

2013 Moving-To-Work Annual Report

Portage Metropolitan Housing Authority

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Section I: Introduction-Short-Term and Long-Term MTW Goals

Portage Metropolitan Housing Authority established the following goals and objectives for 2013:

1. Maintain and Expand Excellence in Property Management
 - PMHA will operate Public Housing to the level of a High Performer.
 - PMHA will expand the number of units within its portfolio of housing.
2. Achieve and Maintain Excellence in Tenant-Based Housing Programs
 - PMHA will continue to achieve program results equating to High Performer status.
 - Tenant-based housing programs will achieve and maintain full lease-up.
 - Five households will become new homeowners through the Housing Choice Voucher Homeownership Program in 2013
3. Improve Productivity and Cost Effectiveness
 - Expand system of electronic benefits payments beyond test phase for program participants.
 - The Yardi software will be upgraded and staff provided training in the applicable features of the program for managing PMHA programs and operations.
4. Collaborate with Community Partners to Leverage Resources to Benefit Households Assisted by PMHA and Portage County
 - PMHA will investigate opportunities to develop and manage permanent supportive housing.
 - PMHA will investigate methods of inter-agency cooperation that will lessen barriers to assistance for applicants and participants.

PMHA's long-term vision for the direction of its MTW program, extending through the duration of the MTW Agreement includes:

Portage Metropolitan Housing Authority seeks to develop itself as a top-quality real estate organization with the mission of integrating community services that will assist non-disabled, non-elderly residents in continual economic improvement leading to either homeownership or private market housing; and for elderly and disabled residents, PMHA seeks to provide decent, safe and affordable housing as a matter of choice for each household.

To accomplish the long-term vision, PMHA seeks to continual improvement in streamlining the delivery of housing to low-income families and individuals through improvements in efficiency and effectiveness within its own resources offered by the Federal Government, by developing new, non-governmental sources of funding that will assist in achieving the vision and mission of the housing authority, and through cooperation and collaboration with community partners to leverage resources and strengths to better housing and living conditions for all persons living with Portage County, Ohio.

In this effort, Moving to Work is expected to remain a critical element of achieving these goals. PMHA is committed to developing a rent calculation system that is easier to administer and understand without compromising the agency's commitment to the integrity of federal funds. In addition, PMHA envisions a rent system that remains affordable to low-income households, but

also provides incentive and encouragement to people working to the best of their abilities to improve themselves.

Also, the Moving to Work vision includes removing barriers to rational property management decisions, allowing the agency to administer its real estate inventory with solutions appropriate to the mission. What works in Windham or Ravenna, Ohio may not be the same solution for Cleveland, Ohio or Washington, DC. Local, informed decision-making has brought PMHA to the high performer status it has earned under HUD evaluation to this day; PMHA seeks to provide one example of “how to” that might serve as an example for other housing authorities in finding solutions. PMHA does not seek to provide THE example because the agency is committed to the value that local decision-making will free the creativity of housing authority boards and staffs throughout the nation.

Section II: General Housing Authority Operating Information

Pre-formatted Table Included Below:

Annual MTW Report

II.4.Report.HousingStock

A. MTW Report: Housing Stock Information

New Housing Choice Vouchers that were Project-Based During the Fiscal Year

Property Name	Anticipated Number of New Vouchers to be Project-Based *	Actual Number of New Vouchers that were Project-Based	A total of 44 new Project-Based Vouchers were added during 2013
Streetsboro Family Home	28	28	Newly constructed tax-credit townhouses with supportive services
Coleman	7	7	Group Homes with mental health services to residents
Family&Comm.Services	9	9	Supportives services aimed at selfsufficiency for families
Property Name	X	X	Description of project 4

Anticipated Total Number of New Vouchers to be Project-Based *	Actual Total Number of New Vouchers that were Project-Based	Anticipated Total Number of Project-Based Vouchers Committed at the End of the Fiscal Year *	Anticipated Total Number of Project-Based Vouchers Leased Up or Issued to a Potential Tenant at the End of the Fiscal Year *
44	44	157	157
		Actual Total Number of Project-Based Vouchers Committed at the End of the Fiscal Year	Actual Total Number of Project-Based Vouchers Leased Up or Issued to a Potential Tenant at the End of the Fiscal Year
		157	111

* From the Plan

Other Changes to the Housing Stock that Occurred During the Fiscal Year

AMP 1: Highland Ave. Single Family unit was off-line since July 2013 for substantial rehabilitation. Walnut House Unit B-10 and Renaissance Place Unit 0101 are designated as Non-Dwelling-Special Use.

AMP 1: Washington Group Home. All 8 units are designated as Non-Dwelling-Special Use. This building is currently rented by Family and Community Services in partnership to provide on-site services to males with previous addiction issues transitioning back into the community.

AMP 2: Willow Street. Two Unit Duplex is in process of being purchased by Kent State University.

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

General Description of Actual Capital Fund Expenditures During the Plan Year

AMP 1: Highland Ave.-Single Family- abated for asbestos & LBP. Total interior & exterior rehab. \$147,335. Community Estates- floor replacements for 29 units. \$87,227. AMP 2: Athena Gardens-floor replacements for 25 units. \$79,319.

Overview of Other Housing Owned and/or Managed by the PHA at Fiscal Year End

Housing Program *	Total Units	Overview of the Program
Portage Landings	24	Market Renters and Section 8 Voucher holders
616, 614, 614 1/2 Virginia Ave	3	Market Renters and Section 8 Voucher holders
PMHA Admin Building	1	Home for office and maintenance employees
Total Other Housing Owned and/or Managed	28	

* **Select Housing Program from:** Tax-Credit, State Funded, Locally Funded, Market-Rate, Non-MTW HUD Funded, Managing Developments for other non-MTW Public Housing Authorities, or Other.

If Other, please describe:

See attachment Appendix 1: Total Other Housing Owned

II.5.Report.Leasing

B. MTW Report: Leasing Information

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

Non-MTW Housing Choice Voucher Program	0.094798658	
	Planned	Actual
Mainstream 74 planned -67 actual; VASH 25 -18 actual; Enhanced 18 -7 actual	117	92
ModRehab 2 81 planned -62 actual; ModRehab 3 91 -94 actual; ShelterPlus 50 -40 actual	222	196
Port-In Vouchers (not absorbed)	N/A	10
Total Projected and Actual Households Served	339	298

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

** In instances when a Local, Non-Traditional program provides a certain subsidy level but does not specify a number of units/Households Served, the PHA should estimate the number of Households served.

Housing Program:	Unit Months Occupied/Leased****	
	Planned	Actual
Number of Units that were Occupied/Leased through Local Non-Traditional MTW Funded Property-Based Assistance Programs ***	N/A	0
Number of Units that were Occupied/Leased through Local Non-Traditional MTW Funded Tenant-Based Assistance Programs ***	N/A	0
Port-In Vouchers (not absorbed)	N/A	0
Total Projected and Annual Unit Months Occupied/Leased	0	0

Explanation for differences between planned and actual households served

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

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

	Average Number of Households Served Per Month	Total Number of Households Served During the Year
Households Served through Local Non-Traditional Services Only	0	0

Reporting Compliance with Statutory MTW Requirements: 75% of Families Assisted are Very Low-Income

HUD will verify compliance with the statutory objective of “assuring that at least 75 percent of the families assisted by the Agency are very low-income families” is being achieved by examining public housing and Housing Choice Voucher family characteristics as submitted into the PIC or its successor system utilizing current resident data at the end of the agency's fiscal year. The PHA will provide information on local, non-traditional families provided with housing assistance at the end of the PHA fiscal year, not reported in PIC or its successor system, in the following format:

Fiscal Year:	2011	2012	2013	2014	2015	2016	2017	2018
Total Number of Local, Non-Traditional MTW Households Assisted	24	29	38	X	X	X	X	X
Number of Local, Non-Traditional MTW Households with Incomes Below 50% of Area Median Income	24	29	38	X	X	X	X	X
Percentage of Local, Non-Traditional MTW Households with Incomes Below 50% of Area Median Income	100%	100%	100%	X	X	X	X	X

