



Boulder Housing Partners
 Providing Homes, Creating Community, Changing Lives

Moving to Work

2017 ANNUAL REPORT



SUBMITTED MARCH 21, 2018

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I. INTRODUCTION

OVERVIEW OF MTW GOALS AND OBJECTIVES

This 2017 Annual Report highlights the activities of Boulder Housing Partners (BHP) in our sixth year as a participant in the Moving to Work (MTW) demonstration program. No new activities were proposed for 2017, however, we were busy refining and monitoring all the existing activities. There continues to be one activity from 2016 that has yet to be fully implemented (Activity 2016-3 Landing Landlords). We continued to be over-leased in the voucher program until September 2017 due to a below average attrition rate of less than 5% (in past years it has been between 10 – 12%). This activity will be implemented in 2018 as vouchers become available.

Over the years under MTW, BHP has:

- implemented rent reform for the elderly and disabled households
- simplified the recertification tools for all households
- eliminated the 40% cap of income towards rent for Housing Choice voucher holders
- simplified the utility allowance schedule for Housing Choice voucher households
- eliminated the utility reimbursement payments
- tied the Housing Quality Standards (HQS) inspection to the recertification cycle (triennially for all elderly and disabled families, biennially for all work-able families)
- strengthened our partnership with the Safehouse Progressive Alliance for Non-Violence (SPAN) to offer housing and services to victims of domestic violence
- used Replacement Housing Factor Funds (RHFF) to create 1175 Lee Hill, a 31-unit community to house the chronically homeless
- increased efficient use of federal dollars by allowing project-based voucher rents to be set internally using three external factors
- increased success of the Family Self Sufficiency program by changing mobility options
- implemented a flat tiered rent structure and biennial recertifications for our Housing Choice Work-able Families
- eliminated the need for all Housing Choice families to report income increases prior to their next regularly scheduled recertification
- ensured that all public housing families are paying rent according to their income by eliminating the option to choose the flat rent

- created a Development and Acquisition Fund which has allowed us to purchase 10 additional units of affordable housing and 5.25 acres of land for future development
- converted 279 units of public housing through Section 18 Disposition and Rental Assistance Demonstration Program, while creating 3 new community centers and renovating all units to like-new conditions
- created a new program, Bringing School Home, where we focus on families with children under the age of 6 and offer services so these children are school-ready by kindergarten

OVERVIEW OF BHP'S LONG-TERM VISION FOR THE MTW PROGRAM

As described in full detail in the 2017 MTW Annual Plan, Boulder Housing Partners will be focusing on three main areas in the coming years:

Bringing School Home

Transforming Bureaucracy

Increasing Housing Choice

Bringing School Home: Disrupting the Cycle of Poverty

The next ten years of Boulder's MTW program will center on a very big idea. We believe that **poverty continues to be a bar to learning and that quality affordable housing can change that.** Focusing on the success we have shared with the I Have a Dream Foundation, BHP is taking that program to a new level by expanding services to include children at an even younger age (0 to 5). We believe that we can break the cycle of poverty in two generations by focusing on families with young children and providing services to the entire family.

Transforming Bureaucracy: People, Not Paper

We believe housing programs should be focused on the people they serve, not the paperwork required. By creating efficiencies and streamlining the processes involved in admitting qualified households to the programs, BHP strives to free up staff time to focus on the people and their needs to be self-sufficient throughout every stage of life.

Increase Housing Choice

BHP's strategic plan calls for contributing 2,000 units to the city of Boulder's affordable housing stock over 10 years. We will use every tool available to us to make this happen which includes our MTW funding flexibility.

II. GENERAL HOUSING AUTHORITY OPERATING INFORMATION

A. HOUSING STOCK INFORMATION

See tables on following pages

B. LEASING INFORMATION

See tables on following pages

C. WAIT LIST INFORMATION

See tables on following pages

A. MTW Report: Housing Stock Information			
New Housing Choice Vouchers that were Project-Based During the Fiscal Year			
Property Name	Anticipated Number of New Vouchers to be Project-Based *	Actual Number of New Vouchers that were Project-Based	Description of Project
N/A	0	0	N/A
		Anticipated Total Number of Project-Based Vouchers Committed at the End of the Fiscal Year *	Anticipated Total Number of Project-Based Vouchers Leased Up or Issued to a Potential Tenant at the End of the Fiscal Year *

Anticipated
Total Number
of New
Vouchers to
be Project-
Based *

0

Actual Total
Number of
New
Vouchers that
were Project-
Based

0

399

Actual Total Number of
Project-Based Vouchers
Committed at the End
of the Fiscal Year

399

399

Actual Total Number of Project-
Based Vouchers Leased Up or
Issued to a Potential Tenant at the
End of the Fiscal Year

381

* From the Plan

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

BHP used MTW funds to assist with financing the acquisition of 19 units of local non-traditional housing on November 6, 2017. MTW funds paid for 4 of the 19 units.

