanna	\$95,044.65
Roof repair/replacement	Raymond Rosen	\$257,239.55
Roof repair/replacement	Wilson Park - Senior	\$319,942.14
Unit Renovation	Oxford Jefferson	\$6,490.44
EPC PHASE II FY 2022	Cecil B. Moore	\$399,360.00
EPC PHASE IV FY 2022	Raymond Rosen	\$1,940,624.64
EPC PHASE IV FY 2022	Haverford Homes	\$285,000.40
EPC PHASE IV FY 2022	Bentley Hall	\$92,788.98
EPC PHASE IV FY 2022	Cassie L Holley	\$31,442.00
EPC PHASE IV FY 2022	Gladys B Jacobs	\$91,753.79
EPC PHASE IV FY 2022	Morton Homes	\$566,273.00
EPC PHASE IV FY 2022	Parkview Apartments	\$474,472.00
EPC PHASE IV FY 2022	Queen Lane Apartments	\$25,244.00
EPC PHASE IV FY 2022	Ludlow	\$22,125.40
EPC PHASE IV FY 2022	Strawberry Mansion	\$25,994.17
EPC PHASE IV FY 2022	Spring Garden Apartments	\$1,022,590.79
A & Indiana Mill Redevelopment	A & Indiana Mill Redevelopment	\$250,000.00
Allegheny West Foundation	Allegheny West Foundation	\$250,000.00
Beyond Foster Care On Ridge	Beyond Foster Care On Ridge	\$513,646.66
Blumberg 4A 60 Units	Blumberg 4A 60 Units	\$10,616,665.41
Blumberg Phase 6A	Blumberg Phase 6A	\$961,744.95
Fairhill Phase I	Fairhill Apartments	\$653,221.95
Fairhill Phase 2	Fairhill Phase 2	\$183,950.00
Harlan Street	Harlan Street	\$169,407.78
Hartanft Community Center	Hartanft Community Center	\$18,100.00
HUNT Phase III	Blumberg	\$905,989.78
Hunt Sharswood Phase II	Hunt Sharswood Phase II	\$4,096,924.62
Katie B Jackson	Katie B Jackson	\$105,127.00
North 10 Philadelphia	North 10 Philadelphia	\$500,000.00
Rafael Porrata - Doria Place	Rafael Porrata - Doria Place	\$500,000.00
West Mill Place	West Mill Place	\$250,000.00

Project Type/Project Description	Site Name	Actual Expenses
TOTAL		\$36,974,332.03

B. Leasing Information

i. Actual Number of Households Served

PHA provided housing assistance to approximately 31,562 households in FY 2023 through Public Housing (n=11,487), HCV (n=20,035) - including both MTW and Non-MTW Special Purpose vouchers - and local, non-traditional MTW programs (n=40). Excluding non-MTW vouchers, the total number of MTW-only households served was 29,775 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	137,839	11,891	11,487
MTW Housing Choice Vouchers (HCV) Utilized	221,292	218,964	18,441	18,247
Local, Non-Traditional: Tenant-Based	0	0	0	0
Local, Non-Traditional: Property-Based	492	474	41	40
Local, Non-Traditional: Homeownership	0	0	0	0
Planned/Actual Totals	364,476	357,277	30,373	29,774

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.

Note that all Family Unification Program (FUP) vouchers are reported in Table 7, as both allocations of FUP voucher are part of the MTW voucher portfolio.

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	5,340	4,727	445	394
FUP (see note above)	1,800	0	150	0
VASH	9,720	8,232	810	686
VASH Project Based	168	24	14	2

Moderate Rehab	1,692	1,524	141	127
SRO	3,552	2,940	296	245
EHV	0	3,736	0	311
Foster Youth to Independence	0	271	0	23
Planned/Actual Totals	22,272	21,454	1,856	1,788

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*	492	474	41	40
Homeownership	N/A	0	0	0	0
Planned/Actual Totals		492	474	41	40

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 2023, a total of 46 residents became first-time homebuyers through PHA’s various homeownership programs, including eight (8) public housing residents who purchased scattered site units through the 5h program, 14 HCV participants who utilized vouchers to purchase private market unit, and 24 other 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>To increase utilization, PHA pulled and screened remaining applicants on the HCV waiting list. As a result, over 500 new voucher holders leased a unit in FY 2023. Over 900 new voucher holders are currently searching for a unit. As noted below, PHA opened the HCV waiting list for a two-week period in early 2023.</p> <p>PHA also implemented a series of financial incentives designed to increase the number of housing options currently available for PHA’s voucher holders, recruit new landlords to participate and encourage existing ones to expand their HCV portfolio. These included signing bonuses up to \$500 for any property owner or landlord that rents to a PHA voucher holder and submits the required PHA paperwork. A special bonus was also available to</p>

Housing Program	Description of Actual Leasing Issues and Possible Solutions
	landlords who lease a unit to an EHV participant. A \$1,000 bonus was also made available to landlords who participate in HCV’s Housing Opportunity Program and successfully rent a unit to an HCV participant in a qualified opportunity area. Since the incentive program started, over 2,500 new units were leased to HCV voucher holders and over \$1 million in incentives have been paid to HCV Landlords.