Reporting Compliance with Statutory MTW Requirements: Maintain Comparable Mix

In order to demonstrate that the statutory objective of “maintaining a comparable mix of families (by family size) are served, as would have been provided had the amounts not been used under the demonstration” is being achieved, the PHA will provide information in the following formats:

Baseline for the Mix of Family Sizes Served

Family Size:	Occupied Number of Public Housing units by Household Size when PHA Entered MTW	Utilized Number of Section 8 Vouchers by Household Size when PHA Entered MTW	Non-MTW Adjustments to the Distribution of Household Sizes *	Baseline Number of Household Sizes to be Maintained	Baseline Percentages of Family Sizes to be Maintained
1 Person	X	X	X	X	X
2 Person	X	X	X	X	X
3 Person	X	X	X	X	X
4 Person	X	X	X	X	X
5 Person	X	X	X	X	X
6+ Person	X	X	X	X	X
Totals	297	1311	0	1608	100%

Explanation for Baseline Adjustments to the Distribution of Household Sizes Utilized

Beginning, March 1999 and since, the Portage Metropolitan Housing Authority did not determine number of Households occupied by Household Size. Thus, this information is lacking from 1999 through 2012. However, PMHA will determine such information beginning with 2013 occupancy.

Mix of Family Sizes Served-PH & Sect8							
	1 Person	2 Person	3 Person	4 Person	5 Person	6+ Person	Totals
Baseline Percentages of Household Sizes to be Maintained **	INA	INA	INA	INA	INA	INA	1608
Number of Households Served by Family Size this Fiscal Year 2013	755	471	399	243	88	62	2018
Percentages of Households Served by Household Size this Fiscal Year 2013	37%	23%	20%	12%	4%	3%	1
Percentage Change	INA	INA	INA	INA	INA	INA	0

Justification and Explanation for Family Size Variations of Over 5% from the Baseline Percentages	8 WGH residents have been added to 2013 1-person served category for PH.
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* "Non-MTW adjustments to the distribution of family sizes" are defined as factors that are outside the control of the PHA. Acceptable "non-MTW adjustments" include, but are not limited to, demographic changes in the community's population. If the PHA includes non-MTW adjustments, HUD expects the explanations of the factors to be thorough and to include information substantiating the numbers used.

** The numbers in this row will be the same numbers in the chart above listed under the column "Baseline percentages of family sizes to be maintained."

*** The methodology used to obtain these figures will be the same methodology used to determine the "Occupied number of Public Housing units by family size when PHA entered MTW" and "Utilized number of Section 8 Vouchers by family size when PHA entered MTW" in the table immediately above.

**** The "Percentages of families served by family size this fiscal year" will reflect adjustments to the mix of families served that are directly due to decisions the PHA has made. HUD expects that in the course of the demonstration, PHAs will make decisions that may alter the number of families served.

Description of any Issues Related to Leasing of Public Housing, Housing Choice Vouchers or Local, Non-Traditional Units and Solutions at Fiscal Year End

Housing Program	Description of Leasing Issues and Solutions
Public Housing	No leasing issues
Section 8 Voucher	No leasing issues
Local Non-Traditional Voucher	No leasing issues

Number of Households Transitioned To Self-Sufficiency by Fiscal Year End

Activity Name/#	Number of Households Transitioned *	Agency Definition of Self Sufficiency
PH Households w/ Wages	116	Households With Wage Income
Section8 Households w/Wages	464	Households With Wage Income
Section8 Family Self-Sufficiency Program	22	Section 8 FSS Participation
Homeownership Program	27	Homeownership Program Participation
Households Duplicated Across Activities/Definitions	36	593
ANNUAL TOTAL NUMBER OF HOUSEHOLDS TRANSITIONED TO SELF SUFFICIENCY	593	

II.6.Report.Leasing

C. MTW Report: Wait List Information

Wait List Information at Fiscal Year End				
Housing Program(s) *	Wait List Type **	Number of Households on Wait List	Wait List Open, Partially Open or Closed ***	Was the Wait List Opened During the Fiscal Year
Federal MTW Public Housing Units	Community-Wide	2,078	Open	Yes
Federal MTW Housing Choice Voucher Program	Community-Wide	2,622	Open	Yes
Local Non-MTW Voucher Programs	Community-Wide	0	Open	Yes

More can be added if needed.

* *Select Housing Program* : Federal MTW Public Housing Units; Federal MTW Housing Choice Voucher Program; Federal non-MTW Housing Choice Voucher Units; Tenant-Based Local, Non-Traditional MTW Housing Assistance Program; Project-Based Local, Non-Traditional MTW Housing Assistance Program; and Combined Tenant-Based and Project-Based Local, Non-Traditional MTW Housing Assistance Program.

** *Select Wait List Types*: Community-Wide, Site-Based, Merged (Combined Public Housing or Voucher Wait List), Program Specific (Limited by HUD or Local PHA Rules to Certain Categories of Households which are Described in the Rules for Program Participation), None (If the Program is a New Wait List, Not an Existing Wait List), or Other (Please Provide a Brief Description of this Wait List Type).

*** For Partially Open Wait Lists, provide a description of the populations for which the waiting list is open.

PH: AmInd=0.2%; Asian=0.0%; Black=33.4%; Nat.HI=0.1%; White=60.3%; Multiple=1.8%; Unknown=4%

Section8: AmInd=0.3%; Asian=0.2%; Black=33.6%; NatHI=0.1%; White=61.5%; Multiple=1.4%; Unknown=3%

PMHA has no other wait lists.

If Local, Non-Traditional Program, please describe:

N/A

N/A

N/A

If Other Wait List Type, please describe:

Name and Description of "other" wait list type

Name and Description of "other" wait list type

Name and Description of "other" wait list type

If there are any changes to the organizational structure of the wait list or policy changes regarding the wait list, provide a narrative detailing these changes.

There were no changes to the wait list during 2013.

Section III: Proposed MTW Activities

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

Section IV: Approved MTW Activities: HUD approval previously granted

A. Implemented Activities

Housing Choice Voucher Program

HCV-1 Restrict portability moves out of Portage County for the Housing Choice Voucher Program:

PMHA will approve portability only to housing authorities who absorb the incoming family, or administer Fair Market Rents at or below the amounts applicable to Portage County. Plan Year: 2009 Implementation: 2010.

<i>CE #4 Increase in Resources Leveraged</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Amount of funds leveraged in dollars (increase)	Amount leveraged prior to implementation of the activity (in dollars) This number may be zero	Expected amount leveraged after implementation of the activity (in dollars)	Actual amount leveraged after implementation of the activity (in dollars)	Outcome meets or exceeds the benchmark
	\$0.0	\$150 per household	Households initially denied portability due to higher fair market rents and unwillingness to absorb: 2010-2 HH= \$334 2011-15 HH= \$2,505 2012-22 HH= \$3,674 2013-17 HH= \$2,831	Benchmark met

Authorization(s):

Attachment C, Heading D. (1g) of the Standard Agreement- This authorization waives certain sections of 24 CFR 982.355(c) (4).

This authorization was necessary and useful in preventing portability to higher cost jurisdictions and permit improved cost control.

HCV-2 Amend the Homeownership Voucher Program to include households who are presently homeowners and under foreclosure.