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

General Description of Actual Capital Fund Expenditures During the Plan Year

BHP did not use any of the 2016 or 2017 Capital Fund increment.

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

Housing Program *	Total Units	Overview of the Program
Market Rate Housing	249	Market rate housing in 4 properties
Tax Credit	581	Tax credit housing in 13 properties
Boulder Affordable Rentals	320	Locally funded, affordable units in 16 properties
Project-Based Section 8 Contracts	116	Non-MTW HUD funded in 2 properties
Total Other Housing Owned and/or Managed	1266	

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

If Other, please describe:

N/A

B. MTW Report: Leasing Information

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

Housing Program:	Number of Households Served*	
	Planned	Actual
Federal MTW Public Housing Units that were leased/occupied	47	47
Federal MTW Housing Choice Voucher Units that were utilized	891	893
Number of Units that were Occupied/Leased through Local Non-Traditional MTW Funded Property-Based Assistance Programs **	6	6
Number of Units that were Occupied/Leased through Local Non-Traditional MTW Funded Tenant-Based Assistance Programs **	0	0
Port-In Vouchers (not absorbed)	0	0
Total Projected and Actual Households Served	938	940

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

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

Housing Program:

Unit Months Occupied/Leased****

Number of Units that were Occupied/Leased through Local Non-Traditional MTW Funded Property-Based Assistance Programs ***

Planned

Actual

66

76

Number of Units that were Occupied/Leased through Local Non-Traditional MTW Funded Tenant-Based Assistance Programs ***

0

0

Port-In Vouchers (not absorbed)

0

0

Total Projected and Annual Unit Months Occupied/Leased

66

76

BHP acquired an additional 4 units of local non-traditional housing on 11/6/2017.

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

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

**Average
Number of
Households
Served Per
Month**

**Total Number of
Households Served
During the Year**

Households Served through Local Non-Traditional Services Only

0

0

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

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

Fiscal Year:	2011	2012	2013	2014	2015	2016	2017	2018
Total Number of Local, Non-Traditional MTW Households Assisted	0	0	0	0	0	6	10	X
Number of Local, Non-Traditional MTW Households with Incomes Below 50% of Area Median Income	0	0	0	0	0	6	5	X
Percentage of Local, Non-Traditional MTW Households with Incomes Below 50% of Area Median Income	0%	0%	0%	0%	0%	100%	50%	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	188	268	0	456	49.03%
2 Person	17	145	0	162	17.42%
3 Person	23	61	0	84	9.03%
4 Person	46	66	0	112	12.04%
5 Person	46	42	0	88	9.46%
6+ Person	10	18	0	28	3.01%
Totals	330	600	0	930	100.00%

Explanation for Baseline Adjustments to the Distribution of Household Sizes Utilized

No adjustment has been made to the baseline. However, 283 units of public housing were converted under the Section 18 and Rental Assistance Demonstration Programs in 2015. These households are now counted in the Housing Choice Voucher Program as they all received either a Tenant Protection or RAD Voucher.

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 **	49%	17%	9%	12%	9%	3%	100%
Number of Households Served by Family Size this Fiscal Year ***	540	161	80	71	54	38	944
Percentages of Households Served by Household Size this Fiscal Year ****	57%	17%	9%	8%	6%	4%	100%
Percentage Change	17%	-2%	-6%	-37%	-39%	34%	0%

Justification and Explanation for Family Size Variations of Over 5% from the Baseline Percentages

No decisions were made by BHP to directly affect the changes to the mix of families served. BHP admits new households to the voucher program based on a lottery system.

* “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

Federal MTW Housing Choice Voucher Program

Description of Leasing Issues and Solutions

We began 2017 over leased in the voucher program and remained so until September 2017. However, we did not over spend available HAP.

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

Activity Name/#	Number of Households Transitioned *	Agency Definition of Self Sufficiency
2013-3 Partnership with SPAN	0	Moving to market rate or homeownership
2016-1 Flat tier rent for work able households	0	Moving to market rate or homeownership
2016-2 Rent reform for elderly and persons with disabilities households	0	Moving to market rate or homeownership
2016-4 Bringing School Home Referral process	0	Moving to market rate or homeownership

Households Duplicated Across Activities/Definitions	0
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ANNUAL TOTAL NUMBER OF HOUSEHOLDS TRANSITIONED TO SELF SUFFICIENCY	0
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* The number provided here should match the outcome reported where metric SS #8 is used.

