

**HOUSING AUTHORITY
OF THE COUNTY OF SAN MATEO**

**MOVING TO WORK
ANNUAL REPORT FY2015**



**San Mateo County Board of Supervisors
(Sitting as the Board of Commissioners for the Housing Authority)**

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SECTION I

Introduction

Overview of the Housing Authority of the County of San Mateo's ongoing MTW goals and objectives

The San Mateo County Department of Housing serves as a catalyst for increasing access to affordable rental housing, increasing the supply of workforce housing, and supporting related community development so that housing exists for people of all income levels in San Mateo County. This is the mission statement for the Agency, providing the framework which undergirds the Housing Authority of the County of San Mateo (HACSM) commitment to affordable housing choices for families, promoting the self-sufficiency of program participants, and developing administrative efficiencies. Now in its 15th year in the MTW program the these three goals remain firmly embedded as essential characteristics of each strategy proposed, policy decision made, and program operationalized and implemented.

Since HACSM received HUD approval to expand MTW authority from a small carve out of targeted vouchers to its entire HCV portfolio, HACSM has reduced administrative costs, collaborated with other County of San Mateo Departments and organizations to address the goal of ending homelessness in the local community, expanded and sharpened its focus on activities that increase the potential self-sufficiency of current participants and optimized the overall effectiveness of the agency.

Through collaboration with a broad range of community stakeholders, made possible due to the flexibilities of the MTW program, HACSM has been a leader in taking bold steps in support of San Mateo County residents through program innovation and responsiveness.

As you will see in the updates throughout this annual report, FY2015 has been exceptionally challenging year for affordable housing in San Mateo County. While there have been many reports in the news about the housing crisis in San Francisco, the same is true in San Mateo County, which is part of the greater San Francisco metropolitan area. With vacancy rates for rental housing continuing to be less than 4%, the competition for any available rental unit has resulted in fierce competition for each and every unit and has placed those with vouchers in a position where they simply cannot meet the demands of the market. In FY2015, HACSM requested and was approved to add a new activity titled the "Leasing Success Program." This activity was designed to address some of the very real challenges (aka barriers) that low income families face in this market, for example the need to pay \$2,500 - \$6,500 up front for security deposits, in addition to the first month's rent and any moving costs. Most program participants have savings of less than \$500. The activity also included a Housing Locator Service, to assist in finding and recruiting owners of rental property to join the program and help to facilitate the relationship between voucher holders and the property owners. Although HACSM conducted an RFP process in early 2015, the agency is still in contract discussions with potential awardees – professional,

well-established organizations who, due to the critical housing crisis, are uncertain as to their success in fulfilling the scope of services. Obviously, the need for housing overall, and especially affordable housing, has risen to a critical need in this area and has been the focus of HACSM and the community leaders. The flexibilities provided by the MTW program have been invaluable in having any ability to assist low income families in San Mateo County.

Following are examples from FY2015 that demonstrate the HACSM continued commitments to increasing affordable housing choice, supporting the increased self-sufficiency goals of program participants, and developing administrative efficiencies:

Increasing Affordable Housing Choices

As a result of several MTW flexibilities, HACSM has been able to coordinate with affordable housing developers in the construction and major rehabilitation of long-term affordable units for low income families. Due to the extremely challenging housing market, this strategy has been essential to the preservation of any affordable housing in the community. During FY15 the San Mateo County Board of Supervisors and County Manager named housing as one of, if not the biggest critical need in the County. The Housing Authority, along with the Department of Housing in its entirety has been a key stakeholder in developing creative solutions.

Half Moon Village, new senior affordable housing



Promoting Self-Sufficiency

In addition to the actual “Self-Sufficiency” program itself, HACSM has implemented several activities that explicitly support the goal of increasing the self-sufficiency and self-determined decision making of program participants. These include HACSM’s rent reform program, the Tiered Subsidy Table. This MTW activity gives HACSM the ability to inform participants of the actual maximum amount of housing assistance that HACSM will provide on a monthly basis when they receive their voucher. By providing this factual information on the front end, HACSM can then provide further education for program participants on how to make informed and empowered choices when searching for securing rental housing. In FY2015, due to the significant barriers participants were facing in their housing search, HACSM took their support of program participants a step further and developed a “Renting Success Workshop.” At the workshop, participants learn how to search for housing, how to prioritize their family needs (ie: close to schools, medical centers, transportation), understand their monthly rent portion, how to best present themselves to prospective landlords, and how to talk about their personal situation or potential barriers such as a low credit score, or past eviction, anything that could potentially “dis-qualify” their rental application. While not a MTW activity, the administrative time and cost savings realized from the MTW program has allowed HACSM to develop and present these types of activities for program participants.

HACSM has also continued to expand the self-sufficiency program itself. In FY2015, 77 families graduated from the program and over 200 new families joined the program via the wait list. 95% of these families now have a goal plan and are meeting with HACSM staff at least once every three months through office visits, phone calls, email check in’s and more. The increased frequency of meeting with families has helped HACSM staff to directly work with families to stay on track with their short and long-term goals including increasing their income potential through education and employment advancement, personal growth and increased financial understanding. HACSM has expanded the self-sufficiency program to include a provision of monetary rewards for participants who complete educational goals as well as increase their credit scores and savings, all of which are fundamental steps for someone striving to be self-sufficient. Following is the experience of one of the families who successfully graduated this year with \$1,400 in escrow. Below is the letter that they included when requesting an additional year of assistance through the hardship policy.

Although we have been thorough many obstacles, the biggest one has been being laid off and becoming homeless at the same time. Suddenly the rug got pulled from under our feet and not only did we find ourselves unemployed and but also homeless along with our three kids during the Christmas holiday.



Our lives changed drastically after this event yet while it was the lowest point in our lives we realized that we needed to make things better again for our kids. We looked around and thankfully one of the resources that we were able to find was the moving to work program. The housing subsidy that we have received has allowed us to have a roof over our heads while we have worked on becoming self- sufficient and we are truly thankful for that.

While we could not have believed it while we were going through it, we came out of this experience stronger and more determined. We also realized that continuing with our education would be one of the goals we would need to achieve so that we could get out of

poverty and stop feeling powerless like we felt when we were homeless.

Though it has not been easy, through hard work and determination I am proud to say that

after this semester I only have two more semesters till I finish my BA degree and my husband has two more semesters left so that he can finish up his certificate.

Our main strategy has been that we have dreamed of a better future and have decided that each class that we walked into was guiding us down the path towards a better life.

Jesse Jackson once said, "Both tears and sweat are wet and salty but they render a different result. Tears will get you sympathy, but sweat will get you change." I want to show my boys that even though life is tough and sometimes you might feel like there are so many things stacked up against you nothing is impossible if you are willing to work hard to achieve it.

Being given an extension of our housing will boost our spirit and allow us to finish our education which will be the culmination of all our hard work. It will be of tremendous importance for my husband and I in our quest towards self-sufficiency and will also allow us to set an example for our kids. This is immeasurable.

Were it not for programs like Moving to Work our dreams of getting an education, breaking the cycle of poverty and being an example for our kids could not be possible.

Thank you for your time and consideration.

Sergio and Evelyn Ibanez

Developing Administrative Efficiencies

Since 2008, HACSM has re-designed the processes for both initial and on-going eligibility determinations, easing the burden on both participants and Housing Authority staff and increasing the timeliness of the process. As a result of the success of the biennial recertification schedule for all elderly and/or disabled households, HACSM expanded the timeline to once every three years for elderly and/or disabled families further easing the burden and stress for the families and providing administrative relief for HACSM. HACSM continues to conduct interim recertifications for these households if needed. HACSM is also in its

sixth year of its rent-reform program known as the TST (Tiered Subsidy Table) which created a system that was extremely simple for the end user (HACSM staff and program participants) and as described above, provides participants with the maximum amount of subsidy that Housing Authority will contribute to their rent on a monthly basis.

HACSM's long-term vision for the direction and duration of its MTW program

MTW flexibility has given HACSM the ability to combine resources, through the fungibility of the MTW block grant and thus removed significant financial barriers, allowing HACSM the freedom to better address San Mateo County program priorities and the community needs. The following are focus areas that HACSM has identified and that continue to support this vision:

Serve More Families

In FY13, HACSM researched and developed a strategic plan for using its voucher resources in ways that meet specific goals over the next five years. Three broad goal areas were developed: serving residents most in need, facilitating residents' self-sufficiency, and building sustainable system capacity. Specifically, the plan called for increased Provider-Based Assistance (PBA) partners, increased creation of new affordable units using project-based vouchers, and expansion of the five-year self-sufficiency program. As discussed throughout this Annual Report, HACSM took active steps toward the attainment of each of these strategic goals in FY15.

In FY15, HACSM continued the expansion of its five-year, MTW Self-Sufficiency program. Throughout FY15, all new applicants from the waiting list joined the Self-Sufficiency program. These new program participants have access to greatly expanded and enriched case management services and to quarterly connections with their HACSM Self-Sufficiency Coordinators. As discussed in detail in this Report, the initiative also includes a comprehensive hardship policy for elderly and/or disabled persons as well as for self-sufficiency participants who need some additional time to achieve their goals.

Expand Affordable Housing Partnerships and Project-Based Programs

HACSM has continued to actively use its MTW flexibility to assist in the development of new or rehabilitated affordable housing by strategically project-basing HCV vouchers as a key financial component. Project-Based Vouchers' (PBV) contractual obligation for long-term unit availability is also important in our perennially tight housing market. In FY15, HACSM awarded seven applications for new construction and rehabilitated units under the PBV program, which could, when completed, add up to 264 units of long-term affordable housing in San Mateo County in the next 2-3 years.

Expand Community Partnerships and Commitments with Support Service Providers

In FY15, HACSM has been reviewing the needs of new program participants in the Self-Sufficiency program and as a result of this analysis has conscientiously expanded the program partnerships with a variety of educational institutions, work force development providers, and county and community health and social service providers.

In October 2014, HACSM hosted its 2nd Annual Housing & Resource Expo for all MTW Self-Sufficiency participants and residents of HACSM-owned properties. The EXPO was a great success, linking over 30 vendors from community partners ranging from San Mateo Credit Union, Peninsula Works, JobTrain, Wells Fargo, ReMax, CivicCorps, Voter Registration, to the Employment Development Department, and CA University Nutrition program. Over 100 participants attended and received information on services, gained linkages with organizations to assist with training, resume writing, interviewing skills and employment opportunities.

HACSM has an active Program Coordinating Committee that meets on a quarterly basis to further support leveraging of services on behalf of low-income families in our programs.



Provider Based Assistance Programs (PBA)

In 2011, HACSM used its “block-grant” funding status to create a new rental subsidy program, otherwise known as Provider-Based Assistance or PBA. Using an RFP process, HACSM awarded three contracts for up to three years. Each provider serves a typically underserved population in the HCV program. The first award was given to Community Overcoming Relationship Abuse (CORA), the organization in San Mateo County that serves survivors of domestic violence (15 units). The second award was given to Service League of San Mateo County that serves persons re-entering society after a period of incarceration and who are receiving addiction treatment and other supportive services. The third award was implemented in 2013, with a signed agreement with Human Investment Project (HIP) Housing for their shared housing self-sufficiency program.

In FY15 all three PBA providers continue to have full and active programs, meeting the specific needs of their participants needs both for housing and supportive services. Following is one of the success stories from CORA that clearly shows the profound difference the PBA program has made in the life of this survivor of domestic violence.

Jessica* was a victim of domestic violence when she came to CORA’s emergency shelter over two years ago. Jessica met her abuser when she was 33 years old in Wisconsin. She was going to college to get her Arts degree. Her abuser was manipulative from the beginning of the relationship. He controlled Jessica in every aspect of her life. He made her quit her school and even move to California, away from her family and friends. She was hoping that with a fresh start things would be better for them –

but things only got worse.

Jessica became pregnant and had to stop working since she had a complicated pregnancy. Her abuser was verbally and mentally abusive throughout her pregnancy. He called her names, told her horrible things about herself to break her self-esteem. Once her daughter was born, he became physically abusive once again. She never knew what mood he would be in when he would come home from work. He made her live in fear for years after her daughter was born. One day she took her daughter to the park. She was very sad and desperate. A woman saw her and started talking to her; she gave her CORA's information for help and shelter.

After many months of getting the courage to leave, Jessica called CORA and came into shelter the following day. She filed a restraining order and enrolled in school. She had a lot of healing to do. When the CORA family advocate first started working with Jessica, she was suffering from severe anxiety, PTSD and depression. She was seeing someone at CORA for counseling. Jessica and her CORA family advocate worked every week on her goals and the things she needed coming into the PBA permanent housing program. Jessica was determined not to quit her college education this time. She looked for apartments for weeks but was unable to find anything. CORA found a place with one of its perspective property owners.

Since she moved into her own place, Jessica has made more progress. She is assertive, happy, and confident. She now has the tools and skills she needs to become self-sufficient. Jessica has transferred to a University on a full scholarship to get her degree in Therapeutic Art for children. She is working with San Mateo Credit Union to open her own business. Jessica continues to work on her healing and her goals. She is doing very well in the program. Jessica has accessed other resources like HIP Housing, Samaritan House, and Party Child. She has been in the program for two years and continues to amaze her family advocate with her perseverance and her will to strive.

*Not client's real name.