MTW Homeownership Program: PMHA will continue to expand the MTW homeownership program, which identifies families with homeownership as one of their goals, screens the family for eligibility and applies a homeownership assistance payment to participants who purchase a home under the program. Plan Year: 1999. Implementation: 2000

HC #6: Increase in Homeownership Opportunities				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households that purchased a home as a result of the activity (increase)	Number of households that purchased a home prior to implementation of the activity. This number may be zero.	Expected number of households that purchased a home after implementation of the activity (number)	Actual number of households that purchased a home after implementation of the activity (number)	Outcome meets or exceeds the benchmark
	0	2 per year	49 households purchased homes between 2001-2013	Benchmark met

Authorization(s)

Attachment C, Part D, Section 8 This authorization waives certain provisions of Section 8(o)(15) and 8(y) of the 1937 Act and 24 C.F.R. 982.625 through 982.643 inclusive as necessary to implement the Agency’s Annual MTW Plan. In reviewing the program and current homeownership requirements established by HUD, the new homeownership program probably does not need MTW authorization to operate. The slight provisions under MTW could be met through creative use of preferences to maintain the program for Public Housing residents who wish to become homeowners.

HCV-3 Initial rent burden cap of 50% of adjusted monthly income

1. Description:

Initial Rent Burden Cap of 50% of adjusted monthly income. PMHA will allow HCV participants to utilize an initial rent burden of 50% to maximize housing choice will maintaining a level of affordability. Plan Year: 1999. Implemented: 2000

2. Tracking and documenting the implementation of the activity:

PMHA undertakes a 100% quality control of all move-in files. This ensures this activity is being implemented.

3. Identifying the intended and possible unintended impacts:

This activity ensures that households are paying an affordable rent amount. There are no unintended impacts.

4. Measuring the impact of the rent reform activity:

Household files are reviewed to ensure that rental amounts are affordable based on income. This activity increases housing choices for low-income households.

5. Description of Annual Reevaluation of the activity:

Metrics are reviewed annually to review the impact on housing choices. To date, this activity achieves its initial intention.

There were no hardship requests since the implementation of this activity.

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)	Households able to move to a better unit and/or neighborhood of opportunity prior to implementation of the activity (number). This number may be zero.	Expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity (number)	Actual increase in households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity (number)	Outcome meets or exceed the benchmark
	0	10 households or 10% of all households (whichever is greater)	2009- 86 (28%) of 304 households 2010- 9 (12%) of 75 households 2011- 30 (16%) of 182 2012- 46 (24%) of 193 households 2013- 16 (20%) of 82 households	Benchmark met

Authorization(s)

Rent Policies and Term Limits Attachment C, Part D, Section 2.a This authorization waives certain provisions of Sections 8(o)(1), 8(o)(2), 8(o)(3), 8(o)(10) and 8(o)(13)(H)-(I) of the 1937 Act and 24 C.F.R. 982.508, 982.503 and 982.518, as necessary to Implement the Agency's Annual MTW Plan.

Moving to Work authorization allows for this activity to occur, by providing an additional 10% of income for residents to choose to use towards housing costs, above the established 40% allowed nationally.

HCV-4 Project-Based Voucher Program to assist non-profits and developers to increase housing choices for low-income households

PMHA uses a number of waivers from the original and current HCV guidelines to assist developers to build or rehabilitate properties for the use of homeless, disabled or other families in need of supportive services. Plan Year: 1999 Implemented: 2002 and with revision in 2009

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 (homeless, disabled or others in need of social services) at or below 80% AMI as a result of the activity (increase).	Housing units of this type prior to implementation of the activity (number). This number may be zero.	Expected housing units of this type after implementation of the activity (number)	Actual housing units of this type after implementation of the activity (number)	Outcome meets or exceeds the benchmark
	0	50	2002-10 2003-31 2004-93 2005-121 2006-112 2007-114 2008-106 2009-102 2010-96 2011- 94 2012- 154 2013-157	

Authorization(s)

Attachment C, Part D, Section 7 This authorization waives certain provisions of Section 8(o)(15) and 8(y) of the 1937 Act and 24 C.F.R. 982.625 through 982.643 inclusive as necessary to implement the Agency’s Annual MTW Plan.

The original Project-Based Voucher for Moving to Work pre-dated the current PBV program, and thus was a waiver of initial Housing Choice Voucher (then Section 8 Voucher and Certificate) rules. It was also an attempt to take what was proposed for Project-Based Vouchers at the time, and to pre-empt objectionable portions of the proposed legislation and regulations and design a locally-desirable program. Today, the authorizations and waivers have allowed a locally-designed program to remain responsive to potential new projects by local housing developers and foster more purchase and rehab of existing real estate by those entities.

PUBLIC HOUSING

PH-1 Escalating Minimum Rent

Refer to D. Closed Out Activities

PH-2 Maximum Rent

1. Description:

Maximum Rent allows for rents set at less than 30% of adjusted income. Maximum rents are \$465 per month for 1 and 2 bedroom units, and \$490 per month for 3 and 4 bedroom units, regardless of income. Income re-verifications are biennially for these households. Households will have no time limit for ceiling rents.

Plan Year: 2008 Implemented: 2008

2. Tracking and documenting the implementation of the rent reform activity:

Rent calculations sheets for all households are reviewed quarterly. Maximum Rent households are identified and tracked for evaluation.

3. Identifying the intended and possible unintended impacts (including changes to the amount of rent residents pay) of the rent reform activity:

Originally, households were permitted to reside in public housing for as many as 5 years at maximum rent amounts before having their maximum rent increase to 90% of the HUD Fair Market Rents. As the 5-year time limitation approached in 2013 for the first residents participating in this activity, the PMHA decided to suspend time limitations. This was because families paying maximum rent demonstrated greater willingness to remain in Public Housing and to provide stability to PMHA rental communities than under previous ceiling rents and the pure "income-based" rents.

4. Measuring the impacts of the rent reform activity:

The Quarterly Report identifies the number of households at Maximum Rent and their Total Tenant Payments for comparative analysis. This information is documented to assess loss of rent revenue. Additionally, PMHA measures the length of residency between Maximum Rent households and those households not at Maximum Rent. Since the turn-over rate is lower for Maximum Rent households, the PMHA reaps lower maintenance and vacancy costs as well as greater stability among its rental communities.

5. Annual Reevaluation of the Activity:

PMHA evaluates rental amounts of Maximum Rent households to review affordability of this activity. However, the PMHA does not anticipate changing the policy or philosophy behind the activity.

There were no hardship requests since the implementation of this activity.

MAXIMUM RENT

SS#5: Households Assisted by Services that Increase Self-Sufficiency

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of Households at Maximum Rent	Number of Households at Maximum Rent prior to implementation	Expected Number of HH to achieve maximum rent	Actual Number of HH at Maximum Rent	Outcome Meets or Exceeds Benchmark
	Maximum rent amounts were established as a MTW activity. Thus, no prior participation	35	2010- 43 2011- 44 2012- 43 2013- 42	Benchmark exceeded for 2013
SS #3: Increase in Positive Outcomes in Employment Status and Maintenance of Income Level				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Maintained Maximum Rent Status	Maximum Rent Households Prior to Activity Implementation	Expected number of Households to maintain income level for maximum rent	Actual number of Households that maintained income level for maximum rent	Outcome meets or exceeds benchmark
	Zero	35	2010- 37 2011- 31 2012- 39 2013- 38	Benchmark exceeded for 2013
	Percentage of Total Households at Maximum Rent prior to implementation	Expected Percentage of Total Households at Maximum Rent	Actual Percentage of Households at Maximum Rent	Outcome meets or exceeds benchmark
	0%	12%	13.3%	Benchmark exceeded for 2013
CE #5: Increase in Agency Rent Revenue				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Rental revenue	Rental revenue prior to implementation	Expected rental revenue (month)	Actual rental revenue (month)	Outcome meets or exceeds benchmark
	Not applicable or \$0	\$15,000	\$17,140	Benchmark exceeded for 2013
CE #2 Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease)	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours)	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours)	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours)	Outcome meets or exceeds benchmark
	3 hours per	3 hours per	2010-43= 129 hours	Benchmark met

	household at maximum rent or 105 hours for 35 HH	household or 105 hours per 35 households participating in activity	2011-44= 132 hours 2012-43= 129 hours 2013-42= 126 hours	
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Cite the specific provision(s) of the Act or regulation that is waived under MTW that authorized the Agency to make the change, and briefly describe if and how the waived section of the Act or regulation was necessary to achieve the MTW activity.