C. Waiting List Information

i. Actual Waiting List Information

In FY 2023, 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 operates a centralized “first available” waitlist for referral programs and for applicants who elect 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 2023.

PHA re-opened the HCV waiting list for a two-week period in FY 2023. The re-opening was the first-time PHA has accepted HCV applications since 2010, following a comprehensive outreach campaign to increase awareness and facilitate equal access to the application process, including but not limited to persons with disabilities, seniors and individuals with limited English proficiency. PHA also established partnerships with key agencies and community organizations and provided training and support so that partners could assist applicants in submitting their applications. PHA also provided resources and support directly to applicants who visited agency headquarters during the waiting list opening. During the re-opening, over 37,000 individuals and families submitted an application. Thereafter, PHA conducted a lottery to randomly select 10,000 applicants to be added to the waiting list. PHA provided a preference to applicants who indicated that they lived, worked or were hired to work in the city of Philadelphia.

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 that are owned by PHA affiliates.

Table 12 provides information on HCV, conventional and scattered site public housing and PAPMC-managed waiting list as of March 31, 2023.

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	10,000	Closed	Yes
HCV Project Based (PAPMC managed only)	Site-Based	30,335	Open	No*
Public Housing 1 – Conventional & Scattered Sites	First Available and Site-Based	15,403	Partially Open	No*
Public Housing 2 – PAPMC Tax Credit**	Site-Based	50,246	Open	No*

*PHA did not open these waiting lists during the fiscal year; they were continuously open throughout the fiscal year.

**Units funded with LIHTC and managed by PAPMC

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	2,392	9,996	219	196	89	2,511	15,403
MTW Public Housing Units*	6,694	35,845	819	562	372	5,954	50,246
MTW Housing Choice Voucher Program	1,570	7,980	83	113	66	188	10,000
PBV/PHA Owned	4,229	22,839	482	303	292	2,190	30,335
Total	14,885	76,660	1,603	1,174	819	10,843	105,984

*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	1,521	13,858	24	15,403
MTW Public Housing Units *	5,999	44,180	67	50,246
MTW Housing Choice Voucher Program	1,228	8,643	129	10,000
PBV/PHA Owned	4,165	26,137	33	30,335
Total	12,913	92,818	253	105,984

* 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

PHA serves many of Philadelphia’s lowest-income families and individuals. More than 90% of households served are very low income, i.e. households with incomes at or below 50% of Area Median Income (AMI, with the vast majority having incomes that are less than 30% of AMI. 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	3
Below 30% Area Median Income	16
Total Local, Non-Traditional Households Admitted	19

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 2023

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	13,696	45.57%	N/A
2 Person	N/A	5,936	19.75%	N/A
3 Person	N/A	4,557	15.16%	N/A
4 Person	N/A	3,027	10.07%	N/A
5 Person	N/A	1,593	5.30%	N/A
6+ Person	N/A	1,245	4.14%	N/A
TOTAL	N/A	30,054	100%	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

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 #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	44	In the FSS program, self-sufficiency is defined as graduation from the five-year local FSS program.
	0	Households Duplicated Across MTW Activities
	45	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 2023.

Actual Significant Changes

There were no significant changes to this activity in FY 2023.

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	N/A	N/A

**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 2023, PHA served 53 families under the Nursing Home Transition Initiative. Under this activity, PHA receives 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 NHTI referrals to the HCV program. PHA will continue to provide HCV subsidies to all NHTI participants referred prior to June 30, 2020.

Public Housing partners with the Philadelphia Corporation for Aging (PCA) continues to receive new referrals for the Nursing Home Transition Initiative in FY 2023; 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 2023.

Actual Significant Changes

There were no significant changes to this activity in FY 2023.

Changes to Metrics

No changes were made to the metrics in the FY 2023 Annual Plan.

Challenges in Achieving Benchmarks & Possible Strategies

PHA met all benchmarks set for this activity.

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)	15 – Ongoing (NHT)	41 – HCV 12 - PH	Yes

** Reflects the number of NHT participants assisted through the Public Housing program.*

<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 – Nursing Home Transition (NHT)	15 – Ongoing (NHT)	41 – HCV 12 - PH	Yes

** Reflects the number of NHT participants assisted through the Public Housing program.*

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.
- *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.
- *Exception Payment Standards* - PHA is authorized to establish exception payment standards for individual units within a SAFMR zip code and remove the 120% limitation for units in neighborhoods undergoing significant revitalization where the SAFMR is not consistent with its property values and rents. In FY 2023, PHA also received approval to establish exception payments standards for specific areas of revitalization, identified by blocks, groups of blocks, or other geographic areas, also removing the 120% limitation for such areas. While all of the

units in the zip code with the lower SAFMR may not be in the revitalized area, those that are, would be at a significant disadvantage for inclusion in the HCV program if existing SAFMRs and payment standards were applied. These changes will provide PHA with additional flexibility to establish exception payment standard areas and aligns with PHA's broader strategy to encourage voucher-holders to lease in areas of opportunity and decrease density in high poverty neighborhoods. Exception payment standards will be consistent with market conditions in the surrounding area and prevent financial hardship for those voucher-holders who choose to lease in these areas. As with all other HCV units, PHA will include documentation in the file that the rent is reasonable when setting payment standards outside of the allowable range without HUD approval.