SECTION II

General Housing Authority Operating Information

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			Description of Project		
Ocean View Senior Apartments			31						The Ocean View Senior Apartments is an existing 100-unit affordable apartment building located in Pacifica, CA. The residential property serves low-income seniors and has 100 one-bedroom units. The property will undergo major upgrades to the building systems and building improvements. Rehab work is expected to be completed end of 2016.		
Half Moon Village, Phase II			114			114			Half Moon Village is a 115-unit affordable new construction senior development located in Half Moon Bay, CA. With the exception of the manager unit, all units will be covered by project-based vouchers serving low-income senior households. This property is part of the bigger Half Moon Village development where it will serve a total of 160 low-income senior households.		
Foster Square			33			33			Coastside Senior Housing is a 66-unit affordable new construction senior development located in Foster City, CA. 33 units will be covered by project-based vouchers serving low-income senior households. Construction is expected to be completed in early 2016.		
Mission Street Family Housing			26			26			Mission Street Family Housing is a 52-unit affordable multi-family new construction development located in Daly City, CA. 26 units will be covered by project-based vouchers serving low-income families. Construction is expected to be completed in late 2016.		
									Anticipated Total Number of Project-Based Vouchers Committed at the End of the Fiscal Year *		
Anticipated Total Number of New Vouchers to be Project-Based *			204			Actual Total Number of New Vouchers that were Project-Based			204		
204			173						Actual Total Number of Project-Based Vouchers Committed at the End of the Fiscal Year		
									31		
									173		

* From the Plan

Other Changes to the Housing Stock that Occurred During the Fiscal Year											
n/a											
n/a											
n/a											
<p>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.</p>											

General Description of Actual Capital Fund Expenditures During the Plan Year											
<p>The HACSM Capital Fund grant is generated by a very small Public Housing inventory. In CY2014, HACSM recieved just \$28,612 in Capital Funds and \$10,236 in Operating Subsidy. For the 30 units of Public Housing at El Camino Village (Development #CA014000004), in FY2015, HACSM completed kitchen remodels to resident units. The total expenditure on the project was approximately \$198,000, therefore use of MTW block grant funds was necessary.</p>											

Overview of Other Housing Owned and/or Managed by the PHA at Fiscal Year End											
Housing Program *		Total Units		Overview of the Program							
n/a		0		n/a							
n/a		0		n/a							
n/a		0		n/a							
Total Other Housing Owned and/or Managed		0									
<p>* 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.</p>											
If Other, please describe:				n/a							

Leasing Information

Actual Number of Households Served at the End of the Fiscal Year			
Housing Program:	Number of Households Served*		
	Planned	Actual	
Number of Units that were Occupied/Leased through Local Non-Traditional MTW Funded Property-Based Assistance Programs **	18	36	
Number of Units that were Occupied/Leased through Local Non-Traditional MTW Funded Tenant-Based Assistance Programs **	13	14	
Port-In Vouchers (not absorbed)	0	0	
Total Projected and Actual Households Served	31	50	
* 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		
	Planned	Actual	
Number of Units that were Occupied/Leased through Local Non-Traditional MTW Funded Property-Based Assistance Programs ***	216	432	
Number of Units that were Occupied/Leased through Local Non-Traditional MTW Funded Tenant-Based Assistance Programs ***	13	168	
Port-In Vouchers (not absorbed)	0	0	
Total Projected and Annual Unit Months Occupied/Leased	229	600	
In FY15 the differences between planned and actual households served is due to additional households porting in to San Mateo County, for which there is no way for HACSM to determine this ahead of time.			
*** 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				

Housing Authority of the County of San Mateo

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	X	X	x	50	50	X	X	X
Number of Local, Non-Traditional MTW Households with Incomes Below 50% of Area Median Income	X	X	x	50	50	X	X	X
Percentage of Local, Non-Traditional MTW Households with Incomes Below 50% of Area Median Income	X	X	x	100%	100%	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	1471	0	1471	38.00%
2 Person	X	1041	0	1041	27.00%
3 Person	X	570	0	570	15.00%
4 Person	X	434	0	434	11.00%
5 Person	X	201	0	201	5.00%
6+ Person	X	148	0	148	4.00%
Totals	0	3865	0	3865	100.00%

Explanation for Baseline Adjustments to the Distribution of Household Sizes Utilized

The baseline number represents all HCV households served in May 2010, when HACSM expanded the MTW activities to all HCV households.

Housing Authority of the County of San Mateo

Mix of Family Sizes Served							
	1 Person	2 Person	3 Person	4 Person	5 Person	6+ Person	Totals
Baseline Percentages of Household Sizes to be Maintained **	38%	27%	15%	11%	5%	4%	1
Number of Households Served by Family Size this Fiscal Year ***	1585	1079	455	365	210	134	3828
Percentages of Households Served by Household Size this Fiscal Year ****	41%	28%	12%	10%	5%	4%	1
Percentage Change	9%	4%	-21%	-13%	10%	-12%	0
Justification and Explanation for Family Size Variations of Over 5% from the Baseline Percentages	Changes in household size were due to changes in household composition of the existing families, and the make up of the new families admitted to the program. This is a natural occurrence as HACSM does not target applicants based on family size.						
* "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
Housing Choice Vouchers	During the reporting period, San Mateo county continues to experience extremely tight rental market and outrageously high unit rents. The challenges that voucher holders are having to compete with high paid technology and biotech workers for the same limited market. To address this situation, HACSM has increased its project based vouchers to secure long term affordability, has collaborated with affordable housing developers, and private market landlords. HACSM plans to increase subsidy amounts to all bedroom sizes for voucher holders.
n/a	n/a
n/a	n/a

Number of Households Transitioned To Self-Sufficiency by Fiscal Year End		
Activity Name/#	Number of Households Transitioned *	Agency Definition of Self Sufficiency
MTW Self Sufficiency Program/Activity #2000-1	77	Household reached the end of their voucher term, and/or reached an income level that HACSM paid \$0 subsidy for a maximum period of 90 days.
Housing Readiness Program/Activity #2009-2	17	Household reached the end of their voucher term, and/or reached an income level that HACSM paid \$0 subsidy for a maximum period of 90 days.
Tiered Subsidy Table/Activity #2010-9	19	The household reached an income level such that HACSM paid \$0 subsidy for a maximum period of 90 days.
n/a	n/a	n/a
Households Duplicated Across Activities/Definitions	0	
ANNUAL TOTAL NUMBER OF HOUSEHOLDS TRANSITIONED TO SELF SUFFICIENCY	113	* The number provided here should match the outcome reported where metric SS #8 is used.

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 Housing Choice Voucher Program	Community-Wide	15391	Open	yes		
Federal MTW Housing Choice Voucher Program (Project-Based, 636 El Camino)	Site Based	603	Closed	No		
Federal MTW Housing Choice Voucher Program (Project-Based, Coastside Senior Housing)	Site Based	186	Closed	No		
Federal MTW Housing Choice Voucher Program (Project-Based, Delaware Place)	Site Based	1766	Closed	No		
Federal MTW Housing Choice Voucher Program (Project-Based, Delaware Pacific)	Site Based	1865	Closed	No		
Federal MTW Housing Choice Voucher Program (Project-Based, Edgewater Isle)	Site Based	842	Closed	No		
Federal MTW Housing Choice Voucher Program (Project-Based, Hillside Terrace)	Site Based	1869	Closed	No		
Federal MTW Housing Choice Voucher Program (Project-Based, Half Moon Village)	Site Based	266	Open	yes		

Wait List Information at Fiscal Year End

Federal MTW Housing Choice Voucher Program (Project-Based, Magnolia Plaza)	Site Based	652	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Midway Village)	Site Based	1042	Partially Open	yes
Federal MTW Housing Choice Voucher Program (Project-Based, Newell)	Site Based	735	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Pacific Oaks)	Site Based	288	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, Redwood Oaks)	Site Based	1220	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, St. Matthew)	Site Based	1062	Open	yes
Federal MTW Housing Choice Voucher Program (Project-Based, Willow Terrace)	Site Based	1187	Closed	No
Federal MTW Housing Choice Voucher Program (Project-Based, The Woodlands)	Site Based	1021	Partially Open	yes

Wait List Information at Fiscal Year End				
Federal MTW Public Housing Units	Site Based	1510	Partially Open	yes
More can be added if needed.				
* <i>Select Housing Program</i> : Federal MTW Public Housing Units; Federal MTW Housing Choice Voucher Program; Federal non-MTW Housing Choice Voucher Units; Tenant-Based Local, Non-Traditional MTW Housing Assistance Program; Project-Based Local, Non-Traditional MTW Housing Assistance Program; and Combined Tenant-Based and Project-Based Local, Non-Traditional MTW Housing Assistance Program.				
** <i>Select Wait List Types</i> : Community-Wide, Site-Based, Merged (Combined Public Housing or Voucher Wait List), Program Specific (Limited by HUD or Local PHA Rules to Certain Categories of Households which are Described in the Rules for Program Participation), None (If the Program is a New Wait List, Not an Existing Wait List), or Other (Please Provide a Brief Description of this Wait List Type).				
*** For Partially Open Wait Lists, provide a description of the populations for which the waiting list is open.				
Federal MTW Housing Choice Voucher Program (Project-Based, Midway Village): The waiting list is open for 3 and 4-bedroom units only				
Federal MTW Housing Choice Voucher Program (Project-Based, The Woodlands): The waiting list is open for 4-bedroom units only				
Federal MTW Public Housing Units: The waiting list is open for 4-bedroom units only				
If Local, Non-Traditional Program, please describe:				
n/a				
n/a				
n/a				
If Other Wait List Type, please describe:				
n/a				
n/a				
n/a				
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.				
n/a				

SECTION III

Proposed MTW Activities: HUD approval requested

“All proposed activities that are granted approval by HUD are reported on in Section IV as ‘Approved Activities’.”

SECTION IV

Approved MTW Activities: HUD approval previously granted

Implemented Activities

Activity #2000-1: MTW Self-Sufficiency Program

Approved by HUD: FYE2000

Implemented by HACSM: 5/1/2000

Description of the activity

The HACSM MTW program, first implemented in May 2000, was originally developed to respond to welfare reform and thus was fashioned to focus almost exclusively on improving families' self-sufficiency in preparation for the conclusion of their welfare assistance. The core design of HACSM's original MTW program consisted of limiting Housing Choice Voucher assistance to a maximum of six years, while at the same time offering self-sufficiency services to those participants. In FY10 HACSM changed the voucher term to a maximum of five years. Through December 2013, in order to reach the target population, HACSM only accepted new admissions through a referral process. The referring agencies included the SMC county welfare and social service departments, a drug treatment facility, and/or local homeless shelters. In addition to referring eligible families for admission to the MTW program, these same referring agencies signed agreements with HACSM to provide appropriate case management services to the family throughout the term of their subsidized housing assistance.

In FY2014, upon HUD approval, HACSM implemented several revisions to this activity, including the following: 1) January 2014, HACSM opened its HCV waitlist and with this opening began the enrollment of new households in the MTW Self-Sufficiency program, 2) All new program participants from the HACSM waiting list are automatically enrolled in the MTW Self-Sufficiency program, thus eliminating the direct referral process and 3) HACSM expanded the number of vouchers allocated to the 5-year time limited program to from 300 up to 800 vouchers.

All MTW Self-Sufficiency participants are required to participate in the HACSM Family Self-Sufficiency (FSS) program, which requires families to be gainfully employed and free of welfare assistance 12 months prior to the end of the FSS contract. Non-compliance with the FSS contract is cause for termination of

housing assistance. HACSM collaborates with county and non-profit service providers to prepare MTW households to be economically self-sufficient upon graduation. With the flexibility afforded through the MTW program, HACSM designed a local method by which escrow is calculated for the FSS program participants at the time of graduation. In FY14, due to the fact that this MTW Activity #2000-4 (Escrow Accounts) was so integrally related to the self-sufficiency goals of program participants, HACSM combined these two activities under Activity #2000-1 for reporting purposes.

The HACSM escrow calculation method considers several activities that support a family's increasing self-sufficiency, which are often necessary for an individual to be job-ready and positioned for higher paying positions, instead of only recognizing increases in earned income. The maximum escrow credit and pay out at graduation is \$3,500 per family. Because escrows are only calculated and credited at the end of the FSS Contract term, interim withdrawals were eliminated.

The HACSM-designed calculation methodology is as follows:

- *Employment:* In order to qualify, at program exit, the family must achieve either: 1. The lesser of \$1,500 or a 15% increase over the above stated Earned Income baseline if the baseline amount is more than \$2000, or 2. A \$10,000 increase over the above stated Earned Income baseline if the baseline amount is \$2000, or less. HACSM will calculate escrow based on a dollar for dollar match up to \$1,000. (\$1,000 maximum per family under this category)
- *Education/Vocational Degree Attainment:* \$500 for each completed education/vocational goal. (\$1,000 maximum per family under this category)
- *Personal Enrichment/Job Preparation:* \$25 for each workshop, skill improvement training completed. (\$250 maximum per family under this category)
- *Path to Citizenship:* \$250 for each goal completed per family member in this process.(\$500 maximum per family under this category)
- *Budgeting/Saving Series:*
 - Attend a HACSM-sponsored budgeting class within the first six months of program entry. (\$25)
 - Prepare and submit to HACSM a personal budget for six months following the budgeting class. (\$100)
 - Establish (open) a new savings account within the first year of program entry or a secured credit card to re-establish credit. Once credit has been established, open a savings account. (\$25)
 - Establish a pattern of savings by: a. Increase savings balance over the savings baseline by at least \$1500, AND b. During the final 12 months of participation, make a minimum of 10 monthly deposits of at least \$25, AND c. Any monthly withdrawals may not cause the deposit amount to be less than \$25. (\$400)
Note: Retirement accounts will not be considered as savings accounts.
(\$500 maximum per family under this category)
- *Improve Credit Score:* \$1 for each credit score point improved over the Credit Score baseline. (\$250 maximum per family under this category)
- *Personal Participant Pay Point from Individual Training and Service Plan (ITSP).* Qualifying goals include: Transportation, child care, fulfilling student loan obligations, expunging criminal records, and resolving outstanding child support payments. \$250 for each Personal Participant goal completed.(\$500 maximum per family under this category)

Impact of the activity

In FY2015, HACSM enrolled 196 new families from the MTW Wait List to the program and 72 families graduated.