C. MTW Report: Wait List Information

Wait List Information at Fiscal Year End				
Housing Program(s) *	Wait List Type **	Number of Households on Wait List	Wait List Open, Partially Open or Closed ***	Was the Wait List Opened During the Fiscal Year
Federal MTW Public Housing Units	Site-based (Arapahoe Court)	242	Closed	Yes
Federal MTW Public Housing Units	Site-based (Madison)	423	Closed	Yes
Federal MTW Housing Choice Voucher Program	Other - lottery system	120	Closed	Yes

More can be added if needed.

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

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

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

N/A

If Local, Non-Traditional Program, please describe:

N/A

If Other Wait List Type, please describe:

For the Housing Choice Voucher Program, BHP uses a lottery system.

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

III. PROPOSED MTW ACTIVITIES

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

IV. APPROVED MTW ACTIVITIES

IMPLEMENTED ACTIVITIES

ACTIVITY 2012–1

a. DESCRIPTION

Activity 2012–1, Allow BHP to commit project–based vouchers to converted units at public housing developments, was implemented in 2015. The conversion of 288 units (out of a total of 337 units) of public housing to vouchers through Section 18 Disposition and Rental Assistance Demonstration (RAD) Program occurred on September 30, 2015. BHP continues to have 49 units of Public Housing. Currently there is no concrete timeframe for disposition of these remaining units. The benchmarks reflect no activity for 2017.

b. OUTCOME OF HARDSHIP REQUESTS

This was not a rent reform activity and no hardship was created.

c. BENCHMARK RESULTS

Metric	Baseline	Benchmark	Outcome	Benchmark achieved?
CE #1 – Total cost of task in dollars (decrease) (elimination of competitive process)	\$1,680	Zero	N/A	N/A
CE #2 – Total time to complete the task in staff hours (decrease)	40 hours	Zero	N/A	N/A

d. BENCHMARK REVISIONS

The were no revisions made in 2017.

e. DATA COLLECTION METHODOLOGY

There have been no changes to the data collection methodology

ACTIVITY 2012–4

a. DESCRIPTION

Activity 2012–4, Rent simplifications for all households, was approved and implemented in 2012. The goal of this activity was to implement a series of changes to simplify the income and asset verification process for all families. This activity:

- allows households to provide asset and income documentation;
- excludes income from assets and allows for self–certification of assets that total \$50,000 or less; and
- limits total household assets to \$50,000 or less upon admission to the public housing and Housing Choice programs.

In 2017, two households were denied admission to the program for having total assets valuing more than \$50,000. One household qualified for an exception, the denial was overturned, and they were admitted into the voucher program.

b. OUTCOME OF HARDSHIP REQUESTS

This was not a rent reform activity and no hardship created. An exception policy was created for households who are elderly and/or persons with disabilities in relation to the asset limit upon admission.

c. BENCHMARK RESULTS

Metric	Baseline	Benchmark	Outcome	Benchmark achieved?
CE #1 – Total cost of task in dollars (decrease) asset income calculation	\$1,677 (64.5 hours x \$26 average per hour)	\$671 (Reduction of 60%)	2017 - \$293	Yes, reduction of \$1,382 or 83%
CE #2 – Total time to complete the task in staff hours (decrease) asset income calculation	64.5 staff hours (86 households x 45 minutes on average)	25.8 hours (Reduction of 60%)	2017 – 11.25 hours (15 households)	Yes, reduction of 53.25 hours or 83%

CE #3 – Average error rate in completing a task as a percentage (decrease)	5% Potential for error	3% reduction in potential for error	2% (15 households have assets over \$50,000) Reduction of 83% potential for errors	Potential for error reduced to 2%
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d. BENCHMARK REVISIONS

No revisions to the benchmarks were made in 2017.

e. DATA COLLECTION METHODOLOGY

There have been no changes to the data collection methodology.

ACTIVITY 2012–5

a. DESCRIPTION

Activity 2012–5, Elimination of the 40% of income cap in the voucher program, was approved and implemented in 2012. The goal was to provide more rental choices to Housing Choice voucher holders by eliminating the 40% of income towards rent cap when they initially lease up. In 2017, 10 families rented a unit where their portion of the rent was more than 40% (but less than 61%) of their income.