Rent Policies and Term Limits-Section 3(a)(2), 3(a)(3)(A) and Section 6(1) of the 1937 Act and 24 CFR 5.603, 5.611, 5.628, 5.630, 5.632, 5.632 and 960.255 and 966 Subpart A as necessary to implement the Agency’s Annual MTW Plan.

Initial, Annual and Interim Income Review Process

Sections 3 (a) (1) and 3 (a) (2) of the 1937Act and 24 CFR 966.4 and 960.257

PH-3 Elderly and Disabled Rent Re-certifications Biennially

1. Description:

Elderly and disabled households who have 90% or more of their income from Social Security, SSI or other disability payments, and pensions will have a rent redetermination every two years. However, they may choose to have their income reexamined at any time. Plan Year: 1999 Implemented: 1999

2. Tracking and documenting the implementation of the rent reform activity:

Tracking is done annually by the Public Housing staff by assessing the number of households opting for biennially re-certifications. Rent calculations are also reviewed for these households on a quarterly basis.

3. Identifying the intended and possible unintended impacts

Since these households receive such a slight annual increase (if any) for these types of income sources, the amount of time and costs to conduct annual re-certifications exceeds the amount of increased rent revenue gained. The intended impacts are met. There are no unintended impacts identified since the implementation of this activity.

4. Measuring the impacts of the activity

This is done at annually for the completion of the Annual MTW Report. Data is compiled and reviewed from Public Housing records identifying households requesting to opt out of recertification and identifying those households that must undergo an annual re-certification.

5. Description of Annual Reevaluation of the Activity

The number of participating eligible households is reviewed by the Public Housing staff to determine if this activity continues to be of value to residents and the PMHA. Any recommended deviation from this process would be forwarded to the Director for final action.

CE#2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcomes	Benchmark Achieved?
Total time to complete the task in staff hours (decrease)	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours)	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours)	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours)	Outcome meets or exceeds the benchmark
	3 hours x 90 residents or 270 hours	3 hours x 20 residents or 60 hours	2010-20 residents Savings Time=60 hrs. 2011-25 residents Savings Time=75 hrs. 2012-34 residents Savings Time=102 hrs. 2013-45 residents Savings Time=135 hrs.	Benchmark exceeded for 2013
CE #1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease)	Cost of task prior to implementation of the activity (in dollars)	Expected cost of task after implementation of the activity (in dollars)	Actual cost of task after implementation of the activity (in dollars)	Outcome meets or exceeds the benchmark
	3 hours x 90 residents x \$13 or current hourly salary of staff person= \$3,510	3 hours x 20 residents x \$13 or current hourly salary of staff person= \$780	2010= \$780 2011= \$1,011 2012= \$1,326 2013= \$1816	Benchmark exceeded

There were no hardship requests since the implementation of this activity.

Cite the specific provision(s) of the Act or regulation that is waived under MTW that authorized the Agency to make the change, and briefly describe if and how the waived section of the Act or regulation was necessary to achieve the MTW activity.

Initial, Annual and Interim Income Review Process
Sections 3 (a)(1) and 3 (a)(2) of the 1937 Act and 24 CFR 966.4 and 960.257

PH-4 Change in Employment Income

1. Description:

Change in employment income resulting in an increase in annual income of any amount or a decrease in employment income of \$1,000 or less is not processed until the next annual re-certification. However, residents are expected to report changes.

Plan Year: 2008 Implemented: January 2012

2. Tracking and documenting the implementation:

Increases in annual income of any amounts are tracked through a review of rent calculation reports for each household on a quarterly basis. Decrease in employment income of \$1,000 or less is tracked by Public Housing staff.

3. Identifying the intended and possible unintended impacts

The amount of excluded income is reviewed by the Director quarterly to ensure that the loss of rent income outweighs the cost of performing interim rent re-certifications. The intension of the activity has been met. There are no unintended impacts to date.

4. Measuring the impacts of the rent reform activity

Actual savings in staff time are reviewed annually to ensure that this activity continues to be cost effective.

5. Description of Annual Reevaluation of the Activity

The Public Housing Manager and Director review the benchmarks of the activity and determine if there is a need for revision or discontinuation of the activity.

CE #1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease)	Cost of task prior to implementation of the activity (in dollars)	Expected cost of task after implementation of the activity (in dollars)	Actual cost of task after implementation of the activity (in dollars)	Outcome meets or exceeds the benchmark
	Number of residents with income increases or decreases of \$1,000 or less in annual income 20 residents x 3 hours x \$13.45 or current hourly rate= \$807	20 residents x 30 hours x \$13.45 or current hourly rate= \$807	2012= \$975 2013= \$1,291	Benchmark met
CE #2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to	Total amount of	Expected amount of	Actual amount of	Outcome meets or

complete the task in staff hours	staff time dedicated to the task prior to implementation of the activity	total staff time dedicated to the task after implementation of the activity (in hours)	total staff time dedicated to the task after implementation of the activity (in hours)	exceeds the benchmark
	20 residents x 3 hours= 60 hours	20 residents x 3 hours= 60 hours	2012= 75 hours 2013= 96 hours	Benchmark met

There were no hardship requests since the implementation of this activity.

Cite the specific provision(s) of the Act or regulation that is waived under MTW that authorized the Agency to make the change, and briefly describe if and how the waived section of the Act or regulation was necessary to achieve the MTW activity.

Initial, Annual and Interim Income Review Process

Sections 3 (a)(1) and 3 (a)(2) of the 1937 Act and 24 CFR 966.4 and 960.257

The waived section of the 1937 Act and regulations was necessary in that relatively minor and frequent changes in income did create administrative burden when reported. No hardship requests were made in relation to this policy.

PH-5 Rent Adjustment for Income Decreases

1. Description:

Decreases in income resulting in less than \$1,000, and lasting less than 30 days will not be processed until the next annual re-certification.

Plan Year: 2009 Implemented: 2009

2. Tracking and documenting the implementation of the activity:

The tracking of this activity is performed by the Public Housing department staff on a customized form.

3. Identifying the intended and possible unintended impacts of the activity:

This rent reform activity is seldom used. However, whenever a household experiences an income decrease less than \$1,000 the amount to process the decrease is costly to the PMHA and has minimal impact on the household. Thus, the PMHA views this activity as being positive and continues its implementation.

4. Measuring the impacts of the rent reform activity:

The impacts of the activity are measured for cost effectiveness on an annual basis. Information gathered on the tracking sheet is the basis for review. To date, households have not voiced negative feedback.

5. Description of Annual Reevaluation:

The annual reevaluation consists of a review of the data and feedback, if any, voiced by affected households.

CE #1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease)	Cost of task prior to implementation of the activity (in dollars)	Expected cost of task after implementation of the activity (in dollars)	Actual cost of task after implementation of the activity (in dollars)	Outcome meets or exceeds the benchmark
	3 hours x \$13 or current hourly rate per each recertification= \$39	1 residents x 3 hours x \$13 or current hourly rate = \$39	2013= \$0	Zero residents had income decreases lasting longer than 30 days in 2013
CE #2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours	Total amount of staff time dedicated to the task prior to implementation of the activity	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours)	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours)	Outcome meets or exceeds the benchmark
	3 hours per re-certification	3 hours	2013- 0	Zero residents had income decreases lasting longer than 30 days in 2013

There were no hardship requests since the implementation of this activity.

Cite the specific provision(s) of the Act or regulation that is waived under MTW that authorized the Agency to make the change, and briefly describe if and how the waived section of the Act or regulation was necessary to achieve the MTW activity.