There were 27 families who requested a hardship extension in FY2015. Based on the hardship policy, HACSM approved 24 of the requests. Although not a part of the Standard Metrics, HACSM has also been monitoring the housing outcomes for families exiting the program. In FY2015, of the 77 households who graduated from the program, none of the families expressed that they would have to enter shelter or become homeless graduation.

In late FY2015, HACSM implemented an additional hardship policy in response to the affordable housing crisis in San Mateo County and in support of program participants. The additional policy criteria allows participants who are near the end of their term of assistance to request up to two additional 12 month terms of assistance due to the San Mateo County “Tight Rental Market.” In order to qualify, all four of the following thresholds must be met: 1) At the time of program exit, the average vacancy rate in San Mateo County for rental units is less than 4% during the previous 6-month period, and 2) The HCV utilization rate is below 95%, 3) The family’s annual gross income is below 80% of AMI, and 4) The family agrees to actively participate in the MTW Self Sufficiency case management services. During FY15, nine households requested hardship extensions due to the “tight rental market” criteria and all nine were granted 12 month extensions.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
SS #1: Increase in Household Income					
Average earned income of households (\$)	As established in FY10, the average earned income of households at entry was \$17,858	Expected increase in average earned income of \$500 annually of households affected by this policy prior to implementation.	The average earned income of current participants was \$20,094	Benchmark Achieved	N/A
SS #2: Increase in Household Savings					

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
Average savings of households (\$)	As established in FY13, the average savings per household was \$569	Expected \$100 increase in savings per household	Actual average savings per household was \$409	Benchmark not achieved	HACSM is actively monitoring this benchmark. While savings is one of the major goals for the program, most participants are in their first year of the program and just now beginning to learn about and establish savings. Several households also had credit issues that required addressing prior to being able to open a traditional checking or savings account. HACSM is continuing to closely work with these households on a quarterly basis.
SS #3: Increase in Positive Outcomes in Employment Status (Based on Head of Household Information)					
Employed Full Time	FY13 nine (9) HOH who graduated from the program were employed full time at program entry	Expected number of HOH employed full time: 15	76 HOH employed full time	Benchmark Achieved	N/A
Employed Part Time	FY13 two (2) HOH who graduated from the program were employed part time at program entry	Expected number of HOH employed part time: 10	87 HOH employed part time	Benchmark Achieved	N/A
Enrolled - Ed Program	FY13 five (5) HOH who graduated from the program were enrolled in an education program	Expected number of HOH enrolled in education program: 10	49 HOH were enrolled in education programs	Benchmark Achieved	N/A
Enrolled – Job Training	FY13 five (5) HOH who graduated from the program were enrolled in a job training program	Expected number of HOH enrolled in job training program: 10	22 HOH enrolled in job training programs	Benchmark Achieved	N/A

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
Unemployed	FY13, eight (8) HOH who graduated from the program were unemployed at program entry	Expected number of HOH unemployed: 10	101 HOH were unemployed	Numeric Benchmark not achieved	As with the savings metric above, most of the program participants are within the first year of their participation and just beginning their goal plans of education, employment and savings. HACSM staff are working very closely with these households to secure employment and/or education to become employed. Also, in many of these households, although the HOH is currently unemployed, there are other adult household members that are working, thus the family as a whole does have earned income.
SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)					
Number of households receiving TANF assistance	131 families were receiving TANF at program entry. In FY13, 83 families were receiving TANF	Decrease in the number of families receiving TANF by 10 families per year	36 household were receiving TANF after implementation.	Benchmark Achieved	N/A
SS #5: Households Assisted by Services that Increase Self-Sufficiency					
Number of households receiving services aimed to increase self-sufficiency	In FY13, 19 families completed financial, employment, and educational workshops	HACSM expects 30 of the households receiving self-sufficiency services after implementation	243 households received self-sufficiency services.	Benchmark Achieved	N/A
SS#6: Reducing Per Unit Subsidy Costs for Participating Households					
Average amount of Section 8 subsidy per household (\$)	In FY12, the average amount of Section 8 subsidy per household was \$1331	HACSM expects the average subsidy per household after implementation to remain consistent at \$1331	Average subsidy per household was \$1,142	Benchmark Achieved	N/A
SS#8: Households Transitioned to Self-Sufficiency					
Number of households transitioned to self-sufficiency	Zero (0) households transitioned to self-sufficiency prior to implementation	Expected number of households transitioned to self-sufficiency: 10/year	77 households transitioned to self-sufficiency.	Benchmark Achieved	N/A

The HACSM definition of Self-Sufficiency includes the following:

- The household has reached an income level such that HACSM is no longer providing subsidy on behalf of the family for a period of 90 days

- The household has reached the end of the voucher's time limit and will be graduating from the FSS program.

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2009-2: Housing Readiness Program (HRP)

Approved by HUD: FYE2009

Implemented by HACSM: 7/1/2008

Description of the activity

Through partnerships with San Mateo County’s Center on Homelessness and other providers of homeless services, HACSM is able to serve up to 100 homeless families. Homeless families join the program through a referral process. Program participants receive rental subsidy for up to three years while at the same time having continued access to various supportive services programs, provided by the homeless services partners.

Impact of the activity

To date, the HRP has provided the San Mateo Community a key program to address the needs of homeless individuals and families residing in San Mateo County. In FY2015, HACSM accepted 46 referrals from the Homeless Services Partners and subsequently 10 new homeless households were admitted to the Housing Readiness Program. In total HACSM assisted 110 different households in FY15.

Since one of the program designs includes a three-year term of participation, in FY15 17 households graduated from the program. Additionally, HACSM received 18 requests for hardship extensions and granted 14 of the requests. As with the five-year self-sufficiency program, upon implementation of the expanded hardship policy Housing Readiness participants were also eligible to request additional assistance due to the “Tight Rental Market” hardship policy. In order to qualify, all four of the following thresholds must be met: 1) At the time of program exit, the average vacancy rate in San Mateo County for rental units is less than 4% during the previous 6-month period, and 2) The HCV utilization rate is below 95%, 3) The family’s annual gross income is below 80% of AMI, and 4) The family agrees to actively participate in the MTW Self Sufficiency case management services. Two additional families requested and were granted additional time on the program as a result of this policy.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
SS #1: Increase in Household Income					
Average earned income of households (\$)	Average earned income of households affected by this policy in FYE13 was \$19,339	Expected average earned income in households affected by this policy after implementation is \$20,500	Average earned income of households affected by this policy: \$16,364	Benchmark not achieved	One of the specific program designs for this MTW activity is that the case management services are provided by the referring agency. As such, HACSM cannot control the amount or directness of the supportive services provided. Additionally, the households referred to this program are homeless and

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
					many have other significant barriers such as substance abuse and, at time, mental health issues. The program was designed based on the “housing first” model and thus, at entry the individuals referred may have additional challenges to increasing their earned income.
SS #2: Increase in Household Savings					
Average savings of households (\$)	Average savings per household at program entry in FY13 was \$249	Expected increase in savings per household: \$100	Actual average savings per household: \$496	Benchmark Achieved	28 households have established a checking and/or savings account. According to Case Manager Report, the average was \$1,084 per household.
SS #3: Increase in Positive Outcomes in Employment Status (Based on Head of Household Information)					
Employed Full Time	In FY12, 11 HOH employed full time	Expected number of HOH employed full time: 11	16 HOH employed full time	Benchmark Achieved	N/A
Employed Part Time	In FY12, 12 HOH employed part time	Expected number of HOH employed part time: 10	17 HOH employed part time	Benchmark Achieved	N/A
Enrolled - Ed Program	In FY12, zero (0) HOH enrolled in an education program	Expected number of HOH enrolled in education program:10	13 HOH enrolled in education program	Benchmark Achieved	N/A
Enrolled – Job Training	In FY12, zero (0) HOH enrolled in a job training program	Expected number of HOH enrolled in job training program: 10	2 HOH enrolled in job training program	Benchmark not achieved	Upon review, and on-going reports from the case managers, this low number seems directly related to the needs and special circumstances of this population. Many participants in the Housing Readiness Program have medical situations that make participation in regular education challenging. Also, several are not enrolled in education programs because they are already working full time.
Unemployed	In FY12, 11 HOH unemployed	Expected number of HOH unemployed: 10	16 HOH unemployed after implementation	Benchmark Achieved	Families in the housing readiness program often have other adult members who are actively working. So while this outcome is higher in FY15, overall the program participants are making significant progress in their increasing overall self-sufficiency. According to the Case Manager report, 6

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
HOH are were unemployed.					
SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)					
Number of households receiving TANF assistance	In FY12, 13 households were receiving TANF at program entry	Expected average of households receiving TANF: 10 Households	7 households were receiving TANF	Benchmark Achieved	N/A
SS #5: Households Assisted by Services that Increase Self-Sufficiency					
Number of households receiving services aimed to increase self-sufficiency	Zero families were receiving self-sufficiency services prior to implementation of the activity	HACSM expects 40 household to receive self-sufficiency services after implementation of the activity	53 households received self-sufficiency services	Benchmark Achieved	N/A
SS#6: Reducing Per Unit Subsidy Costs for Participating Households					
Average amount of Section 8 subsidy per household (\$)	In FY12, the average amount of Section 8 subsidy per household: \$908	HACSM expects the average subsidy per household after implementation to remain consistent with overall MTW program at: \$1200	Average subsidy per household: \$754	Benchmark Achieved	In FY15, the per unit subsidy cost for the HRP program has been less than the MTW program overall. HACSM attributes this to two factors, the first is that over 50% of the HRP households consist of a single member and secondly, due to the challenges in the San Mateo County rental market, HRP households are increasingly seeking out “shared housing” options. Both of these factors have reduced the per household average subsidy.
SS#8: Households Transitioned to Self-Sufficiency					
Number of households transitioned to self-sufficiency	Zero (0) households transitioned to self-sufficiency prior to implementation	Expected number of households transitioned to self-sufficiency: 10/year	17 households transitioned to self-sufficiency.	Benchmark Achieved	N/A

The HACSM definition of Self-Sufficiency includes the following:

- The household has reached an income level such that HACSM is no longer providing subsidy on behalf of the family for a period of 90 days
- The household has reached the end of the voucher’s time limit and will be graduating from the Housing Readiness program.

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2000-3: Eliminate 40% Affordability Cap at Initial Move-In/Lease Up

Approved by HUD: FYE2000

Implemented by HACSM: 5/1/2000

Description of the activity

The original MTW contract, executed in 2000, allowed HACSM to eliminate limits on the proportion of household income that could be spent on housing costs for its initial 300 time-limited MTW clients. In the FY2009 MTW Annual Plan, HACSM received HUD approval to expand this initiative to the entire HCV program.

This MTW activity is designed to support a family's ability to have greater housing choice, through having access to cities throughout San Mateo County. Prior to July 2009, many HCV applicants leasing up for the first time, and participants in the relocation process, were unable to secure housing outside high poverty areas due to the restrictive 40% affordability cap.

Although the hard affordability cap has been eliminated, HACSM continues to play a major role in negotiating rents on behalf of the participant when needed and has established safeguards to ensure the tenant portion of rent is affordable to the participant. Safeguards include, but are not limited to:

- Discussion of rent affordability with the participant before move-in
- Outreach to property owners to increase housing availability
- A calculation tool that shows the tenant portion of rent in relation to his/her income with the additional of excluded income sources that might mitigate the higher rent burden.
- Required supervisory approval procedures on a case-by-case basis for instances where the tenant rent burden is over 50% of their monthly adjusted income.

Impact of the activity

In FY2015, San Mateo County continued to be one of *the* highest cost of living communities in our nation. In July 2014, the National Low Income Housing Coalition noted that San Mateo County was one of the least affordable counties in the country in which to rent in their "Out of Reach 2014" report. With a vacancy rate that has not exceeded 2.5-3% for the last few years, current participants and new applicants searching for affordable housing in San Mateo County are faced with an extremely challenging and competitive housing crisis.

Since implementation, HACSM has found that this activity has provided some necessary relief to those engaged in a search for affordable housing in San Mateo County. In FY 2015, HACSM continued to monitor the lease up statistics, voucher utilization, and the prevailing rent burden for participants to ensure that vouchers are being utilized and participants are not facing an overly burdensome cost for housing. Upon review of the 266 new HAP Contracts initiated in FY2015, 200 of households were paying up to 40% of their monthly adjusted income towards their rent, 37 of households were paying between 41-50% of their

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monthly adjusted income towards their rent, and 29 of households were paying 50% or more of their monthly adjusted income towards their rent. In FY2015 HACSM received 593 Request for Tenancy Approvals (RTAs) and had to deny 27, approximately 5%, due to affordability exceeding 50% of the household’s monthly adjusted income. Without this activity, the reality of finding and securing a new home would be even more bleak with the current realities of the San Mateo County housing market.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
HC #5: Increase in Resident Mobility					
Number of households able to move to a better units and/or neighborhood of opportunity as a result of the activity (increase).	Zero (0) families.	HACSM expects that 20 households will be able to move to a better unit and/or neighborhood of opportunity after implementation.	32 households were able to move to a better unit and/or neighborhood of opportunity. ?	Benchmark Achieved	As discussed above, the San Mateo County rental market is extremely competitive. The Housing Authority is actively working with affordable housing developers through the Project Based Voucher Program and the Housing and Community Development Department to finance new and rehabilitation projects that will increase the supply of affordable housing that is transit oriented and located in neighborhoods of opportunity.