Since implementation of this activity in 2012, we have had a total of 68 households lease up with their rent burden being more than 40% of their income towards rent. When households choose to do this, they sign an agreement that confirms their understanding that they will lose their housing assistance if they are evicted for non-payment of rent. Not one household has lost their assistance since this choice has been offered.

b. OUTCOME OF HARDSHIP REQUESTS

This was not a rent reform activity and no hardship created.

c. BENCHMARK RESULTS

Metric	Baseline	Benchmark	Outcome	Benchmark achieved?
HC #5 – Number of households able to move to a better unit as a result of the activity (increase)	Zero	2% or 17 households per year	2017 – 10 households	No, only 1% in 2017. Outcome dependent on how many families choose to move.

d. **BENCHMARK REVISIONS**

No revisions were made to the benchmarks in 2017.

e. **DATA COLLECTION METHODOLOGY**

There have been no changes to the data collection methodology.

ACTIVITY 2012–6

a. **DESCRIPTION**

Activity 2012–6, Implement a flat utility allowance for the voucher program, was designed to increase voucher holders’ ease of understanding of the rent calculation and how utilities affect the maximum contract rent allowed. This activity was approved and implemented in 2012. Implementation of this activity will continue to allow for less time spent during the initial briefing to explain the utility allowance.

b. **OUTCOME OF HARDSHIP REQUESTS**

This was not a rent reform activity and no hardship created.

c. **BENCHMARK RESULTS**

Metric	Baseline	Benchmark	Outcome	Benchmark achieved?
CE #1 – Total cost of task in dollars (decrease) explanation of utility allowance in briefings	\$20/briefing (45 minutes x \$26 hour)	\$15 (25% reduction)	\$10/briefing (22 minutes x \$26 hour)	Yes
CE #2 – Total time to complete the task in staff hours (decrease)	Average of 45 minutes per briefing	34 minutes (25% reduction)	Average of 22 minutes per briefing	Yes
CE #3 – Average error rate in completing a task as a percentage (decrease)	5% potential for error	0% reduce to zero	0%	Yes

CE #5 – Tenant Rent Share in dollars (increase)	Average utility allowance in 2011 was \$70	Reduction of \$6 for the average utility allowance	Average utility allowance was \$63, reduction of \$7 or 10%	This outcome was achieved in 2012
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d. BENCHMARK REVISIONS

No revisions were made to the benchmarks in 2017.

e. DATA COLLECTION METHODOLOGY

There have been no changes to the data collection methodology.

ACTIVITY 2013–1

a. DESCRIPTION

Activity 2013–1, Housing Quality Standards Inspection Schedule, was written to replace Activity 2012–7 and was approved and implemented in 2013. This activity aligns the HQS inspection with the recertification schedule. Beginning in 2013, for all households who are elderly or a person with disabilities, the inspection schedule now follows the recertification schedule which is conducted every three years. Beginning in 2014, when Activity 2014–1 was implemented, inspections for the work-able family households were lined up with the biennial recertification schedule.

b. OUTCOME OF HARDSHIP REQUESTS

This was not a rent reform activity; no hardship was created.

c. BENCHMARK RESULTS

Metric	Baseline	Benchmark	Outcome	Benchmark achieved?
CE #1 – Total cost of task in dollars (decrease) inspections following the recertification schedule	2012: \$26,425 (755 inspections x \$35 per inspection)	\$8,720 (Reduction of 66%)	2017 – \$9,520 (272 inspections) 64% reduction;	Very close

CE #2 – Total time to complete the task in staff hours (decrease)	Inspections are conducted by an outside contractor	N/A	N/A	N/A – savings relate to cost of outside contractor, not staff
CE #3 – Average error rate in completing a task as a percentage (decrease)	Activity not designed to reduce errors	N/A	N/A	N/A – savings relate to cost of outside contractor, not staff

d. BENCHMARK REVISIONS

No revisions were made to the benchmarks in 2017.

e. DATA COLLECTION METHODOLOGY

There have been no changes to the data collection methodology.

ACTIVITY 2013–2

a. DESCRIPTION

Activity 2013–2, Eliminate Utility Reimbursement Payments, was approved and implemented in 2013. The focus of this activity was to ensure that all public housing residents and Housing Choice participants are contributing towards their rental payment (or at a minimum to ensure that residents and participants are not receiving payments to live on housing assistance). Households who received a utility reimbursement payment (URP) in April 2013 continued to receive one through March 2014, unless there was an interim change in their circumstances that resulted in no URP. No new instances of URP were allowed after April 1, 2013.

b. OUTCOME OF HARDSHIP REQUESTS

All households who were receiving URP on April 1, 2013 continued to receive it until their circumstances changed which disqualified them, or March 1, 2014, whichever came first. Households met with their Voucher Specialist within the first three months of implementation. Reminders with information on utility use and grants were sent in October 2013 and January 2014. There were 12 households who were still receiving URP as of March 31, 2014, and it was eliminated as of as of April 1, 2014, when the hardship ended.