- *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.

In FY 2023, PHA continued to temporarily lift the limit on voluntary interim rent reductions for non-exempt families due to the impact of the COVID-19 pandemic. PHA will make a determination on re-imposing the limit in FY 2024.

PHA may apply the rent and recertification policies noted above to Public Housing households who are living in housing operated by PAPMC, subject to investor approval as needed.

PHA has not yet implemented flexibility to require families to enroll in the TAP or PECO programs. In FY 2023, PHA conducted outreach to landlords to inform them of the benefits and requirements of the TAP program, including permitting tenants to be responsible for payment of water utilities.

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 a negative financial impact on 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 2023, 11 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 2023, PHA received 17 hardship requests related to this activity for both the HCV and Public Housing Program; all requests were approved.

Actual Non-Significant Changes

In FY 2023, PHA established exception payment standards for specific areas of revitalization, identified by blocks, groups of blocks or other geographic areas, and remove the 120% limitation for those areas undergoing significant revitalization. This change will provide PHA with additional flexibility to establish exception payment standard areas and aligns with PHA’s broader strategy to encourage voucher-holders to lease in areas of opportunity and decrease density in high poverty neighborhoods. Exception payment standards will be consistent with market conditions in the surrounding area and prevent financial hardship for those voucher-holders who choose to lease in these areas. As with all other HCV units, PHA will include documentation in the file that the rent

is reasonable when setting payment standards outside of the allowable range without HUD approval.

Actual Significant Changes

There were no significant changes to this activity in FY 2023.

Changes to Metrics

No changes were made to the metrics in the FY 2023 Annual Plan.

Challenges in Achieving Benchmarks & Possible Strategies

PHA did not meet the benchmark for average error rate for the HCV program in FY 2023, as PHA transitioned from pandemic-related waiver policies allowed under the CARES Act and MTW Emergency Waivers activity.

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).	56,110 hours (estimate)	29,000 hours	26,305 hours	Yes

**Includes regular and interim recertifications for both HCV and PH programs.*

<i>CE #3: Decrease in Error Rate of Task Execution *</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average error rate in completing a task as a percentage (decrease).	5%	5%	0% - PH 6% - HCV	No

** The error rate for Public Housing is based on an independent audit; HCV's error rate is based on Quality Control reviews. 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.*

<i>CE #5: Increase in Agency Rental Revenue – Utility Allowance Policy*</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Rental revenue in dollars (increase).	\$606,753	\$606,753	\$641,370	Yes

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

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 two (2) UBV projects resulting in 146 new UBV housing opportunities, in addition to providing continuing subsidy for 4,370 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 2023, seven (7) 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 2023.

Actual Significant Changes

There were no significant changes to this activity in FY 2023.

Changes to Metrics

Benchmarks were updated to reflect UBV activity in FY 2023.

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 2023.

Metrics:

HC #1: Additional Units of Housing Made Available *				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase).	0 units	349 units	30 units	No
<i>*HUD requires this metric to track only <u>newly constructed and/or rehabilitated</u> 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>				
HC #5: Increase in Resident Mobility				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	0 households	746 households	146 households	No
<i>* Represents units project-based voucher units newly under HAP or AHAP in FY 2023.</i>				
HC #7: Households Assisted by Services that Increase Housing Choice				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase housing choice (increase).	0 households	2,287 households	2,367 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, 26 households successfully leased up as a result of an MTW transfer. Of those approved to transfer from PH to HCV, 15 were leased as of the end of the fiscal year and 13 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

PHA may allocate up to five (5) homeownership vouchers for Public Housing residents who graduate from the Jobs Plus program and transfer these residents from the Public Housing to HCV

Homeownership program. Graduates will be required to complete the homeownership-counseling courses and meet other eligibility requirements for receiving a homeownership voucher. In FY 2022, PHA received a \$2.9 million Jobs Plus grant for Wilson Park, a place-based initiative which combines traditional self-sufficiency support with rent incentives. PHA anticipates that the allocation of homeownership vouchers will further incentivize families to participate and graduate from the Jobs Plus program.

Actual Significant Changes

There were no significant changes to this activity in FY 2023.

Changes to Metrics

No changes were made to the metrics in the FY 2023 Annual Plan.

Challenges in Achieving Benchmarks & Possible Strategies

PHA met all benchmarks set for this activity.

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 HCV – 4.5 years in FY 2015	PH < 1 year HCV < 1 year	PH < 1 year HCV < 1 year	Yes

* *Waiting list for MTW Transfers.*

ACTIVITY 2005-3: PROGRAM EFFICIENCIES *(Formerly 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.