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2000-4: Escrow Accounts

Approved by HUD: FYE2000

Implemented by HACSM: 5/1/2000

This activity has been combined with Activity #2000-1: MTW Five-Year Self-Sufficiency Program as the two activities are integrally linked.

Activity #2009-5: Expand Usage of PBV at HACSM Developments Undergoing Disposition

Approved by HUD: FYE2009

Implemented by HACSM: 7/1/2009

Description of the activity

In HACSM’s FY2009 Supplemental MTW Annual Plan, HACSM received approval to project-base up to 100% of the replacement vouchers at public housing units undergoing the demo/dispo process. HACSM submitted two demo/dispo applications in June 2010. The application for Midway Village was approved by HUD in January 2011 and vouchers were issued to all eligible households, 149 vouchers in total, in May 2011. All 150 units at Midway Village are now under a Project-Based HAP contract. The application for El Camino Village was not approved by HUD.

Impact of the activity

In late FY15, HACSM received its Commitment to Enter into a HAP (CHAP) from HUD. As such, HACSM does not have any statistically updates from FY2015 for this activity. HACSM has provided the baseline, benchmark information for this activity below.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
HC#4: Displacement Prevented					
Number of households at or below 80% AMI that would lose assistance or need to move (decrease).	30 households at El Camino Village could lose their housing assistance or need to move prior to implementation	Two (2) households	N/A	N/A	N/A

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2010.6 (Revised): Triennial Recertification Schedule for Elderly/Disabled Families

Approved by HUD: FYE2010

Implemented by HACSM: 7/1/2009

Description of the activity

Building upon the success of the original activity “Biennial Recertification Schedule for Elderly/Disabled Families,” in FY14 HACSM expanded the regular recertification schedule to once every three years for Elderly/Disabled households. As with the initial biennial activity, if the household also includes non-elderly/disabled adult members, and those members experience an increase in income, HACSM may recalculate the households annual adjust income in accordance with the HACSM’s Interim Policy, and potentially the HAP as well, due to the increase.

Impact of the activity

HACSM began implementation of this alternate recertification schedule in August 2014. Due to the gradual roll out, implementation will take approximately 24 months in total.

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE #1: Agency Cost Savings					
Total cost of task (\$)	In FY14, the cost of completing this task was \$154,085	HACSM expects that the cost for completing this task to not exceed \$118,645	In FY15, the cost to complete this task was \$ 32,185	Benchmark achieved	N/A
CE #2: Staff Time Savings					
Total time to complete the task in staff hours	Total amount of staff time dedicated to the task prior to implementation of the activity was 2949 hours	Expected amount of total staff time dedicated to the task after implementation of the activity 1800 hours	In FY15, it required 618 hours to complete this task	Benchmark achieved	N/A
CE #5: Increase in Agency Rental Revenue					
Rental revenue in dollars	Rental revenue prior to implementation	Expected rental revenue after implementation	N/A – This activity has no impact on the “rental revenue” of the agency	N/A	N/A

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2010-7: Simplify Rent Calculation Process

Approved by HUD: FYE2010

Implemented by HACSM: 7/1/2009

Description of the activity

In July 2009, HACSM implemented several MTW activities related to the rent calculation policies and procedures. It was HACSM's intent that implementing the new activities would create a more transparent process for participants, a streamlined and more efficient practice for HACSM, and overall improvement in the accuracy of the calculations. In July 2011, HACSM modified the activities resulting in the following:

- Asset Calculations
 - HACSM established a minimum threshold of \$50,000 in assets before any interest would be included or calculated when determining the household's annual adjusted income
 - If the household met, or exceeded the \$50,000 threshold, HACSM will include the *actual* interest earned in determining the household's annual adjusted income

Effective July 1, 2013, HACSM eliminated the EID portion of this activity as all current program participants were realizing greater benefit from the alternate recertification schedule, coupled with the HACSM interim policy

Impact of the activity

Since implementation, the streamlined method for calculating assets has significantly simplified the rent calculation process without creating further burden for program participants. In FY15, due to the new Standard Metrics reporting requirements, HACSM experienced an increase in staff time and administrative expense, due to the need to again capture, log, and track all participant assets regardless of their value. As was the case prior to initial implementation, most participants have assets less than \$1,200, so the administrative savings previously realized through this activity have been significantly reduced due to the increase in data tracking.

In FY15 the total gross assets of program participants was \$2,855,020 and thus the averaged the result of any interest earned at the current rate of .05%, was \$948. The low amount realized through this estimation has no financial impact for HACSM. In FY15, there were only 10 households with assets greater than \$50,000. In total, their assets equaled \$959,022, and on average, each household had \$95,902 in gross assets. As directed through this activity, HACSM staff included the actual interest earned to the annual income calculation for these households.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE #1: Agency Cost Savings					
Total cost of task (\$)	In FY14, the cost of calculating the annual adjusted income for 3,102 households seen was \$59,774.	N/A	To calculate the annual adjusted income (AAI) for the 2860 households seeing in FY15, the agency cost was \$59,579	N/A	As reported previously, HACSM is unable to determine the cost of this task prior to implementation of the activity as it was not specifically delineated in the original staff time study. In this report, HACSM is using the difference in cost based on the total number of households seen in FY15 vs. FY14.
CE #2: Staff Time Savings					
Total time to complete the task in staff hours	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)	950 hours complete calculation of the household's AAI	N/A	(See narrative for the determination of the Agency Cost Savings for this activity)
CE #3: Decrease in Error Rate of Task Execution					
Average error rate in completing the task (%)	Average error rate of task prior to implementation (%)	Expected average error rate of task after implementation (%)	3% of files reviewed had errors related to assets	Benchmark Achieved	N/A
CE #5: Increase in Agency Rental Revenue					
Rental revenue in dollars	Rental revenue prior to implementation	Expected rental revenue after implementation	N/A – This activity has no impact on the “rental revenue” of the agency	N/A	Due to the low dollar value of program participant’s assets, and the rent reform program calculation, this activity has no direct impact on the “rental revenue” for HACSM.

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2010-8: Simplify Third Party Verification Process

Approved by HUD: FYE2010

Implemented by HACSM: 7/1/2009

Description of the activity

In FY2010, HACSM received HUD approval to simplify the third-party verification process associated with earned income, asset income, and medical and child care expenses, in an effort to relieve administrative burdens, increase productivity, and ease the intrusive nature of the process for HCV applicants and participants.

The streamlining activities included the following:

- Increase asset values requiring third-party verification
Effective July 1, 2009, HACSM increased the threshold at which assets require third-party verification from \$5,000 to \$50,000 for the HCV programs. In place of third-party verification, the family is required to provide a current statement from the financial institution(s) showing the balance of the asset account(s). All assets valued over \$50,000 continue to require third-party verification.
- Streamline verification of eligible medical expenses
Effective July 1, 2009 HACSM instituted a policy in which eligible families, who claim medical expenses, are required to sign a self-certification and provide supporting documents from credible and established sources, such as receipts from medical care providers or pharmacy statements as proof of the claimed expenses.
- Streamline the verification process for eligible child care expenses
Effective July 1, 2009 HACSM instituted a streamlined verification process to reduce the challenges in verifying claimed child care expenses. Eligible families who claim child care expenses are now required to sign a self-certification and provide supporting documents from credible and established sources, such as day care invoices, receipts or written statements from the child care provider as proof of the claimed expense. Expenses incurred from an adult member of the household who provides child care or the absent parent who does not reside in the subsidized unit, are not acceptable.
- Extend the verification timeline to 120 days
Effective July 1, 2009, HACSM implemented a revised timeline for verification documentation to 120 days for HCV applicants and participants. This new timeline reduces duplication of work and accelerates an applicant's admission to the program and a participant's recertification for continuing program eligibility.

HACSM continues to use the Enterprise Income Verification (EIV) system for verification of participant identity, wage and assistance benefits.

Impact of the activity

This activity has continued to support the HACSM MTW program and has been successful in creating efficiencies that provide the avenues for staff resources to be allocated to self-sufficiency activities.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE #1: Agency Cost Savings					
Total cost to complete the task	In FY09, the total cost to complete this task was \$29,285	\$15,000 annually	In FY15, the total cost to complete this task was \$7,150	Benchmark Achieved	N/A
CE #2: Staff Time Savings					
Total time to complete the task in staff hours	On average, HACSM staff spent 738 hours annually to process third-party verifications (est. FYE2009)	HACSM expects an average of no more than 369 hours per year for staff to process third-party verifications	In FY15, HACSM spent an average of 119 hours to process third-party verifications	Benchmark Achieved	N/A
CE #3: Decrease in Error Rate of Task Execution					
Average error rate in completing the task as a percentage	Average error rate of task prior to implementation	Expected average error rate of task after implementation: 10%	The average error rate in FY15 was approximately 15%	Benchmark not achieved	HACSM did not track this metric prior to implementation of the Standard Metrics so can only report back on the percentage of errors in each reporting period. Because the error rate of this task is above the HACSM proposed benchmark, additional staff instruction and training has been implemented.
CE #5: Increase in Agency Rental Revenue					
Rental revenue in dollars	Rental revenue prior to implementation	Expected rental revenue after implementation	The agencies rental revenue was \$1,777,306	N/A	N/A

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2010-9: Tiered Subsidy Tables (TST)

Approved by HUD: FYE2010

Implemented by HACSM: 3/1//2010

Description of the activity

The TST, a subsidy table representing the first of its kind in the nation, gives HACSM the ability to inform the participant of the maximum dollar amount that HACSM will contribute to their housing costs *at the time* of voucher issuance. This is a 180° change from the standard HCV rules that cannot determine the participant’s subsidy portion until after a potential unit is secured and the contract rent and utility responsibilities are negotiated with the landlord/owner.

While other housing authorities have established rent tables that inform a participant of their rent portion based on eligible bedroom size, HACSM’s TST gives participants the ability to search for available units with the knowledge of exactly how much HACSM will contribute to their housing costs throughout San Mateo County, make personal decisions as to how much of their income they are comfortable contributing towards their housing costs, and practice in negotiating with owners through the leasing process. The HACSM intention through this program change is to empower the participants to take personal responsibility for their lives, starting with their housing decisions.

Impact of the activity

In FY15 the TST has continued to result in greater flexibility for families and a simpler rent calculation method for staff. Because of the on-going high rents in San Mateo County, HACSM has continued to closely monitor the subsidies provided by the TST and resulting tenant rent burden. HACSM is currently reviewing an increase in the subsidy amounts of the TST to reflect the current, extremely competitive rental market in San Mateo County. HACSM has not received any hardship requests in relation to the TST rent reform program.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE #1: Agency Cost Savings					
Total cost to complete the task	In FY14, cost of task prior to implementation: \$81,000	Expected cost of task after implementation: \$81,000	In FY15, the cost to complete this task was \$74,474	Benchmark achieved	As discussed in the FY14 Report, HACSM did not separate the time or cost for this specific task in the recertification process, and thus is not able to provide a baseline prior to implementation. In FY14, HACSM proposed to use \$81,000 as the baseline and benchmark in future reports.

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE#2: Staff Time Savings					
Total time to complete task in staff hours	In FY14, this task required 1,550 staff hours	Expected staff time required to complete this task, 1,550 hours	In FY15, the staff time to complete this task was: 1,430 hours	Benchmark achieved	N/A
CE #3: Decrease in Error Rate of Task Execution					
Average error rate in completing the task as a percentage	Average error rate of task prior to implementation	Expected average error rate of task after implementation: 10%	Approximately 4% of files failed file review.	Benchmark achieved	Upon review, the incorrect subsidy amounts were not due to rent reform, TST schedule, but rather to errors made in the calculation of income, child support, and changes in general assistance. In each case, HACSM staff received further instruction regarding the specific errors.
CE #5: Increase in Agency Rental Revenue					
Rental revenue in dollars	Rental revenue prior to implementation	Expected rental revenue after implementation: \$1,638,019	Actual rental revenue after implementation: 1,777,306	N/A	This activity was designed to be cost neutral for both the Housing Authority as well as the program participants, thus HACSM has not experienced an increase in rental revenue as a result of implementation.
SS #1: Increase in Household Income					
Average earned income of households (\$)	In FY13 the average earned income per household was \$25, 566	\$256 per year (a 1% increase)	In FY15, the average earned income per household was \$20,773, a \$5,203 decrease	Benchmark not achieved	HACSM has reviewed this result and determined that part of this decrease is due to the normal cyclical nature of the time limited program. Those who graduated, did so with higher wages, savings, and the ability to earn more income. On the other side of the equation, there has been an increase in new households who are just beginning their self-sufficiency journey and have lower wage jobs and who are working on addressing their personal barriers that currently prevent earning higher annual income.
SS #3: Increase in Positive Outcomes in Employment Status (Based on Head of Household Information)					
Other: Employment	Number of HOH employed	Expected number of HOH	Actual number of HOH employed	Benchmark	Prior to implementation of the Standard Metrics

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
		employed after implementation: 1,300	after implementation: 1543	achieved	HACSM did not collect this information and thus is unable to provide a baseline prior to implementation. In FY15, HACSM developed data tracking methods for this activity. HACSM is establishing the benchmarks for this metric with the submission of this Report (FY15).
	Percentage of total work-able households employed	Expected percentage of total work-able households employed after implementation: 50%	Actual percentage of total work-able households employed after implementation: 58%	Benchmark achieved	
Unemployed	Number of HOH unemployed	Expected number of HOH unemployed after implementation: 400	Actual number of HOH unemployed after implementation: 341	Benchmark achieved	
	Percentage of total work-able households who are unemployed	Expected percentage of total work-able households who are unemployed after implementation: 15%	Actual percentage of total work-able households who are unemployed full time after implementation: 11%	Benchmark achieved	
SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)					
Number of households receiving TANF assistance	Number of families receiving TANF at program entry	Expected average of households receiving TANF after implementation: 400	Actual number of households receiving TANF after implementation: 307	Benchmark achieved	Prior to implementation of the Standard Metrics HACSM did not collect this information and thus is unable to provide a baseline prior to implementation. HACSM is establishing the benchmark for this metric with the submission of this Report (FY15).
SS#8: Households Transitioned to Self-Sufficiency *					
Number of households transitioned to self-sufficiency	HACSM is unable to determine the number of households transitioned to self-sufficiency prior to implementation, however, in FY13, 11 households left the program due to "Zero HAP" status	HACSM expects 2 households will transition to self-sufficiency after implementation	In FY15, 19 households transitioned to self-sufficiency.	Benchmark achieved	N/A

* The HACSM definition of Self-Sufficiency includes the following:

- The household has reached an income level such that HACSM is no longer providing subsidy on behalf of the family for a period of 90 days, or
- The household has reached the end of the voucher's time limit and will be graduating from the FSS program, with escrow payout.