C. BENCHMARK RESULTS

Metric	Baseline	Benchmark	Outcome	Benchmark achieved?
CE #1 – Total cost of task in dollars (decrease) elimination of utility reimbursement payments	\$12,396 (cost of 42 URP as of 4/1/2013) \$247 (cost to mail 42 URPs each month)	Zero	Zero	Yes, outcome achieved in 2014
CE #2 – Total time to complete the task in staff hours (decrease)	84 staff hours (42 checks x 10 minutes per check to print, stuff and mail)	Zero	Zero as of 4/1/14	Yes, outcome achieved in 2014
CE #3 – Average error rate in completing a task as a percentage (decrease)	This activity was not designed to eliminate errors	N/A	N/A	N/A
CE #5 – Tenant Rent Share in dollars (increase)	Participants receiving a utility reimbursement had a tenant rent share of zero	No change anticipated	Tenant rent share remains at zero; however, they no longer receive the utility reimbursement payment to pay for their utilities	Yes, outcome achieved in 2014

d. BENCHMARK REVISIONS

No revisions were made to the benchmarks in 2017.

e. DATA COLLECTION METHODOLOGY

There have been no changes to the data collection methodology.

ACTIVITY 2013–3

a. DESCRIPTION

Activity 2013–2, Local Voucher Program in Partnership with Safehouse Progressive Alliance for Nonviolence (SPAN), was approved and implemented in 2013. This activity focuses on continuing BHP’s partnership with SPAN, which provides eight families who are victims of domestic violence with housing assistance through BHP and case management services through SPAN. This activity allows BHP to use vouchers for transitional housing.

On January 1, 2017, we had eight families participating in this program. We had two participants leave the program (one was terminated from the program and one passed away). We added one new participant and on December 31, 2017 had seven families participating in the program: five who entered the program in 2016 and will be up for graduation in 2018, one who entered the program in 2014 and is not yet eligible for graduation, and one who entered the program in 2017 and will be eligible for graduation in 2019.

b. OUTCOME OF HARDSHIP REQUESTS

This was not a rent reform activity and no hardship created.

c. BENCHMARK RESULTS

Metric	Baseline	Benchmark	Outcome	Benchmark achieved?
CE #4 – Amount of funds leveraged in dollars (increase)	Zero, prior to this activity, no households were receiving services	\$16,000 (\$2,000 per household x 8 households)	2017 - \$18,000	Yes
SS #5 – Number of households receiving services aimed to increase self-sufficiency (increase)	Zero	8	9	Yes
SS #8 – Number of households transitioned to self-sufficiency (increase). Self-	Zero	2 in 2017	2017 – 0	No

sufficiency defined as exiting program and moving into market rental or home ownership				
HC #3 – Average applicant time on wait list in months (decrease)	12 months	6 months (Reduce by 50% based on this being a two-year transitional program)	2017 – decrease of 50%	Yes
HC #5 – Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase)	Zero	8	8	Yes, these families are victims of domestic violence, therefore all have moved to better situations and units

d. BENCHMARK REVISIONS

No revisions were made in 2017.

e. DATA COLLECTION METHODOLOGY

There have been no changes to the data collection methodology.

ACTIVITY 2013–4

a. DESCRIPTION

Activity 2013–4, Use of Replacement Housing Factor Funds for other housing, was approved and implemented in 2013. This activity allows BHP to use Replacement Housing Factor (RHF) Funds to build other affordable housing units. In 2013, BHP used RHF Funds at 1175 Lee Hill, a 31–unit community for chronically homeless using the Housing First model. Construction began in 2013, with full completion and full occupancy in November 2014. With the disposition of 148 public housing units in 2015, BHP anticipates receiving Demolition or Disposition Transitional Funding in 2016 and will use those funds for other local affordable housing opportunities. In 2017, no funding was used.

b. OUTCOME OF HARDSHIP REQUESTS

This was not a rent reform activity and no hardship was created.