Sections 3 (a)(1) and 3 (a)(2) of the 1937Act and 24 CFR 966.4 and 960.257

PH-6 Overall Percentage of Income Amounts for Rent Calculations

1. Description:

This activity was implemented April 1, 2012. In order to reward “work” or employment, residents with wage income receive a deduction from annual gross income of an amount equal to 4% of annual “earned income”. There is no limit on the number of times a household member can receive this benefit or any restrictions on the number of household members that are eligible for this feature. The 4% deduction of annual earned income offsets the previous employment and education deductions of \$500 each and the childcare allowance.

Plan Year: 2012 Implemented: April 1, 2012

2. Tracking and documenting implementation:

Rent calculations for Public Housing households are reviewed on a quarterly basis to document and ensure implementation.

3. Identify intended and possible unintended impacts

This activity provides a reward for earned income while minimizing rent increases. There are no restrictions on the amount a Household can earn and still receive a 4% deduction. There have been no unintended impacts to date.

4. Measuring the impacts of the activity:

Average household incomes are increasing among working families.

5. Description of Annual Reevaluation:

PMHA will evaluate this feature to ensure affordability. Quarterly reports based on rent calculations are reviewed to evaluate household incomes of those who have earned income. To date, households with wage incomes are experiencing gains in annual income levels, which is an indication that impacts are being met.

SS #1: Increase in Household Income				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase)	Average earned income of households affected by this policy prior to implementation of the activity (in dollars)	Expected average earned income of households affected by this policy prior to implementation of the activity (in dollars)	Actual average earned income of households affected by this policy prior to implementation (in dollars)	Outcome meets or exceeds the benchmark
	\$14,000	\$15,000	2012- \$17,588 2013- \$18,373	Benchmark exceeded
SS #3: Increase in Positive Outcomes in Employment Status				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Employed	Heads of Households employed prior to implementation of the activity	Expected heads of households employed after implementation of the activity	Actual heads of households employed after implementation of the activity	Outcome meets or exceeds the benchmark
	113 (Based on average employed)	113	2012- 113 2013- 119	Benchmark met
	Percentage of total work-able households employed prior to implementation of activity	Expected percentage of total work-able households employed after implementation of the activity	Actual percentage of total work-able households employed after implementation of the activity	Outcomes meets or exceeds benchmark
	56%	56%	2012- 60% 2013- 59%	Benchmark met

There were no hardship requests since the implementation of this activity.

Cite the specific provision(s) of the Act or regulation that is waived under MTW that authorized the Agency to make the change, and briefly describe if and how the waived section of the Act or regulation was necessary to achieve the MTW activity.

Rent Policies and Term Limits-

Section 3(a)(2), 3(a)(3)(A) and Section 6(1) of the 1937 Act and 24 CFR 5.603, 5.611, 5.628, 5.630, 5.632, 5.632 and 960.255 and 966 Subpart A as necessary to implement the Agency's Annual MTW Plan.

Initial, Annual and Interim Income Review Process

Sections 3 (a)(1) and 3 (a)(2) of the 1937Act and 24 CFR 966.4 and 960.257

**PH-7 Eliminate Allowance for Non-Reimbursed Childcare Expenses
Comment and Replace with 4% Overall percentage of earned income**

1. Description:

This activity was eliminated and replaced with a 4% overall percentage of earned income amounts for rent calculations. The purpose of this feature is to simplify rent calculations for transparency shared by both residents and PHA staff, as well as reducing administrative burden relating to documentation.

Plan Year: 2012 Implemented: April 1, 2012

2. Tracking and documenting the implementation of the activity:

Quarterly computer reports of rent calculations for households are reviewed.

3. Identifying intended and unintended impacts:

This activity eliminates the need for third-party verifications which has resulted in a savings of time for staff. There have been no unintended impacts.

4. Measuring the impacts of the rent reform activity:

The 4% deduction in place of the childcare expense deduction has demonstrated a cost savings to the PMHA with no voiced detriment to households. The 4% of earned-income deduction rewards work since there is no limit on earnings to receive this deduction.

CE #1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease)	Cost of task prior to implementation of the activity (in dollars)	Expected cost of task after implementation of the activity (in dollars)	Actual cost of task after implementation of the activity (in dollars)	Outcome meets or exceeds the benchmark
	\$2,210 (113 households x 1.5 hours x \$13 or current hourly rate)	\$2,210 (113 households x 1.5 hours x \$13 or current hourly rate)	2012-113 households= \$2,210 2013-119 households= \$2,400	Benchmark met

5. Description of Annual Reevaluation:

Data and impact are reviewed by the Public Housing Department and Director to determine effectiveness and the need for revision.

There were no hardship requests since the implementation of this activity.

Cite the specific provision(s) of the Act or regulation that is waived under MTW that authorized the Agency to make the change, and briefly describe if and how the waived section of the Act or regulation was necessary to achieve the MTW activity.

Rent Policies and Term Limits-

Section 3(a)(2), 3(a)(3)(A) and Section 6(1) of the 1937 Act and 24 CFR 5.603, 5.611, 5.628, 5.630, 5.632, 5.632 and 960.255 and 966 Subpart A as necessary to implement the Agency's Annual MTW Plan.

Initial, Annual and Interim Income Review Process

Sections 3 (a)(1) and 3 (a)(2) of the 1937Act and 24 CFR 966.4 and 960.257

PH-8 Deduction for Elderly or Disabled Adults

Refer to B. Not Yet Implemented Activities Plan Year: 2012

PH-9 Providing Transitional Housing

Refer to D. Closed Out Activities Plan Year: 1999

PH-10 PMHA to Operate a Group Home as Public Housing

PMHA has run into difficulties replacing the original service provider of Washington Group Home who operated the group home for over 25 years. Funding cuts to providers and changes in philosophies for housing has made the group home facility difficult to utilize, and the tastes of subsidized households for other types of housing and availability of other forms of subsidized housing may have made the building outdated. In the local housing market, there are other group home and nursing home facilities that have remained vacant and unsold for years; this does not bode well for Washington Group Home or Portage Horizons.

As a result, PMHA has entered into a partnership with Family and Community Services to lease the building and provide around-the-clock services to men with substance abuse issues on a voluntary basis. These comprehensive services will facilitate a successful transition back to community living. This project was finalized during the first half of 2013.

The status of this building will be the same as the Willow Street 2-unit property in Kent. Residents will not be entered in PIC, but the building will provide housing and supportive services to a specific population. Family and Community Services will screen and select eligible candidates for this program known as ROOT. Thus, Standard HUD Metrics do not apply.

Plan Year: 2009 Implemented: 2009

PH-11 Deduction for Absent Child

Refer to D. Closed out Activities.

BOTH HOUSING VOUCHER and PUBLIC HOUSING PROGRAMS

B-1 Exclusion of overtime, bonuses and income from bank assets

1. Description:

PMHA excluded income from overtime, bonuses and interest income from bank assets such as checking and savings accounts and certificates of deposit. Plan year: 1999
Implemented: 2000

2. Tracking and documenting the implementation of the rent reform activity:

Computerized reports that identify households with excluded income are reviewed quarterly for public housing households and annually for Section 8 participants.

3. Identifying the intended and possible unintended impacts:

The intended impacts demonstrate that household savings increase by the fact that income from these sources is excluded. Also, staff time is saved by not having to seek third-party verifications and performing applicable rent calculations. There are no unintended impacts to date.

4. Measuring the impacts of the activity:

Households with excluded income are tracked and the costs savings to the PMHA are calculated. The amounts of excluded income from these sources generally have minimal impact on rent revenue.

5. Description of Annual Reevaluation of the activity:

The data is reviewed by the Director to ensure the activity is meeting benchmarks and continues to be affordable to the PMHA.