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2010-10: Simplify HQS Process

Approved by HUD: FYE2010

Implemented by HACSM: 7/1/2009

Description of the activity

HACSM is allowed to inspect HACSM-owned properties to determine HQS compliance. HACSM not required to submit inspection reports for HACSM-owned or affiliated properties to the HUD Field Office

Impact of the activity

This activity has continued to be effective in supporting the HACSM goal of increased administrative efficiency.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE #1: Agency Cost Savings					
Total cost of task in dollars	In FYE09, HACSM had an annual direct cost of \$1,500 to hire outside consultants to inspect HACSM-owned properties	HACSM expects that this task will cost no more than \$6,000 annually, after implementation	In FY15, the cost to conduct these inspections was \$1,612	Benchmark Achieved	N/A
CE #2: Staff Time Savings					
Total time to complete the task in staff hours	In FYE10, the total staff time per inspection: 60 hours	Expected amount of total staff time to complete the task: 112 hours	In FYE15, 58 hours were required to complete HQS inspections at HACSM-owned properties.	Benchmark Achieved	N/A
CE #3: Decrease in Error Rate of Task Execution					
Average error rate in completing the task as a percentage	In FY14, the average error rate was 28%	Average error rate in completing the task: 10%	Average error rate in completing HQS inspections was 0%	Benchmark Achieved	N/A

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2010-11: Eliminate Competitive Process for Allocation of PBV to Former Public Housing

Approved by HUD: FYE2010

Implemented by HACSM: 1/27/2011

Description of the activity

In FY2011, HACSM received HUD approval to allocate project-based vouchers to its former public housing units without the use of a competitive process. In FY14, HACSM received HUD approval to expand the scope of this activity to include other housing units owned by HACSM or HACSM affiliates such as the redeveloped Half Moon Village.

Impact of the activity

HACSM did not have any Public Housing or other HACSM owned or affiliated properties that converted to PBV in FY15.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE #1: Agency Cost Savings					
Total cost to complete the task	Cost of task prior to implementation was \$3314.40	Expected cost of task after implementation: \$4,000	N/A	N/A	N/A
CE #2: Staff Time Savings					
Total time to complete task in staff time	40 hours	HACSM expects that it will take 20 hours to complete this task	N/A	N/A	N/A

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2010-12: Waive 12 Month Stay Requirement for Residents in Formerly Public Housing Units Converted to PBV

Approved by HUD: FYE2010

Implemented by HACSM: 5/1/2011

Description of the activity

With this activity, HACSM has the authority to offer residents of public housing units undergoing disposition from public housing status, the option to relocate immediately or any time thereafter, using a tenant transfer voucher. With the approval of HACSM’s demo/dispo application, existing public housing residents at the time of disposition are not required to stay in their unit for 12 months after conversion to PBV assistance. Instead, former public housing residents have the choice to determine if and when they want to move.

Impact of the activity

There are no updates on this activity as the first Public Housing complex, Midway Village, completed its Demo/Dispo process in FYE12. In FY15, HACSM received its Commitment to enter into a HAP (CHAP) from HUD for El Camino Village and has been working with HUD regarding converting the property from Public Housing to a RAD-Project Based complex.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
HC#5: Increase in Resident Mobility					
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity	In FY10, (0) households able to move to a better unit/or neighborhood of opportunity	HACSM expects that two (2) households are able to move to a better unit and/or neighborhood of opportunity after implementation	N/A	N/A	N/A
HC#7 Household Assisted by Services that Increase Housing Choice					
Number of households receiving services aimed to increase housing choice	In FY10, (0) households were receiving this type of service	HACSM expects that 2 households will receive these services after implementation	N/A	N/A	N/A

Housing Authority of the County of San Mateo

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2010-13: Accept Lower HAP by Modifying PBV Rules for In-place Residents at former Public Housing Developments

Approved by HUD: FYE2010

Implemented by HACSM: 5/1/2011

Description of the activity

At the time of disposition, if a public housing resident is residing in an oversized unit and HACSM does not have the proper size unit available for the resident to relocate, HACSM will accept a lower HAP based on the unit size the resident qualifies for and not the actual unit size occupied. However, as is the current policy, as units of the appropriate size become available at the subject project-based property, the over-housed resident will be required to move into the newly available unit.

Impact of the activity

There are no new updates for this activity. As reported in FY12, the dispo application for Midway Village was approved and the conversion completed. In FY15, HACSM received its Commitment to enter into a HAP (CHAP) from HUD for El Camino Village and has been working with HUD regarding converting the property from Public Housing to a RAD-Project Based complex.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
HC#4: Displacement Prevented					
Number of households at or below 80% AMI that would lose assistance or need to move (decrease).	In FY14, there are seven (7) households at or below 80% AMI at El Camino Village who are over-housed and that would lose assistance or need to move	HACSM expects that no more than 5 households at or below 80% AMI would lose assistance or need to move (decrease).	N/A	N/A	N/A

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2010.14: Establish Flat or Market Rate Policy for Over-income Public Housing Residents at Conversion of Public Housing Units to Project-Based Units

Approved by HUD: FYE2010

Implemented by HACSM: 5/1/2011

Description of the activity

Permits residents of public housing undergoing the disposition process that are not eligible to receive a voucher due their household income which exceeds the income limitations of the voucher program to have the option to remain in the unit (for a maximum of 12 months) at the higher of the flat rate or market rate for the unit. Additionally, should the former resident’s income level in the subsequent six months (after vacating the public housing development) decrease to a level that they would be income eligible, they will be allowed to re-apply to the project based wait list with a preference. At such time as the resident vacated the unit, the unit would convert to a standard project-based unit.

Impact of the activity

There are no new updates for this activity. As reported in FY12, the dispo application for Midway Village was approved and the conversion completed. In FY15, HACSM received its Commitment to enter into a HAP (CHAP) from HUD for El Camino Village and has been working with HUD regarding converting the property from Public Housing to a RAD-Project Based complex.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
SS #1: Increase in Household Income					
Average earned income of households (\$)	Averaged earned income of households at El Camino Village equal: \$23,410	Expected averaged earned income of households affected by this policy prior to implementation (\$)	N/A	N/A	N/A
SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)					
Number of households receiving TANF assistance	FY14, five (5) households were receiving TANF	Expected number of households receiving TANF after implementation: Five (5) households	N/A	N/A	N/A
SS #6: Reducing Per Unit Subsidy Costs for Participating Households					
Average amount of	FY14, the average Section	Expected average subsidy	N/A	TBD	N/A

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
Section 9 subsidy per household (\$)	9 subsidy per household: \$1,309	per household after implementation: \$1,309			
SS #7: Increase in Agency Rental Revenue					
PHA rental revenue (\$)	FY14, PHA rental revenue \$239,052	Expected PHA rental revenue after implementation \$239,052	N/A	TBD	N/A
SS #8: Households Transitioned to Self-Sufficiency *					
Number of households transitioned to self-sufficiency	Zero (0) households transitioned to self-sufficiency prior to implementation	HACSM does not expect this activity to impact a households self-sufficiency, therefore the expected number of households transitioned to self-sufficiency after implementation to be 1 household	N/A	TBD	N/A

* The HACSM definition of Self-Sufficiency for this activity includes the following:

- The household has reached an income level such that HACSM is no longer providing subsidy on behalf of the family for a period of 12 months.

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2011-15: Institute Biennial Inspection Schedule for Units Under Contract

Approved by HUD: FYE2011

Implemented by HACSM: 7/1/2010

Description of the activity

All HCV units are inspected on a biennial schedule. HACSM continues to conduct any complaint inspections. The units must at all times meet Housing Quality Standards while under contract

Impact of the activity

The biennial inspection schedule has continued to support the HACSM goal of greater administrative efficiency. It has also provided HACSM staff the time savings to redirect toward assisting participants to secure housing, facilitating the lease up process between the participants and landlords and finally to conduct owner outreach, which is absolutely vital in San Mateo County at this time. In FY15, the HACSM leasing team hosted two landlord workshops that were attended by over 67 property owners, landlords, and rental management professionals. The team also developed quarterly newsletters that were mailed to owners along with the HAP statements. The newsletters included program information that addressed frequently asked questions and/or potential emerging issues.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE#1: Agency Cost Savings					
Total cost of task in dollars	On average the cost to complete HQS inspections prior to implementation: \$195,046	HACSM expects that it will cost no more than \$100,000 (annually) to complete HQS inspections	Actual cost to conduct HQS inspections: \$55,976	Benchmark Achieved	N/A
CE#2: Staff Time Savings					
Total time to complete task in staff hours	On average, it required 4,157 hours annually to complete the annual HQS inspections prior to implementation	HACSM expects that will require 2,161 hours to complete HQS inspections on an annual basis	Actual amount of total staff time dedicated to complete HQS inspections: 1,952 hours	Benchmark Achieved	N/A
CE #3: Decrease in Error Rate of Task Execution					
Average error rate in completing the task as a percentage	HACSM is establishing this baseline with the FY13. The error rate was 44%	Average error rate: 25%	Average error rate in HQS inspections was 4%	Benchmark Achieved	N/A

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2011-16: Expand the Section 8 Project-Based Voucher Program

Approved by HUD: FYE2011

Implemented by HACSM: 5/23/2011

Description of the activity

Effective July 1, 2010 HACSM received HUD approval to increase its voucher budget authority to 30% for the Project-Based program. Expansion of the PBV program is one of the major resources for the development of additional affordable housing units and will assist the San Mateo County to meet the goals of its HOPE Plan, the County's 10 year plan to end homelessness.

In selecting future Project-Based projects, HACSM has acknowledged that it will give preference to properties that are newly constructed, located near public transportation corridors, and contain energy efficient features. This activity provides an avenue to increase housing choice for families by increasing the supply of decent, safe, and sanitary affordable housing.

By diversifying the use of our finite number of vouchers, this initiative will provide a wider variety in type and location of housing for our participants, present and future.

Impact of the activity

In FY14, HACSM adopted policies to support the original activity proposal that requires participating families to stay at least 24 months in a PBV unit before they are eligible to move with continued assistance; and, that any continued assistance would be a part of the MTW/FSS program, the five year, time-limited program. If there is a need for additional housing assistance at the end of the term of participation, the family could apply for a "hardship" at that time.

As of June 30, 2015, HACSM has project based 24% of its HCV portfolio. During FY15, the following projects received PBV commitments:

- 1) Ocean View Senior Apartments, an existing 100-unit affordable apartment building located in Pacifica, CA. The residential property serves low-income seniors and HACSM has committed 31 vouchers.
- 2) Sequoia Belle Haven, a 90-unit affordable new construction senior development located in Menlo Park, CA. All units, once developed, will be deemed affordable with 69 units covered by Project-Based Vouchers.
- 3) University Avenue Senior housing, a 41-unit affordable new construction senior development located in E. Palo Alto, CA. With the exception of the manager unit, all units will be covered by Project-Based Vouchers.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE #1: Agency Cost Savings					
Total cost of task in dollars	Cost of task prior to implementation (\$)	Expected cost of task after implementation (\$)	Actual cost of task after implementation of the activity (\$)	N/A	When originally implemented, HACSM did not consider this to be an activity that would lead to agency cost savings. As such, HACSM did not measure this type of baseline, nor did it establish a cost savings benchmark.
CE #2: Staff Time Savings					
Total time to complete task in staff hours	Total amount of staff time dedicated to the task prior to implementation (hours)	Expected amount of total staff time to complete the task after implementation (hours)	Actual amount of total staff time dedicated to the task after implementation of the activity (hours)	N/A	HACSM has not realized staff time savings as a result of this MTW activity.
HC #4: Displacement Prevention					
Number of households at or below 80% AMI that would lose assistance or need to move (decrease). If the units reach a specific type of household, HACSM will give that type here.	There were zero (0) households losing assistance/moving prior to implementation of the activity	Zero (0) households are expected to lose assistance or be required to move after implementation	In FY15, Zero (0) households have lost their housing assistance or been required to move implementation	Benchmark achieved	N/A

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2011-17: Revise Eligibility Standards

Approved by HUD: FYE2011

Implemented by HACSM: 7/1/2010

Description of the activity

HACSM implemented an asset value limit for all new applicants and participants. The HACSM policy includes the following criteria: 1) If an applicant has assets exceeding \$100,000, or a present ownership interest in a suitable home in which they have a legal right to reside, they are determined to be ineligible for the program, 2) If a participant experiences an increase in assets, such that their assets are currently valued at more than \$100,000, or has (since their last reexamination) gained ownership interest in real property in which the participant has a legal right to reside, the participant would be determined ineligible for continued assistance. This determination is made through the recertification process, annually or biennially, based on the household’s regular recertification schedule.