As part of the Local Forms initiative, PHA combined the HUD-9886 Authorization for the Release of Information/Privacy Act form with the PHA Authorization of Release Form in order to reduce redundancies and streamline the verification process by reducing the number of signatures required and allowing the household to sign electronically. PHA also developed a local HAP Contract and Tenancy Addendum as part of the Local Forms initiative. The new HAP contract is integrated in the PHA's landlord portal system to streamline and expedite the leasing process.

In FY 2023, a total of 1,380 families were approved to transfer to new HCV units under the elective moves portion of this activity. Of those approved to transfer, 53 were approved for a transfer as a result of VAWA protections or safety concerns, and 13 were approved for Reasonable Accommodation. Where portability is concerned, PHA received 534 port out requests, of which 229 were approved. The following is a summary of the approved port-out requests for FY 2023:

- 6 based on education
- 69 based on employment
- 72 based on medical or disability
- 82 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

PHA implemented a local tenant-based HAP contract and Tenancy Addendum, in concert with approved MTW policies. In FY 2023, PHA also worked to develop a local PBV HAP Contract and Tenancy Addendum, consistent with MTW policies approved under Activity 2004-3: Unit-Based Leasing and Development Program.

Actual Significant Changes

There were no significant changes to this activity in FY 2023.

Changes to Metrics

No changes were made to the metrics identified in the FY 2023 Annual Plan.

Challenges in Achieving Benchmarks & Possible Strategies

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

Metrics:

<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)	2,500 hours	1,725 hours	Yes
Criteria for Portability Moves: Total time to complete the task in staff hours (decrease).	540 hours (based on FY 12 port activity)	264 hours	668 hours	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

Description/Impact/Update

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, construction of Rafael Porrata Doria Place, a new Public Housing development consisting of 30 units, was completed in FY 2023. PHA continued to work with its developer partners on an additional 304 Public Housing units at nine (9) developments during FY 2023. Pursuant to PHA's FY 2024 MTW Plan, some or all of these developments may be converted to project-based assistance under the Faircloth-to-RAD initiative or RAD transfer of assistance.

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 2023.

Actual Significant Changes

There were no significant changes to this activity in FY 2023.

Changes to Metrics

No changes were made to the metrics identified in the FY 2023 Annual Plan.

Challenges in Achieving Benchmarks & Possible Strategies

As noted above, PHA is working with developers on nine additional (9) Public Housing developments consisting of 304 units; however, these developments were still under development as of the end of the fiscal year.

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	334	30	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 2023 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 2023 Projects **</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Amount of funds leveraged in dollars (increase).	\$0	\$148.8 million		
<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 2023. 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. PHA plans to re-evaluate the MENTOR partnership in FY 2024 to determine if it will be renewed.

In FY 2023, PHA continued to provide for extensions to the two-year term for the STAR/RISE programs in order to address the continued economic impact of the COVID-19 pandemic. 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.

Thirteen (13) participants were enrolled in the STAR Program including four (4) new participants who enrolled in the program during the fiscal year. To support housing stability, two (2) participants were granted an extension of their program participation term.

The story of a recent graduate of the STAR program illustrates how the combination of housing and supportive services lays the groundwork for successful re-entry. Upon enrolling in the STAR

program, the graduate took advantage of the housing search support offered through PHA’s Housing Opportunity Program (HOP) to find an apartment in a safe and thriving neighborhood. During his participation in the STAR program, he worked at a home healthcare agency where he received a promotion to a director role. More recently, he has taken a new job with the City of Philadelphia and has enrolled in the HCV homeownership program, where he has begun preparations to become a first-time homeowner.

Approval and Implementation

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

Hardship

Not applicable.

Actual Non-Significant Changes

There were no non-significant changes to this activity in FY 2023.

Actual Significant Changes

There were no significant changes to this activity in FY 2023.

Changes to Metrics

No changes were made to the metrics identified in the FY 2023 Annual Plan.

Challenges in Achieving Benchmarks & Possible Strategies

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>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	10	13	Yes
<i>*Represents the STAR/RISE programs. Mentor program referrals cannot be forecasted.</i>				
<i>SS #3: Increase in Positive Outcomes in Employment Status *</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Employed Full-Time*	10 participants	6	9	Yes
	100% of participants	60%	69%	
Enrolled in a Job Training Program	0 participants	2	0	No

	0% of participants	20%	0%	
Enrolled in an Education Program	0 participants	2	0	No
	0% of participants	20%	0%	

**Represents participants in the STAR/RISE programs only. All participants in the STAR/RISE 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 #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	13	Yes

SS #8: Households Transitioned to Self Sufficiency *

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

**For this program purpose, PHA defines "self-sufficiency" as successfully completing the program and transitioning to other affordable housing. Represents STAR/RISE 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 2023, 46 families were able to purchase a home through the ODAHP program, including:

- 14 families who purchased a home through the HCV Homeownership program
- 8 families who purchased a home through the Public Housing 5(h) program
- 24 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 2023, PHA expanded affordable homeownership opportunities available to PHA and other low-income families as part of the Choice Neighborhoods Transformation Plan for Sharswood/Blumberg, completing construction of 21 homeownership units in Oxford Green in partnership with Habitat for Humanity.