c. BENCHMARK RESULTS

Metric	Baseline	Benchmark	Outcome	Benchmark achieved?
CE #4 – Amount of funds leveraged in dollars (increase)	Zero	For all other years, benchmark is zero, activity is opportunity driven and no benchmark can accurately be set beyond the initial year. 2013 – \$7,433,805	2017 – \$0; 2016 – \$0; 2015 – \$0; 2014 – \$0; 2013 – \$7,433,805 for 1175 Lee Hill	Yes
HC #1 – Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase)	Zero	2013 – 31	2017 – 0; 2016 – 0; 2015 – 0; 2014 – 31 new units for chronically homeless at 1175 Lee Hill	Yes
HC #2 – Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase)	Zero	Zero	2017 – 0; 2016 – 0; 2015 – 0; 2014 – 0	Yes
HC #5 – Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase)	2014 – 31 households	2014 – 31	2017 – 0; 2016 – 0; 2015 – 0; 2014 – 31 formerly homeless households housed at 1175 Lee Hill	Yes

d. BENCHMARK REVISIONS

No revisions were made to the benchmarks in 2017. Due to the timing of receipt of the funds and the nature of this being a market-driven opportunity, units will be added as the opportunity arises.

e. DATA COLLECTION METHODOLOGY

There have been no changes to the data collection methodology.

ACTIVITY 2014-4

a. DESCRIPTION

Activity 2014-4 removed the flat rent option for all households in public housing. This activity was approved and implemented in 2014. In 2015, 288 of the total 337 public housing units were converted to project-based vouchers. Benchmarks for this activity were reset in 2016 for the remaining 49 public housing units.

b. OUTCOME OF HARDSHIP REQUESTS

This activity was implemented for families in 2014 and families were given six-months’ notice of the rent amount they would pay under this activity. No further hardships have been granted.

c. BENCHMARK RESULTS

Metric	Baseline	Benchmark	Outcome	Benchmark achieved?
CE #5 – PHA rental revenue in dollars (increase)	\$5,544 (revised from original benchmark to reflect the 49 remaining PH units as of 12/31/15)	\$8,292	\$4,200	No, dependent on households and incomes, in 2017 only 2 households had rent portion higher than flat rent

d. BENCHMARK REVISIONS

No revisions were made to the metrics in 2017.

e. DATA COLLECTION METHODOLOGY

There have been no changes to the data collection methodology.

ACTIVITY 2014–5

a. DESCRIPTION

Activity 2014-5 changes the mobility options for families who live at Woodlands, a project-based voucher community, and participate in the Family Self-Sufficiency (FSS) Program. This activity was approved and implemented in 2014. To request the next available voucher and move out of Woodlands, families must stay a minimum of three years (except in extenuating circumstances). Upon successful graduation from FSS, they must leave Woodlands, and may go with a voucher if the family continues to need the housing assistance. In 2017, we had 12 households move out of Woodlands, seven of which were successful graduations (three households were terminated from the program and two left the program without graduating). Of the seven successful graduations, all of them earned escrow while participating, with an average payout of \$6,709. Six of the seven did not need the voucher upon graduation (one purchased a home), one left with a voucher.

b. OUTCOME OF HARDSHIP REQUESTS

Households may request an exemption from the three-year rule for extenuating circumstances. In 2017, there were no requests.

c. BENCHMARK RESULTS

Metric	Baseline	Benchmark	Outcome	Benchmark achieved?
CE #1 – Total cost of task in dollars (decrease) applicant processing	\$780 (30 hours x \$26 per hour average)	\$390 (15 hours x \$26 per hour average)	\$1,300 (50 hours x \$26 per hours on average)	No, we had more move ins than anticipated
CE #2 – Total time to complete the task in staff hours (decrease)	30 total hours (5 hours on average x 6 families)	15 total hours (5 hours on average x 3 successful graduations)	50 total hours (5 hours on average x 10 move ins)	No, we had more move ins than anticipated
HC #3 – Average applicant time on FSS wait list in months (decrease)	10.3 months	Decrease of one month	2017 – decrease of 3.5 months (6.8 months)	Yes

d. **BENCHMARK REVISIONS**

No revisions were made in 2017.

e. **DATA COLLECTION METHODOLOGY**

There have been no changes to the data collection methodology.