Impact of the activity

This activity has continued to provide HACSM with an efficient tool to reach the most needy households in our community. In January 2014, HACSM opened its MTW Waitlist for the 1st time since July 2008. In FY15, approximately 14,201 households had submitted a pre-application and HACSM randomly selected 1,400 for the waitlist and subsequent initial eligibility determinations. In FY15, only two households were determined ineligible due to the asset value limits.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
HC #3: Decrease in Wait List Time					
Average applicant time on wait list in months	Average applicant time on wait list prior to implementation was 36 months	Expected average applicant time on wait list after implementation will be 36 months	In FY14, the average applicant time on wait list was approximately 2 months	Benchmark Achieved	N/A

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2011-18: Eliminate 100% Excluded Income from the Income Calculation Process

Approved by HUD: FYE2011

Implemented by HACSM: 7/1/2010

Description of the activity

Effective July 1, 2010, HACSM no longer verifies, counts, or reports income that HUD specifies as 100% excluded from the income calculation process. Examples of 100% excluded income are food stamps and the earned income from minors. HUD regulation 24 CFR 5.609 (c) provides a complete list of all income sources that HUD specifies to be excluded when calculating a family’s annual income. Because this income is excluded from the income calculation process, it does not affect the amount of a family’s rental assistance.

Impact of the activity

This activity has continued to support the HACSM efforts for administrative streamlining and cost effectiveness in the MTW program.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE#1 Agency Cost Savings					
Total cost of task in dollars	In FY10, HACSM spent approximately \$7,400 annually on this task prior to implementation	HACSM expects that this task will cost no more than \$1,825 annually after implementation	In FY15, the cost of this activity was \$1,610	Benchmark achieved	N/A
CE#2 Staff Time Savings					
Total time to complete the task in staff hours	In FY10, the total amount of staff time required to complete the task prior to implementation: 60 hours	Expected amount of total staff time to complete the task after implementation: 30 hours	In FY15, the actual staff time to complete the task: 30 hours	Benchmark achieved	N/A
CE #3: Decrease in Error Rate of Task Execution					
Average error rate in completing the task as a percentage	Average error rate in completing the task as a percentage	Average error rate in completing the task as a percentage: 0%	Average error rate in completing the task as a percentage: 0%	Benchmark achieved	As reported in FY14, HACSM is unable to provide a baseline for this metric, as this date was not collected prior to implementation of the activity. Also, due to the fact that staff do

					not collect, verify, or include in the calculation of the household annual adjusted income, the on-going error rate is 0%.
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Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2011-19: Eliminate the Requirement to Complete New HAP Contract with Utility Responsibility Changes

Approved by HUD: FYE2011

Implemented by HACSM: 7/1/2010

Description of the activity

CFR 982.308 (g) (2) (i) requires PHAs to execute a new HAP contract with the owner if there are any changes in lease requirements governing tenant or owner responsibilities for utilities or appliances. Effective July 1, 2010, HACSM received HUD approval to eliminate the requirement of executing a new HAP contract with the owner in such instances as described above. Instead, upon receipt of a written notification from the tenant or the owner detailing the changes, HACSM will review the contract rent to ensure its rent reasonableness, adjust the tenant portion of rent and HAP payment if applicable, and confirm the changes by issuing a rent change notice.

Impact of the activity

Due to the fact that this activity only applies to participants who have a HAP contract in place prior to July 1, 2010 and who do not relocate, this activity continues to see minimal, or no activity. However, in instances when it does apply, this activity is very helpful in maintaining the HACSM goal of administrative streamlining. In FY15, there were seven (7) cases where the owner requested a change in the utility responsibilities for their assisted unit.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE#1 Agency Cost Savings					
Total cost of task in dollars	Est. FY2010, HACSM spent \$1,339 annually to complete this task prior to implementation of the activity	The expected cost of task after implementation of the activity is \$275	In FY15 the cost to complete this task was \$203	Benchmark Achieved	N/A
CE#2 Staff Time Savings					
Total time to complete the task in staff hours	In FY10, 34 hours were required to complete this task	HACSM expects that it will require six (6) hours to complete this task after implementation	In FY15 it required 5.25 hours to complete this task	Benchmark Achieved	N/A

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2012-21: Change Qualifications for Full-Time Student Status

Approved by HUD: FYE2012

Implemented by HACSM: 7/1/2011

Description of the activity

In order for a family member, other than the head, co-head, or spouse to qualify for the FTS status, dependent deduction and income exclusion, the family member must be less than 24 years old, a FTS at an accredited institution, and must provide a transcript of the full-time student status at all subsequent recertification appointments.

Impact of the activity

HACSM has continued to find this activity a key support in encouraging High School graduates to continue on with their college courses immediately thereafter.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE #5: Increase in Agency Rental Revenue					
Rental Revenue in dollars	FY11 the rental revenue prior to implementation: \$0	Expected rental revenue after implementation of the activity: \$453,738	N/A	Benchmark Achieved in FY13	In FY15, HACSM has been working on a data tracking method for this activity as previously the agency was unable to track the FTS status of household members 24 years old and older within its database management system. The tracking method was in its initial implementation stage during FY15 and thus the data is not yet available at the time of this report.

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2012-22: Include Foster Care, KinGap, and Adoption Assistance Payments in Annual Income Calculation

Approved by HUD: FYE2012

Implemented by HACSM: 7/1/2011

Description of the activity

HACSM includes foster care, Kin Gap, and adoption assistance payments in the determination of annual adjusted income. To help offset this inclusion of this income, HACSM provides a dependent allowance for foster children, disabled foster adults, and adopted children

Impact of the activity

In FY15, HACSM did not receive any hardship requests as a result of this activity and current participants continue to support foster children and foster adults in San Mateo County.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE #5: Increase in Agency Rental Revenue					
Rental Revenue in dollars	Rental revenue prior to implementation of the activity: \$0	Expected rental revenue after implementation: \$96,000	N/A	Benchmark Achieved	In FY15, HACSM has been working on a data tracking method for this activity as previously the agency was unable to track the inclusion of this income within its database management system. The tracking method was in its initial implementation stage during FY15 and thus the data is not yet available at the time of this report.

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2012-23: Modify Head of Household (HOH) Changes Policy

Approved by HUD: FYE2012

Implemented by HACSM: 7/1/2011

Description of the activity

In order to encourage families towards self-sufficiency and reach more eligible households on the HCV waitlist, HACSM implemented the following policies regarding the activities for head of household change requests. The

HACSM policies include the following:

- The individual becoming the new HOH must be in the household for at least the previous 12 consecutive months, and
- At the time of the HOH change, the household would join the time-limited MTW Self-Sufficiency program (MTW On-going Activity #1). However, if household is already enrolled in the time-limited MTW Self-Sufficiency program, the remaining household members would only be eligible for the remaining term, not an additional term.

Impact of the activity

In FY15, no households transitioned to the MTW 5-year Self-Sufficiency program, through a change in HOH.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
HC #3: Decrease in Wait List Time					
Average applicant time on wait list in months	Average applicant time on wait list prior to implementation was 36 months	Expected average applicant time on wait list after implementation will be 36 months	In FY15, the actual average applicant time on wait list was 1.2 months	Benchmark Achieved	N/A

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2012-24: Change Automatic Termination of HAP Contact from 180 to 90 Days

Approved by HUD: FYE2012

Implemented by HACSM: 7/1/2011

Description of the activity

HACSM reduced the number of days that a participant can remain on the program, while paying 100% of their rent, from 180 to 90 consecutive days.

Impact of the activity

HACSM continues to monitor this activity and the households who reach “zero” HAP status. In FY15, while some households were able to graduate from the program as a result of reaching an income level such that they no longer needed the housing assistance, others did experience changes that resulted in the need for on-going housing assistance within the 90-day timeline. During this fiscal year, 26 households reached a “zero HAP” status, 19 households exited the program, and 7 experienced a change in household income and as a result remain on the program.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
HC #3: Decrease in Wait List Time					
Average applicant time on wait list in months	Average applicant time on wait list prior to implementation was 36 months	Expected average applicant time on wait list after implementation will be 36 months	In FY15, the actual average applicant time on wait list was 1.2 months	Benchmark Achieved	N/A

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2012-25: Exclude Asset Income from Calculations for Households with assets under \$50,000

Approved by HUD: FYE2012

Implemented by HACSM: 7/1/2011

Description of the activity

HACSM has eliminated calculating or including income received from family assets valued less than \$50,000. Additionally, HACSM no longer reports the asset income valued less than \$50,000 to HUD through the HUD-50058.

Impact of the activity

With the implementation of the Standard Metrics reporting requirement, time and cost savings that HACSM had previously realized were significantly diminished due to the fact that in order to provide the required information, staff had to again collect and calculate the information that they would ultimately disregard. In FY15, the total gross assets for households with assets valued less than \$50,000 was \$1,895,998. When averaged, no household would have more than approximately \$1,440, far less than the \$50,000 threshold. When the average interest rate (currently .05%) is applied to the total gross asset value, each family would realize approximately \$.33 cents interest. This is far less than the cost to calculate and include in the annual adjusted income for the family.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE #1: Agency Cost Savings					
Cost of task in dollars	FY14, the total cost of staff time dedicated to this task was \$8,104	Expected cost of task to remain \$9,000	In FY15, the cost to complete this task was \$7,447	Benchmark achieved	N/A.
CE #2: Staff Time Savings					
Total time to complete the task in staff hours	FY14, the total amount of staff time dedicated to the task was 155 hours	Expected amount of total staff time dedicated to the task to remain 155 hours	In FY15, it required 143 hours to complete this task	Benchmark achieved	N/A
CE #3: Decrease in Error Rate of Task Execution					
Average error rate in completing a task as a percentage	Est. FY10, the average error rate of task prior to implementation of the activity was 9%	Expected average error rate of 5% for the task after implementation of the activity	Actual average error rate: 3%	Benchmark not achieved	N/A
CE #5: Increase In Rental Revenue					

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Rental Revenue in dollars	Rental revenue prior to implementation of the activity: \$0	Expected rental revenue after implementation of the activity: \$0	Actual rental revenue after implementation: \$0	Benchmark Achieved	HACSM is unable to report on this metric due to the fact that there is no impact to rental revenue as a result of the TST rent reform program.
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Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2012-26: Commitment of MTW Funds for Leveraging in the Creation of Additional Affordable Housing in San Mateo County

Approved by HUD: FYE2012

Implemented by HACSM: 10/26/2011

Description of the activity

HACSM originally committed up to \$4,000,000 of MTW funds for the development of additional affordable (low income, very low income and extremely low income) housing in San Mateo County. In the HACSM FY13 Annual Plan, HACSM received HUD approval to increase this commitment up to \$8,000,000 of MTW funds. The re-programmed funds are to be used to leverage additional investment funds that will be substantially larger than HACSM commitments. Development activities may include site acquisition, substantial rehabilitation of existing stock, and development of new units.

Impact of the activity

This activity has been essential to the development of new construction affordable housing units. Following up on FY14’s opening of Phase I of Half Moon Village (45 affordable senior units), FY15 saw the opening of Phase II (an additional 115 affordable senior units). Due to a very favorable tax credit market and low construction costs, the original financial commitments for Half Moon Village were able to be significantly reduced and the funding availability recycled and added into more recent NOFA’s. In FY15, two NOFA’s totaling \$8 million were issued to fund the development of 264 units at 7 developments in the next 2-3 years.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
HC#1: Additional Units of Housing Made Available					
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household, HACSM will provide that information here.	Est. FY11, Zero (0) housing units of this type prior to implementation of this activity.	HACSM expects the creation of at least 20 affordable units per \$1,000,000 invested	In FY 15, 115 senior housing units at Half Moon Village Phase II were made available after implementation of the activity	Benchmark Achieved	N/A
HC #2: Units of Housing Preserved					
Number of housing units preserved for households at	Housing units preserved prior to	Expected housing units preserved after	In FY15, 15 senior housing units were preserved after	Benchmark Achieved	Of the original 60 Half Moon Village units, 45 were replaced in FY14, and the remaining 15

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or below 80% AMI as a result of the activity.	implementation (0)	implementation 60	implementation		units were replaced in FY15.
CE #4: Increase in Resources Leveraged					
Amount of funds leveraged (\$)	\$0 leveraged prior to implementation (\$)	HACSM expects to leverage \$3 million dollars for every \$1 million dollars invested	In FY15, the total investment of \$3.2 million was leveraged by a total development cost of \$56.2 million (essentially 18:1)	Benchmark Achieved	N/A

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2011-27: Provider Based Program

Approved by HUD: FYE2012

Implemented by HACSM: 11/15/2011

Description of the activity

HACSM implemented a provider-based assistance program, outside the scope of the voucher program. The Provider-Based program was designed with the intention to reach populations in San Mateo County who were under-served or not served by the voucher program or other special-funded programs.