PHA reviewed and assessed the feasibility of implementing Lease to Purchase flexibility in FY 2023 and will continue to assess this option depending on availability of LIHTC homeownership units.

PHA continued its partnership with Jumpstart Philly, rehabilitating vacant and distressed scattered site units. In support of equitable development efforts, PHA and Jumpstart Philly select local aspiring developers to participate in the partnership program, where they receive training, mentoring and financial resources to renovate the scattered site units. Once renovations are complete, the scattered site units are sold to low-income families. In FY 2023, renovations for the first cohort of 10 scattered site units were completed and the homes were sold to low-income families. PHA also began to convey units to the partnership for a second cohort of 20 scattered site units in FY 2023.

A single mother of two was able to purchase a home in FY 2023, a dream she did not think was possible until she attended PHA's homeownership info session where RPP staff laid out the path to homeownership through the HCV Homeownership program. After completing homeownership counseling, PHA connected her with down payment assistance through Philly SEEDs to make her dreams of homeownership come true. Another ODAHP participant was inspired by her children to become a first-time homeowner. To prepare for homeownership, she completed homeownership counseling and worked to improve her credit. In FY 2023, she bought her first home in the neighborhood where she was born and raised.

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 2023.

Actual Significant Changes

There were no significant changes to this activity in FY 2023.

Changes to Metrics

No changes were made to the baseline or benchmarks listed in the FY 2023 Annual Plan.

Challenges in Achieving Benchmarks & Possible Strategies

Interest rates continued to increase in FY 2023, a significant barrier for low-income families to purchase a home.

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	46	No
<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	46	No
<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>				

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 a neighborhood school established in September 2017 serving youth in grades 9-12, which 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 education.

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. In FY 2019, PHA was designated by HUD as an EnVision Center. The plan to establish a neighborhood school and to improve educational outcomes is an integral component of the comprehensive Choice Neighborhoods Transformation Plan for Blumberg/Sharswood.

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 HCV program, other low-income neighborhood youth are also served.

In FY 2023, PHA continued to work towards its goal to improve educational outcomes as part of the Choice Neighborhoods Transformation Plan. PHA provided \$171,000 in MTW Block Grant funds to support after school, enrichment, and extracurricular programming and provide case management to families to address supportive service needs.

BPSP's graduation rate for the class of 2022 was nearly 97%, an increase from 95% during the prior school year. The graduating class includes 14 students who were accepted and plan to enroll in four-year colleges, seven (7) students planning to enroll at CCP, four (4) students who have

enrolled in industry-focused higher education programs, and one (1) student who has enlisted 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 2023.

Actual Significant Changes

There were no significant changes to this activity in FY 2023.

Changes to Metrics

No changes were made to the baseline or benchmarks listed in the FY 2023 Annual Plan.

Challenges in Achieving Benchmarks & Possible Strategies

Enrollment at Vaux Big Picture High School increased during the 2022-2023 school year; however, enrollment levels at BPHS and schools across the city of Philadelphia remained below pre-pandemic levels, creating obstacles for PHA to meet the benchmark of youth served through this activity.

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	400	342	No
<i>* After-school programming and case management services are made available to both PHA residents and youth from the surrounding Sharswood/Blumberg neighborhood, including 130 school-aged PHA residents.</i>				

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 received approval to eliminate the regulatory requirement that FSS participants must have an interim or regular recertification within 120 days prior to enrollment in the FSS program. PHA utilized the last interim or regular recertification prior to enrollment as the basis for FSS escrow calculations. PHA had also redefined the employment obligation for FSS households whose head is elderly or disabled in order to allow any other adult in the household to seek and maintain suitable employment during the term of the contract and any extension thereof. Prior to the approval of this change, suitable employment had to be maintained by the head of household. PHA received approval from HUD and implemented these components of the FSS activity in FY 2020 and FY 2021; however, waivers for these program components are no longer necessary per the FSS Final Rule effective June 16, 2022.

In FY 2023, 65 new families enrolled in FSS, resulting in a total enrollment of 643 families. Two current participants' stories highlight the success of the local FSS program. One participant has started a new better paying job while participating in FSS. Her increased earned income has allowed her to increase her escrow savings, which she, in turn, used to purchase a car so that she could more easily commute to work and pick up her son from school. Another participant enrolled in FSS with little credit history. The participant worked with staff to better understand how to build credit and was able to obtain her first credit card. Since enrolling in FSS, she has significantly increased her credit score, a critical step in her long-term goal of homeownership.

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 2023.

Actual Significant Changes

There were no significant changes to this activity in FY 2023.

Changes to Metrics

No changes were made to the baseline or benchmarks listed in the FY 2023 Annual Plan.

Challenges in Achieving Benchmarks & Possible Strategies

PHA did not meet the benchmark for the employment rate but exceeded benchmarks for average earned income. PHA will continue to engage and connect FSS participants with resources and programming to increase employment and encourage higher earnings in FY 2024.