Section 8 Voucher Program

SS #2 Increase in Household Savings				
Unit of Measurement	Baseline	Benchmark	Outcomes	Benchmark Achieved
Average amount of savings of households affected by this policy in dollars (increases) From Income from Bank Assets	Average savings amount of households affected by this policy prior to implementation of the activity From Income from Bank Assets	Expected average savings amount of households affected by this policy after implementation of the activity (in dollars) From Income from Bank Assets	Actual average savings amount of households affected by this policy after implementation of the activity (in dollars) From Income from Bank Assets	Outcome meets or exceeds the benchmark
	\$200	\$200	2013-700 HH= \$401	Benchmark met
CE #1: Agency Cost Savings				
Unit of	Baseline	Benchmark	Outcome	Benchmark

Measurement				Achieved?
Total Cost of task in dollars (decrease) From Income from Bank Assets	Cost of task prior to implementation of the activity (in dollars) From Income from Bank Assets	Expected cost of task after implementation of the activity (in dollars) From Income from Bank Assets	Actual cost of task after implementation of the activity (in dollars) From Income from Bank Assets	Outcome meets or exceeds the benchmark From Wage Exclusions
	500 residents x 3 hours x \$11.24 or current hourly rate=\$16,860	500 residents x 3 hours x \$11.24 or current hourly rate=\$16,860	2009-694 HH= \$23,402 2010-974 HH= \$32,843 2011-1,096 HH= \$41,064 2012-1,070 HH= \$36,080 2013-700 HH= \$23,604	Benchmark exceeded

PUBLIC HOUSING PROGRAM

B-1 Exclusion of overtime, bonuses, wages and income from bank assets

<i>SS #2 Increase in Household Savings</i>				
Unit of Measurement	Baseline	Benchmark	Outcomes	Benchmark Achieved
Average amount of savings of households affected by this policy in dollars (increases) From Wage Exclusions	Average savings amount of households affected by this policy prior to implementation of the activity From Wage Exclusions	Expected average savings amount of households affected by this policy after implementation of the activity (in dollars) From Wage Exclusions	Actual average savings amount of households affected by this policy after implementation of the activity (in dollars) From Wage Exclusions	Outcome meets or exceeds the benchmark
	\$5,000	\$5,000	2012- \$8,728 2013- \$7,645	Benchmark exceeded
Average amount of savings of households affected by this policy in dollars (increases) From Income from Bank Assets	Average savings amount of households affected by this policy prior to implementation of the activity From Income from Bank Assets	Expected average savings amount of households affected by this policy after implementation of the activity (in dollars) From Income from Bank Assets	Actual average savings amount of households affected by this policy after implementation of the activity (in dollars) From Income from Bank Assets	Outcome meets or exceeds the benchmark
	\$500	\$500	2010 Average \$2,650-90 HH 2011 Average- \$2,456-101 HH	Benchmark met <i>*Note: Actual Median Savings</i>

			2012 Average- \$4,463-109 HH 2013-Average- \$4,643-131 HH	<i>amount of households affected by this policy after implementation has been \$100 historically.</i>
CE #1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total Cost of task in dollars (decrease) From Wage Exclusions	Cost of task prior to implementation of the activity (in dollars) From Wage Exclusions	Expected cost of task after implementation of the activity (in dollars) From Wage Exclusions	Actual cost of task after implementation of the activity (in dollars) From Wage Exclusions	Outcome meets or exceeds the benchmark From Wage Exclusions
	20 residents x 3 hours x \$13 or current hourly rate= \$780	20 residents x 3 hours x \$13 or current hourly rate= \$780	2012= 25 residents = \$975 2013= 30 residents = \$1,211	Benchmark exceeded
Total Cost of task in dollars (decrease) From Income from Bank Assets	Cost of task prior to implementation of the activity (in dollars) From Income from Bank Assets	Expected cost of task after implementation of the activity (in dollars) From Income from Bank Assets	Actual cost of task after implementation of the activity (in dollars) From Income from Bank Assets	Outcome meets or exceeds the benchmark From Wage Exclusions
	50 residents x 3 hours x \$13 or current hourly rate= \$1,950	50 residents x 3 hours x \$13 or current hourly rate= \$1,950	2010-95 residents = \$3,705 2011-101 residents = \$3,939 2012-109 residents = \$4,251 2013-131 residents = \$5,286	Benchmark exceeded

There were no hardship requests since the implementation of this activity.

Cite the specific provision(s) of the Act or regulation that is waived under MTW that authorized the Agency to make the change, and briefly describe if and how the waived section of the Act or regulation was necessary to achieve the MTW activity.

Rent Policies and Term Limits-No change

Section 3(a)(2), 3(a)(3)(A) and Section 6(1) of the 1937 Act and 24 CFR 5.603, 5.611, 5.628, 5.630, 5.632, 5.632 and 960.255 and 966 Subpart A as necessary to implement the 2009 PMHA Annual MTW Plan

Use of Public Housing as an Incentive for Economic Progress

Section 6 (c) of the 1937 Act and 24 CFR 960.201

This authorization dates to the original MTW agreement. It is conceivable PMHA could waive such aspects of income without authorization as a permissible, optional income deduction, but has been maintained within the MTW Agreement.

B-2 Cap on dependent child deduction

1. Description:

The Housing Choice Voucher and Public Housing Programs will continue to give a \$480 allowance for each family member (other than the head or spouse), who is disabled or a minor, and for family members who are 18 and older who are full-time students or who are disabled. This allowance is not to exceed \$960, except that current residents (as of April 23, 1999) are entitled to an allowance of \$480 for each family member who is a minor and for family members who were 18 and older and full-time students or who are disabled as of June 1, 2000. Plan Year: 1999 Implemented: 2000

2. Tracking and documenting the implementation:

Rent calculations for Public Housing households and computer generated reports for Section 8 participants are used to track and document implementation.

3. Identify the intended and possible unintended impacts:

The intended impact is an increase in revenues which has been achieved. There have been no unintended impacts to date.

4. Measuring the impacts of the activity:

On an annual basis, data detailing the number of dependents per household is reviewed to determine how many dependents exceed the maximum of two for rent calculations. The excess amounts are calculated to determine savings to the PMHA.

5. Description of Annual Reevaluation of the activity:

On an annual basis a review is undertaken to determine the amount of funds leveraged and potential detrimental effects on households. To date, there is no reason to modify this activity.

Housing Choice Voucher Program

CR #4: Increase in Resources Leveraged				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Amount of funds leveraged in dollars (Increase)	Amount leveraged prior to implementation of the activity (in dollars)	Expected amount leveraged after implementation of the activity (in dollars)	Actual amount leveraged after implementation of the activity (in dollars)	Outcome meets or exceeds the benchmark
	\$0.00	\$3,000	2010-237 households w/3 or more dependents=\$373,440	Benchmark exceeded

			HAP savings= \$3,606 2011=226 households w/3 or more dependents= \$382,560 HAP savings= \$3,974 2012-217 households w/3 or more dependents= \$373,440 HAP savings= \$3,963 2013-463 households w/3 or more dependents= \$327,840 HAP savings= \$7,860	
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Public Housing Program

CR #4: Increase in Resources Leveraged				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Amount of funds leveraged in dollars (Increase)	Amount leveraged prior to implementation of the activity (in dollars)	Expected amount leveraged after implementation of the activity (in dollars)	Actual amount leveraged after implementation of the activity (in dollars)	Outcome meets or exceeds the benchmark
	\$0.00	\$10,000	2010- 35 Households= \$16,800 2011- 38 Households= \$22,080 2012- 45 Households= \$28,320 2013-38 Households= \$18,240	Benchmark exceeded

There were no hardship requests since the implementation of this activity.

Authorization(s)

Attachment C, Part D, Section 2.a This authorization waives certain provisions of Sections 8(o)(1), 8(o)(2), 8(o)(3), 8(o)(10) and 8(o)(13)(H)-(I) of the 1937 Act and 24

C.F.R. 982.508, 982.503 and 982.518, as necessary to Implement the Agency's Annual MTW Plan.

This authorization is necessary under MTW as there is no provision for capping dependent deductions within current law or regulation.

B-3 Utility Allowance Payments are used to repay participant debts owed to the Housing Authority

PMHA will withhold utility allowance checks for households who owe PMHA money, to be used to repay those debts. Plan Year: 2009 Implementation: 2010.