ACTIVITY 2014–6

a. **DESCRIPTION**

Activity 2014-6 allows BHP to set rent limits and conduct our own rent reasonableness test for vouchers that have been project-based and the developer has conducted a market study. This activity was approved and implemented in 2014. In 2014, this activity was applied specifically to the vouchers that were project-based at 1175 Lee Hill, which is a 31-unit community that houses the chronically homeless. In 2015, it was applied to Kalmia and Walnut Place, the two public housing sites that converted under Section 18 disposition to project-based vouchers. The authority under this activity was not used in 2017, as there were no vouchers that were project-based.

b. **OUTCOME OF HARDSHIP REQUESTS**

This is not a rent reform activity and no hardship was created.

c. **BENCHMARK RESULTS**

Metric	Baseline	Benchmark	Outcome	Benchmark achieved?
CE #1 – Total cost of task in dollars (decrease) to set reasonable rents	Average cost of an independent consultant to determine reasonable rent: \$6,000	Total cost reduced to \$130 (Reduce external cost by \$6,000; Increase internal staff time to \$130 (5 hours x \$26))	2017 – 0; 2016 – 0; 2015 – \$650 (Kalmia and Walnut Place); 2014 – \$130 (1175 Lee Hill)	N/A
HC #1 – Number of new housing units made for households at or below 80% AMI as a result of activity	31 in 2014	31 in 2014	2017 – 0; 2016 – 0; 2015 – 0; 2014 – 31	N/A

HC #2 – Number of housing units preserved for households at or below 80% AMI that would otherwise not be available	148 in 2015	148 in 2015	2017 – 0; 2016 – 0; 2015 – 148; 2014 – 0	N/A
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d. BENCHMARK REVISIONS

The benchmarks or metrics have not been revised for this activity.

e. DATA COLLECTION METHODOLOGY

There have been no changes to the data collection methodology.

ACTIVITY 2015–1

a. DESCRIPTION

Activity 2015-1 allows BHP to create an affordable housing acquisition and development fund. This activity was approved and implemented in 2015. MTW funds can be used to pursue opportunities in the city of Boulder to build new rental units as well as acquire existing land and/or units to increase the number of affordable housing units.

This activity is very dependent on available market opportunities. In 2017, BHP spent \$1,123,947 of MTW funds to finance the acquisition of 4 units, located at Cedars/Casey property (which is a total of 19 units), which are now part of BHP’s Affordable Housing Program. This program targets households at less than 60% AMI.

b. OUTCOME OF HARDSHIP REQUESTS

This is not a rent reform activity and no hardship was created.

C. BENCHMARK RESULTS

Metric	Baseline	Benchmark	Outcome	Benchmark achieved?
HC #1 – Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase).	Zero	Zero	2017 – 4 units; 2016 – 6 apartments, and 5.25 acres of land; 2015 – 0	Yes
HC #2 – Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase).	Zero	Zero	2017 – 0; 2016 – 0; 2015 – 0	Yes
HC #5 – Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase)	Zero	Zero	2017 – 0; 2016 – 0; 2015 – 0	Yes
CE #4 – Amount of funds leveraged in dollars (increase)	Zero	Zero	2017 – \$4,565,559; 2016 – \$781,469; 2015 – 0	Yes

d. BENCHMARK REVISIONS

The benchmarks or metrics have not been revised for this activity. Due to the timing of receipt of the funds and the nature of this being a market-driven opportunity, units will be added as the opportunity arises.

e. DATA COLLECTION METHODOLOGY

There have been no changes to the data collection methodology.

ACTIVITY 2015–2

a. DESCRIPTION

Activity 2015-2 allows the partners and/or owner at project-based voucher communities to refer applicants to these properties, which offer in-depth case management services. This activity was approved and implemented in 2015. This activity includes 399 project-based vouchers in 10 communities. For these 10 communities, there were a total of 47 move ins during 2017.

b. OUTCOME OF HARDSHIP REQUESTS

This is not a rent reform activity and no hardship was created.

c. BENCHMARK RESULTS

Metric	Baseline	Benchmark	Outcome	Benchmark achieved?
CE #1 – Total cost of task (decrease) to maintain wait list	\$7,800 (300 hours per year x \$26 per hour)	\$2,600	2017 - \$2,440	Yes
CE #2 – Total time to complete the task in staff hours (decrease)	300 hours	100 hours (time spent processing applications, average of 1 hour per application)	2017 – 94 hours	Yes
HC #3 – Average applicant time on wait list in months (decrease)	31.5 months	2 months	2017 – 1 month	Yes
HC #4 –Households at or below 80% AMI that would lose assistance or need to move (decrease)	Zero	Zero	2017 – 0	Yes

d. BENCHMARK REVISIONS

BHP had 120 project-based voucher units when this activity was created. In 2015, BHP converted 279 units of public housing to project-based vouchers. Due to this increase, the baseline has been revised to include an annual turnover rate of 25% on 399 units.

e. DATA COLLECTION METHODOLOGY

There have been no changes to the data collection methodology.