Metrics:

<i>SS #1: Increase in Household Income*</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase).	HCV: \$21,099 PH: \$27,049	HCV: \$23,499 PH: \$29,449	HCV: \$32,492 PH: \$30,493	Yes

<i>SS #2: Increase in Household Savings*</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average amount of savings/escrow of households affected by this policy	\$0	\$990	\$3,177	Yes

<i>SS #3: Increase in Positive Outcomes in Employment Status*</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Unemployed	108 (72%)	310 (62%)	388 (60%)	No
Employed	42 (28%)	190 (38%)	255 (40%)	No
Enrolled in Education*	0	30 (6%)	N/A	N/A
Enrolled in Job Training*	0	65 (13%)	N/A	N/A

** PHA is in the process of transitioning contractors for the FSS program and is working with the new contractor to obtain certain participant data. PHA will report on the required education and job training metrics in the FY 2024 MTW Report.*

<i>SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)*</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving TANF assistance (decrease)	17 (11.6%)	58 (11.6%)	40 (6%)	Yes

**Metric applies to participants who enroll in FSS after approval of this MTW Activity.*

<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	0	500	643	Yes

**Metric applies to participants who enroll in FSS after approval of this MTW Activity.*

<i>SS #8: Households Transitioned to Self-Sufficiency *</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self-sufficiency (increase).	0	0	44	Yes

ACTIVITY 2020-2: SPONSOR-BASED SHARED HOUSING PILOT

Description/Impact/Update

Under this activity, PHA continued to implement a pilot program to expand housing options for homeless individuals and other hard to serve special populations, which 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 initially involved a shared housing model which included twenty-five (25) units in partnership with the City. PHA subsequently expanded the pilot program with the City to include an additional ten (10) units and entered into a new partnership with the Community College of Philadelphia (CCP) to serve up to sixteen (16) at-risk, low-income students, providing housing opportunities in scattered site units located within walking distance of CCP. Based on an evaluation of the program’s effectiveness in reducing homelessness and providing stable housing for participants, PHA may elect to further expand the program and 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 2023, 35 units were occupied under the pilot program with the City of Philadelphia, serving 60 participants. Under the pilot program with the Community College of Philadelphia, PHA served 13 CCP students, providing housing in six (6) units.

As noted in the FY 2024 MTW Plan, PHA plans to enter a master lease agreement to permit PAPMC to manage the six (6) units under the CCP partnership, sub-leasing these units to eligible CCP students. PHA also plans to enter an agreement with the Drueding Center, a local non-profit with experience supporting families who are homeless or at-risk of homelessness, to provide case management and other services to CCP students residing in the partnership units.

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 2023.

Actual Significant Changes

There were no significant changes to this activity in FY 2023.

Changes to Metrics

No changes were made to the metrics in the FY 2023 Annual Plan.

Challenges in Achieving Benchmarks & Possible Strategies

PHA met all benchmarks set for this activity.

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	41	41	Yes
<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	41	41	Yes

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.

As the local and national states of emergency for the COVID-19 pandemic have expired, PHA did not avail itself of the waivers and alternate requirements made available under this activity in FY 2023. PHA reserves the right to use these flexibilities in the event of future economic or health related emergencies and natural disasters.

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 2023.

Actual Significant Changes

There were no significant changes to this activity in FY 2023.

Changes to Metrics

No changes were made to the metrics in the FY 2023 Annual Plan.

Challenges in Achieving Benchmarks & Possible Strategies

PHA did not meet benchmarks related to Staff Time Savings, as PHA did not use the waiver and alternative requirements for delayed reexaminations under this activity.

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).	22,761 Hours	11,381 hours	16,631 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 COVID-19 pandemic. PHA plans to implement this activity in FY 2024, as outlined in the FY 2024 MTW Plan.

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 programmatic waivers are not

Activity	Plan Year	Close Out Year	Reason for Close Out
			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 2023 is shown below.

Sources		
FDS Line Item	FDS Line Item Name	Actual
70500 (70300+70400)	Total Tenant Revenue	\$29,803,724
70600	HUD PHA Operating Grants*	\$437,823,267
70610	Capital Grants	\$34,882,486
70700 (70710+70720+70730+70740+70750)	Total Fee Revenue	\$0
71100+72000	Interest Income	\$4,543,901
71600	Gain or Loss on Sale of Capital Assets	\$6,086,788
71200+71300+71310+71400+71500	Other Income	\$2,531,701
70000	Total Revenue	\$515,671,867

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	\$79,018,606
91300+91310+92000	Management Fee Expense	\$0
91810	Allocated Overhead	\$ 0
92500(92100+92200+92300+92400)	Total Tenant Services	\$3,199,778
93000 (93100+93600+93200+93300+93400+93800)	Total Utilities	\$25,682,560
93500+93700	Labor	\$0
94000 (94100+94200+94300+94500)	Total Ordinary Maintenance	\$77,017,684
95000 (95100+95200+95300+95500)	Total Protective Services	\$7,751,482
96100 (96110+96120+96130+96140)	Total Insurance Premiums	\$12,176,435