There were no hardship requests since the implementation of this activity.

Housing Choice Voucher and Public Housing Programs

CE # 4: Increase in Resources Leveraged				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Amount of funds leveraged in dollars (increase)	Amount leveraged prior to implementation of the activity (in dollars). This number may be zero.	Expected amount leveraged after implementation of the activity (in dollars)	Actual amount leveraged after implementation of the activity (in dollars)	Outcome meets or exceeds the benchmark
	\$0.0	\$5,300	2010-27 households repaid \$5,278 2011-110 households repaid \$17,324 2012-94 households repaid \$14,303 2013-74 households repaid \$11,859	Benchmark met

Authorization(s):

Attachment C, Heading D. (2a) of the Standard Agreement. This authorization waives certain sections of 24 CFR 982.518.

B-4 Pro-ration of the utility allowance schedule up to the percentage of pro-ration of funding as established by HUD due to appropriations: Plan Year: 2009

Refer to Section B. Not Yet Implemented Activities

B-5 Single Fund Budget Flexibility: Plan Year: 2009 Implemented: 2013

PMHA used single fund budget flexibility only to address shortfalls caused by the Congressional budget cuts for HAP and Administrative fees for the Housing Choice Voucher program as well as the sequestration later in the year.

CE #4: Increase in Resources Leveraged				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Amount of funds leveraged in dollars (increase)	Amount leveraged prior to implementation of the activity (in dollars). This number may be zero.	Expected amount leveraged after implementation of the activity (in dollars)	Actual amount leveraged after implementation of the activity (in dollars)	Outcome meets or exceeds the benchmark
	\$0.0			

Authorization(s):

Attachment C, Single Fund Budget with Full Flexibility

The authorization waives certain provisions of Sections 8 and 9 of the 1937 Act and 24 C.F.R. 982, and 990 as necessary to implement the Agency's Annual MTW Plan.

B-6 Income verifications conducted for approved government programs may be substituted for PMHA income verifications if performed within the previous 90 days: Plan Year: 2009

Refer to Section B. Not Yet Implemented Activities

B-7 Employment and education deductions

1. Description:

PMHA will continue to give \$500 deductions from annual income where the head of household or spouse is employed 32 hours or more for the HCV Program in the same position or is registered as a full-time student at an educational institution, as defined by the standards of the institution, and maintaining a minimum of a 2.0 grade point average.

Note: This activity was closed out for Public Housing residents as of April 2012. See D. Closed Out Activities.

Plan Year: 1999 Implementation: 2000.

2. Tracking and documenting the implementation of the activity:

Computerized reports detailing rent calculations are used in addition to quality control reviews of participant files.

3. Identifying the intended and possible unintended impacts:

The intended impact results in a savings to households, which has been achieved. There have been no unintended impacts to date.

4. Measuring the impacts of the rent reform activity:

It has been determined that a \$500 deduction results in a monthly rent savings of \$12.50 per month per household. This savings is extended to each household receiving such deductions in order to determine the benefit to each household.

5. Description of Annual Reevaluation of the Activity:

Annually, this information is reviewed by staff and the Director to determine if modifications are needed. The PMHA anticipates keeping this activity “as is” for the foreseeable future.

Housing Choice Voucher Program

SS #2 Increase in Household Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average amount of savings of households affected by this policy in dollars (increase)	Average savings amount of households affected by this policy prior to implementation of the activity (in dollars)	Expected average savings amount of households affected by this policy after implementation of the activity (in dollars)	Actual average savings amount of households affected by this policy after implementation of the activity (in dollars)	Outcome meets or exceeds benchmark
	\$0.0	\$12.50 per month for each participating household	Employment Deduction of \$500= \$12.50 monthly savings per Household 2009-209 HH 2010-127 HH 2011-116 HH 2012-144 HH 2013-137 HH Education Deduction of \$500= \$12.50 monthly savings per Household 2009-73 HH 2010-80 HH 2011-63 HH 2012-59 HH 2013-43 HH Employment and Education	Benchmark met

			Deduction of \$500 each=\$25 per monthly savings per Household 2013=4 HH	
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There have been no rent hardship requests since the implementation of this activity.

If benchmarks were not achieved or if the activity was determined ineffective provide a narrative explanation of the challenges and, if possible, identify potential new strategies that might be more effective:

Authorization(s):

Attachment C, Part D, Section 2.a This authorization waives certain provisions of Sections 8(o)(1), 8(o)(2), 8(o)(3), 8(o)(10) and 8(o)(13)(H)-(I) of the 1937 Act and 24 C.F.R. 982.508, 982.503 and 982.518, as necessary to Implement the Agency’s Annual MTW Plan. PMHA expects that the deductions offered could be provided within the discretionary rent policies available to any housing authority, and will seek to eliminate these features in exchange for lower percentage of income rates for employment.

B. Not Yet Implemented Activities

PH-8 Deduction for Elderly or Disabled Adults: Plan Year: 2009

As indicated in the 2013 plan, this activity has not been implemented. It is unclear if this activity will be implemented in 2014 as an appropriate solution to the issue of verifying medical deductions that maintains affordability for the most vulnerable tenants while eliminating verifications in a responsible manner has not yet been determined.

B-4 Pro-ration of the utility allowance schedule up to the percentage of pro-ration of funding as established by HUD due to appropriations: Plan Year: 2009

There was no need to pro-rate utility allowances for Housing Choice Voucher participants or Public Housing residents in 2013. PMHA has implemented a new utility rent reform that caps the utility allowance payment to the amount of PIPP Plus, an income-based utility program that sets utility bills to a percentage of household income. As a result, the pro-ration utility allowance is not likely to be used. However, there is no change requested for this authorization. Utilization of this authority is dependent on the results of HUD appropriations by Congress.

However, this activity was implemented February 1, 2014 for the Public Housing Program. Metric data will be provided in the 2014 MTW Annual Report accordingly.

B-6 Income verifications conducted for approved government programs may be substituted for PMHA income verifications if performed within the previous 90 days. Plan Year: 2009

This activity was not implemented as the agencies involved determined that the forecasted efficiencies were not going to be realized. The PMHA will consider implementation during 2014 if renewed discussions yield a positive result.

C. Activities on Hold

No activities are on hold.

D. Closed Out Activities

PH-1 Escalating Minimum Rent Plan Year: 2008 Implementation: 2008
 This activity ended in 2011 as specified in the 2012 Annual MTW Plan.

Comment

Minimum Rent of \$25 will increase by \$25 every two years during tenure in Public Housing and will be capped not to exceed \$250 per month, which would be attained after 18 years of Public Housing residency. Households with a head or co-head of household, or spouse who is elderly (62 years of age or older, and/or disabled) will have no minimum rent. Departure or death of the sole elderly or disabled household member will result in the minimum rent requirement being re-instated for remaining household members.

i. Final Outcome and Lessons Learned

This escalating minimum rent feature was originally implemented as an alternative to arbitrary time limits. Benchmarks were achieved, but the feature proved to be very cumbersome in its implementation and operation. As a result, rent reforms permissible under conventional PHA rules were implemented by year-end of 2011, raising the minimum rent to \$50 per month for non-elderly, non-disabled households. The original activity of escalating minimum rent was unwieldy for administration and not helpful for achieving PMHA goals.

ii. There are no statutory exceptions outside of the current MTW flexibilities that might have provided additional benefit for this activity

iii. Summary Table:

<i>CE #5 Increase in PMHA Rental Revenue for Public Housing Households</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Rental revenue in dollars (increase)	Rental revenue prior to implementation of the activity (in dollars)	Expected rental revenue after implementation of the activity (in dollars)	Actual rental revenue after implementation of the activity (in dollars)	Outcome meets or exceeds the benchmark
	\$557,771	Increase of \$30,000	2010- \$587,771 2011- \$622,790	Benchmark met

iv. Additional explanations about outcomes reported in the summary table

While the activity met the projected benchmarks, the implementation yielded a high risk for inaccurate rent calculations due to the fluctuation of minimum rents which would vary among households.