Impact of the activity

Currently, there are three provider-based assistance programs with program partners who work with the following underserved populations: 1) Survivors of domestic violence, 2) Recently released, non-violent parolees, and 3) Single parent households with minor children. The main focus of the program is to support the housing stability of these families. In some cases the housing assistance follows the “Transitional Housing” model with housing provided for a short period of time, up to 18 months. In other cases, the housing assistance is provided for a maximum of 36 months.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
HC#7: Households Assisted by Services that Increase Housing Choice					
Number of households receiving services aimed to increase housing choice (increase)	Est. FY11, Zero (0) households received this type of service prior to implementation of the activity.	HACSM expects that 30 households will receive these services after implementation of the activity.	55 households received these services in FY15	Benchmark Achieved	N/A
SS #1: Increase in Household Income					
Average earned income of households (\$)	Average earned income of households affected by this policy prior to implementation was \$0	HACSM expects the average earned income of households affected by this policy to be \$900	In FY15, the actual average earned income of households affected by this policy was \$1,032	Benchmark Achieved	N/A
SS #3: Increase in Positive Outcomes in Employment Status (Based on Head of Household Information)					
Other: Employment	Number of HOH employed was zero (0)	HACSM expects that 20 HOH will be employed after implementation	In FY15, 38 HOH were employed	Benchmark Achieved	N/A
	0% of total work-able	HACSM expects that 25%	In FY15, 73% of work able	Benchmark	N/A

	households were employed	of the total work-able households will be employed after implementation	households were employed	achieved	
Enrolled – Job Training	Zero (0) HOH enrolled in a job training program	15 HOH enrolled in job training program after implementation	Actual number of HOH enrolled in job training program: 52	Benchmark achieved	N/A
	0% of total work-able households enrolled in a job training program	HACSM expects that 25% of the total work-able households will be enrolled in a job training program after implementation	Actual percentage of total work-able households enrolled in a job training program: 100%	Benchmark achieved	N/A
SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)					
Number of households receiving TANF	Zero (0) households receiving TANF prior to implementation	HACSM expects that 20 households will be receiving TANF after implementation	Households were receiving TANF: 7	Benchmark achieved	N/A
SS #8: Households Transitioned to Self-Sufficiency *					
Number of households transitioned to self-sufficiency	Zero (0) households transitioned to self-sufficiency prior to implementation	** Expected number of households transitioned to self-sufficiency after implementation	** Actual number of households transitioned to self-sufficiency.	Unable to determine	**Participants in this program do not meet the HACSM definition of self-sufficiency therefore HACSM is unable to include this information in the MTW Report.

* The HACSM definition of Self-Sufficiency includes the following:

- The household has reached an income level such that HACSM is no longer providing subsidy on behalf of the family for a period of 90 days

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2013-28: Apply MTW Flexibilities to Public Housing

Approved by HUD: FYE2013

Implemented by HACSM: 7/1/2012

Description of the activity

In FY2013, HACSM received HUD approval to operate El Camino Village (ECV), a 30-unit Public Housing complex, in accordance with several of MTW policies and procedures used for the voucher program.

Following is a list of the areas that HACSM implemented July 1, 2012:

1. Biennial recertification schedule for all elderly and or disabled households.
2. Elimination of the Earned Income Disallowance (EID)
3. Revised Eligibility Standards
4. Exclusion of asset income for households with assets under \$50,000
5. Elimination of the imputed asset calculation and use of the actual interest earned for assets valued at or over \$50,000
6. Simplification of the Third Party Verification Process
7. Modification of the change in head of household policies
8. Biennial inspection schedule
9. Modification of the full-time student status requirements
10. Inclusion of Foster Care, KinGap, and Adoption Assistance payments in the households annual adjusted income, and allowance of a \$480 dependent deduction for each foster child and/or adult

Impact of the activity

This multi-faceted activity has assisted the HACSM goal of increased administrative streamlining. As a result of the activity, HACSM staff were able to apply the same rules and policies to all program participants resulting in increased customer service and a more timely response to participant and resident needs.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE #1: Agency Cost Savings					
Total cost of task in dollars	The cost to complete this activity: \$2,401	Expected cost of task \$2,161	FY15, the cost to complete this activity: \$1,354	Benchmark Achieved	N/A
CE #2: Staff Time Savings					

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Total time to complete the task in staff hours	Total amount of staff time dedicated to the task 42 hours	Expected amount of the total staff time dedicated to the task after implementation: 38 hours	Actual amount of total staff time dedicated to the task 24 hours	Benchmark Achieved	N/A
CE #3: Decrease in Error Rate of Task Execution					
Average error rate in completing the task as a percentage	Average error rate in completing the task as a percentage	Average error rate in completing the task: 10%	N/A	N/A	As discussed in FY14, HACSM had not tracked this measurement prior to implementation of the activity in FY13. While HACSM has now included these 30 units of Public Housing in its on-going QA file reviews, none were randomly selected in FY15. HACSM is implemented a benchmark of no more than a 10% error rate with submission of this Report.
SS #1: Increase in Household Income					
Average earned income of households (\$)	FY13 the average earned income of households: \$26,062	Expected average earned income of households affected by this policy	Actual average earned income: \$31,179	Benchmark achieved	N/A
SS #2: Increase in Household Savings					
Average savings of households (\$)	Average savings per household prior to implementation	Expected savings per household affected by this policy	Actual average savings per household: \$1,811	Benchmark achieved	N/A
SS #3: Increase in Positive Outcomes in Employment Status (Based on Head of Household Information)					
Other: Employment	Number of HOH employed: 22	Expected number of HOH employed: 22	Actual number of HOH employed after implementation: 16	Benchmark achieved	N/A
	Percentage of total work-able households employed: 81%	Expected percentage of total work-able households employed after implementation: 80%	Actual percentage of total work-able households employed: 94%	Benchmark achieved	N/A
Unemployed	Number of HOH unemployed: 2	Expected number of HOH unemployed after implementation: 2	Actual number of HOH unemployed: 14	Benchmark achieved	N/A
	Percentage of total work-able households who are unemployed: 8%	Expected percentage of total work-able households who are unemployed after implementation: 5%	Actual percentage of total work-able households who are unemployed full time: 1%	Benchmark achieved	N/A

SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)					
Number of households receiving TANF	Households receiving TANF prior to implementation: 5	Expected number of households receiving TANF after implementation: 5	Actual number of households receiving TANF: 4 Households	Benchmark achieved	N/A
SS #5: Households Assisted by Services that Increase Self-Sufficiency					
Number of households receiving services aimed to increase self sufficiency	Households receiving self sufficiency services prior to implementation	Expected number of households receiving services after implementation	Actual number of households receiving self sufficiency services: 0	Benchmark achieved	N/A
SS #6: Reducing Per Unit Subsidy Costs for Participating Households					
Average amount of Section 8 /Section 9 subsidy per household affected by this policy	Average subsidy per household affected by this policy prior to implementation: \$1,123	Expected average subsidy per household affected by this policy after implementation: \$1,123	Actual average subsidy per household: \$1,123	Benchmark achieved	N/A
SS #7: Increase in Agency Rental Revenue					
PHA rental revenue (\$)	PHA rental revenue prior to implementation \$239,052	Expected PHA rental revenue after implementation: \$239,052	Actual PHA rental revenue: \$233,528	Benchmark achieved	N/A
SS #8: Households Transitioned to Self-Sufficiency					
Number of households transitioned to self-sufficiency	Number of households transitioned to self-sufficiency prior to implementation	Expected number of households transitioned to self-sufficiency after implementation	Actual number of households transitioned to self-sufficiency: 0	N/A	Based on the HACSM definition of self-sufficiency, the residents at El Camino Village will likely never qualify as transitioned to self-sufficiency. Instead of exiting the program, must choose to remain in place and pay the "Flat Rent" amount for the unit.

* The HACSM definition of Self-Sufficiency includes the following:

- The household has reached an income level such that HACSM is no longer providing subsidy on behalf of the family for a period of 90 days

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2014-29: Revise Child Care Expense Deduction

Approved by HUD: FYE2014

Implemented by HACSM: 7/1/2013

Description of the activity

In conjunction with HUD regulations, HACSM defines child care expenses as amounts anticipated to be paid by the family for the care of children 12 years of age and under during the period for which annual income is computed, but only where such care is necessary to enable a family member to work, seek work, or go to school (furthering education) and only to the extent such amounts are not reimbursed. The activity applies to HACSM’s Public Housing and Section 8 Housing Choice Voucher programs.

The amount deducted shall reflect reasonable charges for child care. When a family member looks for work or furthers his or her education, there is no cap on the amount that may be deducted for child care – although the care costs must still be necessary and reasonable. However, when child care enables a family member to work, the deduction is capped by the amount of employment income that is included in annual income.

HACSM defines allowable child care deductions as follows:

1. The care must be provided for one or more qualifying persons. A qualifying person is a person who is a dependent child, age 12 and under, of a family member who is the parent or legal guardian of the child.
2. The care must be provided to enable the parent or guardian to work, seek work, or attend school full time.
3. The payments for care cannot be paid to the non-custodian parent(s) of the qualifying child.
4. The maximum allowable child care deduction is the lesser of the actual expense or 50% of the gross earnings or net earnings from self-employment of the parent or guardian.
5. If both parents are in the subsidized household, the 50% gross earnings cap will be based on the lower of the two earnings from the parents. One parent may be considered as having earnings if the parent is a full-time student or a person with disabilities that inhibits the parent to care for the child. In this case, the earnings will be based on the working parent.
6. The maximum allowable child care deduction for a parent or guardian who has no earnings but attends school full time will be the lesser of the actual expense paid or \$5000 per year per qualifying child.

Impact of the activity

In FY15, HACSM found that this activity helped to clarify the process for child care expenses resulting in some staff time savings and at the same time provided clarity and greater equity for all program participants. Also, HACSM clarified the policy related to child care expense allowed under “seeking employment.” In such cases, HACSM will allow the **lesser** of \$5,000 or the actual expense paid per year per qualifying child for a parent or guardian who lost his/her employment and is seeking work. The eligible period for such deduction expires 12 months from the date of loss of employment.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE #5: Increase In Rental Revenue					
Rental Revenue in dollars	HACSM rental revenue FY13, prior to implementation of the activity, was \$1,653,740	HACSM expected the rental revenue after implementation of the activity to remain constant at approximately \$1,650,000	HACSM rental revenue in FY15, after implementation, was \$1,777,306	Benchmark achieved	N/A

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2015-30: Standard Proration for Ineligible Household Members

Approved by HUD: FYE2015

Implemented by HACSM: 10/1/2014

Description of the activity

In FY15, HACSM implemented a standard pro-ration of \$150 per ineligible household member that is subtracted from the total monthly HACSM HAP subsidy for the household. Implementing this activity allowed HACSM to meet the HUD regulation which required that the PHA prorate the HAP portion of the household’s subsidy for the eligible household members, while at the same time assisting participants and applicants understand the calculation method for their rent portion and easing the barriers that mixed families were facing in finding and rental an affordable housing unit.

Impact of the activity

Upon implementation of this activity, HACSM staff saw that there were fewer challenges in managing the program for families that included members who were ineligible due to their citizenship status. Also, “mixed families” experienced some relief in the lease up process. Since implementation, HACSM has not received any hardship requests from participants in relation to this MTW activity. HACSM expected that nine families could experience an increase in their rent portion however, due to a combination of owner requested contract rent increases coupled with increases in the TST subsidy schedule, none of the nine households requested any hardship relief for increases in their rent portion as a result of this activity. Almost all mixed families saw a decrease in their rent portion, thus assisting low income families secure affordable units in San Mateo County and move from homelessness to stable housing.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE #1: Agency Cost Savings					
Total cost of task in dollars	In FY14, the total cost to complete this task was \$8,674	HACSM expects that the cost to complete this task: \$4,400	In FY15, the cost to complete this task was \$4,000	Benchmark achieved	N/A
CE #2: Staff Time Savings					
Total time to complete the task in staff hours	In FY14, the total time to complete this task prior to implementation: 166 hours	HACSM expects that it will take half the time to complete this task after implementation: 83 hours	In FY15 the time to complete this task was 77 hours	Benchmark achieved	N/A
CE #3: Decrease in Error Rate of Task Execution					
Average error rate in completing the	Average error rate in completing the task as a	HACSM is establishing this benchmark with the	Average error rate in completing the task as a percentage: 0%	Benchmark achieved	Based on the quality assurance department file reviews, the average error rate for this task is

task as a percentage	percentage	submission of this report at: 5%			extremely low. As such, HACSM is establishing the benchmark as no more than 5%.
CE #5: Increase In Rental Revenue					
Rental Revenue in dollars	HACSM rental revenue FY13, prior to implementation of the activity, was \$1,653,740	HACSM expected the rental revenue after implementation of the activity to remain constant at approximately \$1,650,000	HACSM rental revenue in FY15 was \$1,777,306	Benchmark achieved	N/A

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2015-31: Local Referral Process for Supportive Service Exception Units, in Project Based Voucher (PBV) Complexes

Approved by HUD: FYE2015

Implemented by HACSM: 10/1/2014

Description of the activity

Current PBV regulations require the PHA provide applicants to an owner of PBV units from the PHA wait list. In general, this system is efficient and with on-going oversight and communication with PBV owners, HACSM has been able to provide a sufficient number of applicants for an owner to fill vacancies in a timely manner. The one area where this has been problematic has been in supportive service exception units, particularly the larger size exception units. Balancing the overall number of households on the waitlist while at the same time maintaining a sufficient number of households that can most benefit from the services provided for the exception units have proven to be quite challenging and time consuming. In some instances, it requires the opening and closing of the waitlist in order to expand the pool of applicants. This process is also confusing for the applicant households and at times causes delays in the lease up process.