Uses		
FDS Line Item	FDS Line Item Name	Actual
96000 (96200+96210+96300+96400+96500+96600+96800)	Total Other General Expenses	\$23,879,976
96700 (96710+96720+96730)	Total Interest Expense and Amortization Cost	\$572,026
97100+97200	Total Extraordinary Maintenance	\$2,973,408
97300+97350	HAP + HAP Portability-In	\$164,036,473
97400	Depreciation Expense	\$26,819,639
97500+97600+97700+97800 *	All Other Expense - Capital & Development	\$38,651,699
90000	Total Expenses	\$461,779,766
Sources greater than / (less than) Uses		\$53,892,101

PHA plans to utilize existing reserves to fund 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:

In FY 2023, the majority of PHA’s funding came from HUD in the form of Housing Choice Voucher, Public Housing Operating Subsidy, and Capital Fund grants totaling \$437.8 million. PHA also received \$29.8 million in tenant revenues.

Uses of Funds:

- PHA continued to increase affordable housing opportunities for low-income families, providing approximately \$164.0 million in housing assistance payments (HAP) for the tenant based and project-based programs under the HCV program. PHA also provided \$18.2 million for operating costs associated with mixed finance communities.
- PHA expended \$79.0 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 Table 21 below for a summary of resident services initiatives in FY 2023 including MTW and Non-MTW funded initiatives.
- Maintenance Expenses for PHA’s developments and scattered sites totaled \$77.0 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 \$7.8 million in Protective Services to promote continued quality of life for

residents. This expense includes labor, materials, and employee benefits.

Also during this period, PHA undertook other noteworthy activities including:

- Rehabilitation of more than 25 scattered sites units through in-house modernization totaling approximately \$8.6 million.
- Undertook development projects highlighted earlier in the report including Blumberg 4A, Blumberg Phase 6A, Beyond Foster Care on Ridge Avenue, Sharswood PHA Homeownership, Hunt Sharswood Phase II, Harrison Senior Tower, Fairhill Phase II, and others. To date, PHA has invested more than \$23.0 million on these projects.
- Added new ACC and RAD transactions which involve HUD funding, Low Income Housing Tax Credits and/or mortgages (RAD). PHA expended approximately \$20.5 million on these activities.

Table 21: Resident Services Program Summary for FY 2023

Program/Partner	Program Description	Target Population	Funding Source	Residents Served
Adult Education, Training & Employment				
PHA Workforce Center	Drop-in center: Employment “one-stop” providing connections to jobs and training opportunities	PHA residents and Sharswood families	MTW	100 visits and/or contacts per month
PHA Workforce Center Job Training Enrollments	Occupational skills training (CDL, CNA, IT, etc.) in career areas with reasonable growth potential and connection to employment	PHA residents 18-55	MTW	106
Temple-Lenfest North Philadelphia Workforce Initiative – Training Programs	CVS Customer Service & Pharm Tech Training Programs Phlebotomy Tech training	PHA residents + community residents	Temple University via Lenfest Foundation sub-grant	23
PHA’s Intro to Construction Skilled Training Program – Trades for a Difference	Training program introducing young adults to the trades. Trainees use PHA worksites to practice skills.	PHA residents 18-25	MTW	14
Section 3 Job Bank	Ensure that economic opportunities are provided to PHA residents through workshops, info sessions and job matches	PHA residents 18-55	Section 3 vendors	271 active Job Bank participants
Section 3 Resource Center	Ensure that economic opportunities are provided to	PHA residents 18-55	MTW, Section 3 vendors	100+ resident participants in

Program/Partner	Program Description	Target Population	Funding Source	Residents Served
	PHA residents through workshops, info sessions and job matches			workshops and screening
Section 3 Entrepreneurship Fellowships	Six-month fellowship designed to provide a deeper dive into residents journey to self-sufficiency. Fellows are given hands-on support and start-up funds.	PHA residents 18-55	MTW	35
PHA Community Health Worker (CHW) Program	Temple University-trained CHWs providing health navigation and information, access to resources and wellness support	All PHA residents	MTW	10 CHWs serving over 1,500 residents
Financial Management				
Financial Literacy (Homeownership Track)	Course on credit and money management to enable residents to purchase homes	PHA residents 18-55	MTW	750+
FSS (Compass/Clarifi)	Assessment of individual and financial needs, enrollment in FSS, followed by referrals and tracking	PHA residents 18-55	HUD grant	643 current participants and 65 graduates
Homeownership Program	Housing counseling and assistance with home purchase process; this includes 5H, HCV and Mobility Homeownership.	PHA residents 18-55	MTW, Other	43 residents became new homeowners in FY 2023 Over 1,000 residents attended homeownership workshops Over 500 residents actively participating in PHA homeownership activities
Place-Based HUD Initiatives				
CNI Sharswood: People Pillar	Located within the Vaux Community Building, CNI Sharswood People Pillar staff provide place-based case management and service coordination for individuals and families living in and/or moving to the Sharswood neighborhood.	Ongoing comprehensive case management for Sharswood PHA residents returning to Blumberg replacement units and other Sharswood households moving into units built as part of the CNI Housing Strategy.	HUD grant	Outreach and assessments will be completed for approximately 500 households by 2026