PH-9 Providing Transitional Housing Plan Year: 1999 Implementation: 1999
This activity ended in 2012 as specified in the 2012 Annual MTW Plan.

Comment

Up to 42 units of transitional housing will be set aside for previously homeless families at Renaissance Place and Community Estates. Through partnership with Family and Community Services and its Portage Area Transitional Housing (PATH) program, residents receive on-site intensified case management services as they move toward self-sufficiency.

i Final Outcome and Lessons Learned

During 2012, the long-standing partnership with Family and Community Services and its Portage Area Transitional Housing (PATH) program evolved to address a more permanent supportive housing program as defined by HUD. It was determined that a public housing format was ineffective for the operation of a supportive housing program. Because of the change from a two-year Transitional Housing program to a one-year supportive housing program with the emphasis on transitioning in place, the PMHA found the number and cost of unit turnovers increasing, since not all participants were able and willing to transition in place. Renaissance Place consists of three and four bedroom units. Many of the PATH families required two-bedroom units. With HUD new program guidelines, the landscape of the PATH program changed. PMHA opened its entire housing stock to PATH participants with the emphasis on moving participants into the units with the needed number of bedrooms. However, this approach diluted the relationship between participants and PATH staff. Thus, because of programmatic changes, it became necessary to phase-out the Transitional Housing program by the end of 2012. No future PATH families will be added or moved-in public housing units.

ii There are no statutory exceptions outside of the current MTW flexibilities that might have provided additional benefit for this activity

iii Summary Table:

HC #6: 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)	Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase)	Expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity	Actual increase in households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity	Outcome meets or exceeds the benchmark

		(number)	(number)	
	There was no transitional housing program prior to the implementation of this activity	Minimum of 42 households per year participating in the program	2010-64 2011-64 2012-44	Benchmark met
HC #4: Displacement Prevention				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of previously homeless households at or below 80% AMI that would lose assistance or need to move (decrease)	Households losing assistance/moving prior to implementation of the activity	Expected households losing assistance/moving after implementation of the activity (number)	Actual households losing assistance/moving after implementation of the activity (number)	Outcome meets or exceeds the benchmark
	There was no transitional housing program prior to the implementation of this activity	24 households per year since households could stay a minimum of 2 years and a maximum of 4 years in transitional housing or lose assistance due to non-compliance	2010-22 2011-22 2012-44	Outcomes were met however, in 2012 the transitional housing program was phased out due to new HUD guidelines
HC #6: 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)	Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase)	Expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity (number)	Actual increase in households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity (number)	Outcome meets or exceeds the benchmark
	There was no transitional housing program prior to the implementation of this activity	10 per year	2010-11 2011-22 2012-13	Benchmark met

iv Additional explanations about outcomes reported in the summary table

While the activity met the projected benchmarks and the program proved to transition previously homeless families into permanent housing, the revised HUD regulations made it economically unfeasible to continue this program as public housing. As a result it was incorporated into the Section 8 Voucher program.

PH-11 Deduction for Absent Child

This activity will not be implemented. Plan Year: 2009 Closed Out: 2012

i. Discuss the final outcome and lessons learned

A decision was reached after reviewing the documentation and work efforts needed to verify circumstances involved, the documentation and work efforts needed to verify circumstances involved, the resulting impact on households and further policy discussion relating to desired results on low-income and participating households.

ii. There were no statutory exceptions outside of the current MTW flexibility that might have provided additional benefit for this activity

iii. Provide Summary Table-not applicable

iv. Provide a narrative for additional explanations about outcomes reported in the summary table-not applicable

B-7 Employment and education deductions:

Plan Year: 1999 Implementation: 2000

PMHA discontinued this activity April 2012 for public housing residents. Replacing this activity was the implementation of a 4% deduction on all earned income and an income exclusion for new earnings until annual re-certification.

i. Discuss the final outcome and lessons learned

This activity was implemented to reward work; however, effective April 2012 this activity was replaced with providing a 4% deduction on earned income and an exclusion of all new income until annual re-certification. This was done with the expectation that households will reap a greater reward for achieving earned income. Also, was anticipated that staff time would be saved by the elimination of having to secure third-party documentation for the education deduction which was tedious and time consuming for staff.

Refer to PH-4; PH-6; and PH-7.

ii. There are no statutory exceptions outside of the current MTW flexibilities that might have provided additional benefit for this activity.

iii. Summary Table Follows:

Public Housing Program

SS #2 Increase in Household Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average amount of savings of households affected	Average savings amount of households affected	Expected average savings amount of households affected	Actual average savings amount of households affected	Outcome meets or exceeds benchmark

by this policy in dollars (increase)	by this policy prior to implementation of the activity (in dollars)	by this policy after implementation of the activity (in dollars)	by this policy after implementation of the activity (in dollars)	
	\$0.0	\$12.50 per month for each participating household	Employment Deduction of \$500= \$12.50 monthly savings per Household 2010-60 HH 2011-59 HH Education Deduction of \$500= \$12.50 monthly savings per Household 2010-17 HH 2011-18 HH	Benchmark met

- iv Provide a narrative for additional explanations about outcomes reported in the summary table
 With the replacement of 4% exclusion of wages, the average savings of families is \$18.00 per month.

Authorization(s):

Attachment C, Part D, Section 2.a This authorization waives certain provisions of Sections 8(o)(1), 8(o)(2), 8(o)(3), 8(o)(10) and 8(o)(13)(H)-(I) of the 1937 Act and 24 C.F.R. 982.508, 982.503 and 982.518, as necessary to Implement the Agency’s Annual MTW Plan. PMHA expects that the deductions offered could be provided within the discretionary rent policies available to any housing authority, and will seek to eliminate these features in exchange for lower percentage of income rates for employment.

Section V: MTW Sources and Uses of Funds

Annual MTW Report

V.3.Report.Sources and Uses of MTW Funds

A. MTW Report: Sources and Uses of MTW Funds

Actual Sources and Uses of MTW Funding for the Fiscal Year

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

Describe the Activities that Used Only MTW Single Fund Flexibility

PMHA has no activities that used only MTW Single Fund Flexibility.

V.4.Report.Local Asset Management Plan

B. MTW Report: Local Asset Management Plan

Has the PHA allocated costs within statute during the plan year? Yes

Has the PHA implemented a local asset management plan (LAMP)? or No

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

Has the PHA provided a LAMP in the appendix? or No

Not applicable

V.5.Report.Unspent MTW Funds

C. MTW Report: Commitment of Unspent Funds

In the table below, provide planned commitments or obligations of unspent MTW funds at the end of the PHA's fiscal year.

Account	Planned Expenditure	Obligated Funds	Committed Funds
Total Obligated or Committed Funds:		0	0

In the body of the Report, PHAs shall provide, in as much detail as possible, an explanation of plans for future uses of unspent funds, including what funds have been obligated or committed to specific projects. None Applicable

Section VI. Administrative

A. General description of any HUD reviews, audits or physical inspection issues that require the agency to take action to address the issue.

Portage Metropolitan Housing Authority currently has had no recent HUD reviews. It is in process of its annual audit for FY 2013, and recent physical inspection scores were exemplary.

B. Results of latest PHA-directed evaluations of the demonstration, as applicable.

Not applicable; there are no current PHA-directed evaluations outside of the measurements and observations described earlier in this report.

C. Certification that the PHA has met the three statutory requirements of: 1) assuring that at least 75 percent of the families assisted by the Agency are very low-income families; 2) continuing to assist substantially the same total number of eligible low-income families as would have been served had the amounts not been combined; and 3) maintaining a comparable mix of families (by family size) are served, as would have been provided had the amounts not been used under the demonstration.

Portage Metropolitan Housing Authority certifies that the PHA has met the statutory requirements under the Moving the Work Demonstration.