To address this situation, HACSM has implemented a local referral process for supportive service exception units. The process is such that upon notice from an owner that an exception unit has been vacated, HACSM provides applicants to the owner from its waitlist. If HACSM is unable to provide a list of applicants to the project owner within 15 business days, or upon owner screening it is determined that none of the applicants provided by the PHA wait list meet the owner’s selection criteria or the applicants subsequently do not meet HACSM eligibility requirements, HACSM will accept direct referrals from the owner for eligibility determination for that exception unit. As always, the owner is required to notify HACSM, in writing, of any rejected applicant including the grounds for the rejection.

Impact of the activity

Upon HUD approval, HACSM implemented this activity in FY15. Since implementation, HACSM has not had to use the MTW flexibility. HACSM attributes this to the extremely challenging San Mateo County rental market. Families who reside in PBV exception units, who previously may have asked to exercise their right to relocate with a tenant based (MTW) voucher, simply have not. And for those that have vacated, HACSM had sufficient applicants to fill the vacated units without having to use the MTW flexibility associated with this activity.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
HC#3: Average Applicant time on wait list in months					
Average applicant time on wait list in months	FY15, the baseline is than 48 months	1 month	N/A	N/A	N/A

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2015-32: Revised EIV Income Report Review Schedule

Approved by HUD: FYE2015

Implemented by HACSM: 10/1/2014

Description of the activity

Effective January 31, 2010, HUD implemented new regulations mandating the use of EIV as a third party source to verify tenant employment and income information during mandatory certifications. Prior to the issuance of the HUD notice advising agencies of the revision, utilizing the EIV income report for interim certifications was not required by HUD, only during annual reexaminations. The reinterpreted regulations concerning the use of EIV changed the requirement such that review of the EIV income report is now a required component of all certification processes, including interim reexaminations.

The requirement to now use the EIV income report for both annual and interim reexaminations translates to additional staff time expended when processing interim reexaminations, which also renders an increase in costs, linked to the staff time for accessing and reviewing the EIV income report. In an effort to reduce cost and administrative burden, HACSM has modified the EIV review schedule by not generating the EIV income reports during interim reexaminations and only generating the EIV income report during annual or triennial reexaminations.

In concert with this, HACSM’s current interim policy allows for certain actions to be processed without having to meet with the family in person. For example, if a family reports a decrease in income, not associated with a family composition change, HACSM requires the family to submit the necessary documents to reflect the change. Based on the family’s documentation, HACSM recalculates the tenant and HAP portions accordingly. Not having to access and review the EIV income report at interim recertifications has led to a more efficient process for HACSM staff.

Impact of the activity

Upon implementation HACSM has found that this activity has reduced administrative costs by streamlining the EIV process for staff, without impacting staff’s ability to monitor a family’s pattern of undisclosed income during the reexamination processes. HACSM feels that it is already on track to meet the proposed benchmark for this activity for residents of the Housing Choice Voucher and Public Housing programs.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE #1: Agency Cost Savings					
Total cost of task in dollars	In FY14, prior to implementation, the cost complete this task was:	HACSM expects that the cost to complete this task will be: \$2,560	In FY15, the cost of completing this task was \$1,380	Benchmark achieved	N/A

	\$12,749				
CE #2: Staff Time Savings					
Total time to complete the task in staff hours	In FY14, it required 244 hours to complete this task	49 Hours	In FY15, the time to complete this task was 26.5 hours	Benchmark achieved	N/A
CE #5: Increase In Rental Revenue					
Rental Revenue in dollars	HACSM rental revenue FY13, prior to implementation of the activity, was \$1,653,740	HACSM expected the rental revenue after implementation of the activity to remain constant at approximately \$1,650,000	HACSM rental revenue in FY15 was \$1,777,306	Benchmark achieved	N/A

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2015-33: Local PBV Inspection Process

Approved by HUD: FYE2015

Implemented by HACSM: 10/1/2014

Description of the activity

Current HUD regulation allows PHAs to inspect a random 20% sample of PBV contract units in a building annually. If 20% of the inspected units fail HQS, PHAs then are required to inspect 100% of the units. Building on the success of the other HQS-related MTW activities, its close working relationship with PBV unit owners, and the quality of its PBV units, HACSM implemented a Local PBV Inspection Process to ensure PBV-owner’s compliance with HQS for all units under contract.

The Local PBV Inspection Process takes into account the HACSM biennial inspection schedule for its PBV units. With this activity, HACSM has the additional flexibility to instead choose to inspect 20% of its PBV units in a building annually. As always, if the inspected unit(s) fails HQS and the deficiencies are not corrected within 30 days upon notification to the project owner or the HACSM-approved extension period, HACSM will abate HAP for the unit. If the deficiencies are not corrected within 90 days after the abatement notice, HACSM will remove the unit from the PBV contract and no retroactive HAP will be made during the abatement period.

Impact of the activity

While HACSM implemented this activity immediately upon HUD approval, HACSM has not actively used its authority to only inspect 20% of PBV units in a project in FY15.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE #1: Agency Cost Savings					
Total cost of task in dollars	In FY14, it required \$15,570 to complete this task	HACSM expects that the cost to complete this task after implementation to be no more than \$6,218	N/A	N/A	N/A
CE #2: Staff Time Savings					
Total time to complete the task in staff hours	In FY14, it required 298 hours to complete this task	HACSM expects that after implementation it will require 119 hours to complete this task	N/A	N/A	N/A

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2015-34: Local Collections Process

Approved by HUD: FYE2015

Implemented by HACSM: 10/1/2014

Description of the activity

Where the PHA is the principal party initiating or sustaining an action to recover amounts from tenants or owners that are due as result of fraud and abuse, the HACSM may now retain a portion of the amount of HAP funds it recovers. With this MTW activity, HACSM is able to retain 100% of the amount it actually collects from a judgment, litigation, or an administrative repayment agreement. Without this activity, HUD allows PHAs to retain 50% of such amount and the other 50% is returned to HUD. HACSM uses the recovery proceeds to support the Housing Choice Voucher program as well as programs that have been approved by HACSM’s MTW Plans.

Impact of the activity

Since implementation in the HACSM collections department has been able to collect approximately \$36,000 in fraud recovery funds. Having the ability to retain 100% of those funds, has given HACSM approximately \$15,000 of additional funds to support the Section 8 program in San Mateo County.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
CE #1: Agency Cost Savings					
Total cost of task in dollars	In FY14, HACSM collected \$21,000 as a result of this activity	After implementation HACSM expects to collect \$42,000	In FY15, HACSM collected \$36,000 in fraud recovery fund and was able to retain 100% of the funds.	Benchmark achieved	N/A

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.

Activity #2015-35: Leasing Success Program

Approved by HUD: FYE2015

Implemented by HACSM: 10/1/2014

Description of the activity

In FY15, HACSM implemented the use of its Broader Use of Funds Authority in order to implement additional programs and activities to increase participation in the MTW program and the utilization of this highly valued housing assistance. According to the National Low Income Housing Coalition's 2014 publication, "Out of Reach," San Mateo County is one of the nation's most expensive jurisdictions in which to live. According to their report, a two bedroom household in the San Francisco metropolitan FMR area, of which San Mateo County is included, would need to have a wage of \$37.62 per hour in order to afford to live here. And, according to the San Mateo County Housing and Community Development Department, in the last year, while the FMR increased by 9% in San Mateo County, the rental market increased over 12% and in the last 4 years, from 2010 to the Third Quarter of 2014, the net change has been an increase of over 50%. For example, as of September 2014 the average market-rate rent for a one-bedroom unit was \$2,352 and for a two-bedroom unit it was \$2,648. Since publication of their report, the averages have continued to climb through the final Quarter of 2014. One additional factor that makes the San Mateo County housing market so challenging is the fact that, on average, the rental occupancy rate continues to remain over 95% in any given month. There simply is a very limited amount of rental housing, let alone affordable rental housing.

With HUD approval HACSM has allocated up to \$250,000 HAP funds annually for the next three years to this activity. Some of the initial activities include the following: 1) Contracting with organizations that have expertise in the rental market, that will assist program applicants and participants with "housing locator services," 2) Contracting with organizations that have substantial experience in shared housing to encourage HCV participation, 3) Creating a landlord incentive program, and 4) Creating a security deposit loan program.

Impact of the activity

In FY15, upon approval of this activity, HACSM published a request for proposals (RFP) to select a Housing Locator service. HACSM received four applications and selected one proposal. Over the course of the year, HACSM held a series of meetings with the selected organization but was ultimately unable to reach an agreement. In late FY15, HACSM continued its commitment to find and secure a housing locator service to support program participants in their leasing challenges and has begun negotiations with the organization that had the next highest score from their proposal. While the selection and contract process continues, HACSM has also been developing the policies for the landlord incentive program and security deposit assistance program. The security deposit assistance program will be a one-time grant, the details of which were being finalized in late June, 2015.

Benchmarks and outcomes comparison

Unit of Measurement	Baseline	Benchmark	FY15 Outcome	Benchmark Achieved?	Narrative of Challenges, if not Achieved and Potential New Strategy
HC#1 Additional Units of Housing Made Available					
Number of new housing units made available for households at or below 80% AMI	In FY 14, Zero (0) new housing units	HACSM expects 10 new housing units each fiscal year	N/A	N/A	As described above, HACSM has not yet executed a contract with a housing locator provider. And, due to this unforeseen challenge, has not been able to meet the proposed benchmark, originally noted in the FY15 Plan.
HC#3 Decrease in Wait List Time					
Average applicant time on waitlist in months	On average, applicants are on the HACSM wait list for 36 months	HACSM expects that applicants will be on the wait list for no more than 24 months	In FY15, the actual average applicant time on wait list was 1.2 months	Benchmark achieved	N/A
HC#5 Increase in Resident Mobility					
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity	Zero (0) households	10 households	Over the next three (3) years, HACSM expects that 60 additional households will be able to move to a better unit and/or neighborhood of opportunity	N/A	HACSM is in negotiations with a Housing Locator service to contract their assistance with finding rental units for program applicants and relocating participants. Once the contract has been finalized, HACSM will be able to being tracking this metric.
HC#7 Households Assisted by Services that Increase Housing Choice					
Number of households receiving services aimed to increase housing choice	Zero (0) households	120 households	TBD	N/A	When HACSM submitted this activity, the expectation was that over the next three (3) years 360 households will receive services aimed to increase their housing choice. Due to the unforeseen delays in establishing a contract with a Housing Locator Service, HACSM is reviewing the ability of a contractor to meet this goal as a result of the SMC rental market. Once a contract has been established, HACSM will update this metric.

Changes to the metrics, baselines or benchmarks

HACSM is not proposing changes to the baselines or benchmarks.

Changes to the data collection methodology

HACSM is not proposing any changes to the data collection methodology or data collected for this activity.



Not Yet Implemented Activities

HACSM does not have any MTW Activities that were approved by HUD, but not yet implemented.



Activities On Hold

HACSM does not have any HUD-approved MTW activities that were never implemented.



Closed Out Activities

Activity #2011-20: Apply Current Payment Standards at Interim Re-examination

Approved by HUD: 7/1/2010

Implemented by HACSM: 7/1/2010

Closed by HACSM: 7/1/2013

Rationale for Closing out the Activity

HACSM has closed out this activity, as over 98% of program participants are now on the Tiered Subsidy Table (MTW Activity # 2010-9) rendering the activity essentially obsolete.

SECTION V
Sources and Uses of 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

Describe the Activities that Used Only MTW Single Fund Flexibility

HACSM has provided a thorough narrative of each activity that used only the Single Fund Flexibility in the body of the Report, including the metrics used to track the outcomes of these programs or activities.

B. MTW Report: Local Asset Management Plan												
Has the PHA allocated costs within statute during the plan										Yes	N/A	
Has the PHA implemented a local asset management plan										N/A	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												
Has the PHA provided a LAMP in the appendix?										N/A	or	No
N/A												

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
Loans Receivable	Affordable Housing construction funds		5,500,000
Loans Receivable	Affordable Housing construct. funds under contract	2,114,110	
Expense	Provider Based Assistance	2,189,945	
Total Obligated or Committed Funds:		4,304,055	5,500,000

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.

Note : Written notice of a definition of MTW reserves will be forthcoming. Until HUD issues a methodology for defining reserves, including a definition of obligations and commitments, MTW agencies are not required to complete this section.

SECTION VI

Administrative

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

There have not been any HUD reviews, audits, or physical inspection issues requiring action by HACSM.

Results of latest PHA-directed evaluations of the demonstration

HACSM has not initiated any PHA-directed evaluations of the MTW demonstration program.

Certification of Statutory Requirements

The Housing Authority of the County of San Mateo hereby certifies that it (the Agency) has met the following three statutory requirements:

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 be combined; and
3. Maintaining a comparable mix of families (by family size) is served, as would have been provided had those amounts not been used under the demonstration

Housing Authority of the County of San Mateo
PHA Name

CA014
PHA Number/HA Code

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

William Lowell
Name of Authorized Official

Executive Director
Title


Signature

9/29/2015
Date