Program/Partner	Program Description	Target Population	Funding Source	Residents Served
		Service coordination for non-PHA Sharswood households and residents from relocated households who decide not to return to Blumberg replacement units.		
CNI Norris: Endowment Phase	Place-based case management for families relocated from or living in the Norris North Central development	Entire family	HUD grant	200 assessments completed
Jobs Plus Program	Place-based employment program designed to increase the earnings and employment of working-age residents	PHA residents 18-64 at Wilson Park Apartments	HUD grant	213 participants
ROSS	Assessment of individual and family needs, followed by referrals and tracking	All PHA residents at targeted conventional sites, focus on 18-55	HUD grant	521 needs assessments completed across 9 developments
Youth & Family Programs				
PHA Youth & Family Center	One-stop drop-in center for expecting parents and PHA families raising young people 0-18+, including grandparents raising grandchildren	Youth ages 0-18 and parents or caregivers	MTW, William Penn Foundation grant	Center opened its doors in a soft launch in FY 2023 with an official grand opening planned for FY 2024
Diversionsary Program	Programming designed to address violence in communities and partner with organizations equipped to address trauma.	Entire family	MTW	Over 35 cases logged
Afterschool Programs	On-site programs which meet the standard of providing: (1) homework assistance, (2) project-based learning, (3) community service, and (4) physical/body kinesthetic activities	Youth ages 6-18	MTW, HUD CNI Grant	150+ PHA youth
PHA Summer Camps	Summer enrichment activities to prevent academic regression	Youth ages 6-13	MTW	100 PHA youth
Big Picture Philadelphia	Project-based public high school in the CNI Sharswood footprint	Students in grades 9-12	MTW	342 students enrolled
Mighty Writers Out-of-School Programs	Provides literacy programming and activities.	Youth ages 3-18	Partnership, William Penn	96 PHA residents + over 100 non-PHA community

Program/Partner	Program Description	Target Population	Funding Source	Residents Served
			Foundation, HUD CNI Grant	residents enrolled; weekly food and diaper distribution serves between 80-200 families
Youth Summer Jobs Program (“Summer WorkReady”)	Six weeks of summer employment for youth placed at PHA sites	Teens	Philadelphia Youth Network WorkReady, non-profit partners	25 students placed at PHA, over 50 youth served
ParentChild+ Program	School readiness program provided to support families’ successful enrollment in high quality Pre-K.	Low-income Sharswood families with children between the ages of 16 months to 4 years of age; however, enrollment prioritizes Sharswood PHA residents.	HUD CNI grant	15 families enrolled with at least 80% projected to complete the full 2 year program (August 2021 – July 2023)
Meal Programs				
Summer Food Programs	Breakfast and lunch served on-site to provide appropriate nutrition to youth and young adults during the summer	Youth ages 5-18	MTW, Pennsylvania Department of Education	40,000 meals served
Senior Meals Programs	Meal programs, which not only enable residents to have appropriate nutrition, but also best practice fellowship to support aging in place	PHA residents 62+	HUD grant	16,000 meals served at Bentley Hall 18,000 meals served at senior sites through Philadelphia Corporation of Aging (PCA)

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 2023.

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 received a draft report from HUD shortly before the end of FY 2023 and is finalizing a response to HUD.	Open
HUD Office of Public and Indian Housing, Office of Housing Voucher Programs EHV Vendor Support Team (EVST)	HUD’s Office of Housing Voucher Programs EHV Vendor Support Team (EVST) selected PHA to participate in a review of its Emergency Housing Voucher (EHV) program. The review, which will be completed remotely, commenced on February 27, 2023 and will include EHV activity beginning on July 1, 2021 through January 31, 2023. PHA is working to provide timely responses to requests for documentation from HUD for this review.	Open

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 2023, 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 Language Access Policy (LAP) on the PHA website at this link: http://www.pha.phila.gov/media/164231/lep_policy_4_1_13.pdf. PHA plans to update the LAP in FY 2024.

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 LAP.

Below is information on third-party telephone and in-person translation services utilized in FY 2023. Please note that oral translation services provided by PHA bilingual staff are not included in the numbers below.

Telephone Translation Services Provided in FY 2023

Language	Number of Calls	Minutes
Spanish	716	2,604
Russian	20	180
Haitian Creole	2	25
French	2	23
Italian	2	11
Urdu	1	2
Portuguese	1	3
Polish	1	11
Punjabi	1	5
Total	746	5,864

In Person Translation Services Provided in FY 2023

Language	Requested	Serviced	Canceled
Spanish	15	13	2
Total	15	13	2

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 approximately 3,700 scattered site units, 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 on 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. 12291

RESOLUTION APPROVING THE PHILADELPHIA HOUSING AUTHORITY'S ANNUAL MOVING TO WORK REPORT FOR FISCAL YEAR 2023 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, 2023 and its Annual Report is due to HUD on or before June 30, 2023; and

WHEREAS, PHA has prepared its Annual MTW Report for Fiscal Year 2023, 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 2023 (period ending March 31, 2023), 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 6/15/23
Alan M. Kadin
ATTORNEY FOR PHA