ACTIVITY 2016–1

a. DESCRIPTION

Activity 2016-1 replaced and amended Activity 2014–1: Rent Reform for Housing Choice Work-able Families. The activity was approved and implemented in 2016. The elements included in this rent reform are:

- *Flat tiered rent system*: total tenant payment is calculated using a two-step system. Based on family size and gross income, the family falls into an income tier. The income tier and the size of the unit determine the total tenant payment for the family. From this amount, if applicable, the utility allowance is subtracted, a flat fee per ineligible family member is added, and any amount the gross rent exceeds the payment standard is added. In 2016, rents within tiers 2 – 15 increased by 5%.
- *Minimum rent*: the minimum rent is based on bedroom size and ranges from \$120 – \$180.
- *Biennial recertification*: households are recertified every two years.
- *No interim recertification*: all interim recertifications were eliminated except for family composition or status changes, or if the family moves. If the household is claiming income that places them in the lowest income tier, all increases in income must be reported until the family's income places them into income tier two.
- *Flat fee per ineligible family member*: for those members who are not legally eligible to receive housing assistance, a flat fee per member per month is added to their total tenant payment. In 2016, the flat fee was amended to \$125 per family member.

With the 2015 conversion of 288 public housing units to the project-based voucher program, the work-able families have been divided into two groups. The original Housing Choice work-able families will recertify every even year, with recertification effective on June 1. The converted public housing work-able families will recertify every odd year, with recertification effective October 1. This report shows results for the project based (or converted) households that were recertified in 2017.

The method in which income is calculated also changed under this activity. Income is now considered as either (1) current, stable income or (2) past two-year history of income. At the time of recertification, 7 families were reporting that they currently had no income or very sporadic income. Based on their two-year history of past income, these families had an average of \$14,241 of annual income.

There was an average increase in income of 25% for this group, which resulted in an increase in tenant rent. Average rent burden is 35%.

b. OUTCOME OF HARDSHIP REQUESTS

There were two different hardship cases for this activity.

Maximum rent increases: In 2015 the public housing units were converted to the voucher program, and the work-able families were transitioned to the flat tier rent program. Eighty-eight families received a hardship capping their rent increase at 7%. When families were recertified in October 2017, 44 families had experienced an increase in income and no longer received a hardship. The average increase in income for these families was \$11,394. Seventeen families moved from one unit to another, 2 families added a household member with income, 12 families moved prior to recertification and 3 households experienced a decrease in income.

No interim recertification: In 2017, we received 33 requests for an interim recertification due to income loss. Of these 33 requests, ten were approved for an interim to be processed and their rent portion was adjusted accordingly. One family became a non-work-able family due to head of household becoming disabled and was switched to the appropriate rent structure. Of the 22 that were denied, one family was referred to the Safety Net Program and was assisted. The total assistance was \$920.

c. BENCHMARK RESULTS

There are two sets of metrics for this activity, each set relates to a different group. When the activity was originally implemented in 2014, it included the tenant-based voucher work-able families along with our Broadway East family site. The baselines for this group were set in 2014 and outcomes will be reported every even year, in which the recertification takes place. The second set of metrics applies to the converted public housing work-able families. This group was originally transitioned to the flat tier rent system in October 2015. Baselines reflect the data as of 12/31/2015 for this group.

Metrics for tenant-based voucher work-able families who were recertified effective June 1, 2016 and will be recertified in 2018. Baseline reflect the data as of 12/31/2014.

Metric	Baseline	Benchmark	Outcome	Benchmark achieved?
CE #1 – Total cost of task (decrease)	\$21,684 (834 staff hours x \$26 per hour)	\$13,010 (40% reduction over the two-year recertification period)	2017 result - \$0	Yes, this group was not recertified in 2017
CE #2 – Total time to complete the task in staff hours (decrease)	834 total staff hours (3 staff hours per recertification X 278 recertifications)	500 hours (40% reduction over the two-year recertification period)	2017 result - 0	Yes, this group was not recertified in 2017
CE #5 – Tenant Rent Share in dollars (increase)	\$341 (this number is prior to any rent reform being implemented)	\$365 (Increase of no more than 7%)	2016 result – \$575, increase of 69%	No, rent is based on many factors, including income increases, increase in tier rents, contract rents, etc.
SS #1 – Increase in household income	\$16,073 (as of 12/31/2015)	\$16,395 (Increase of 2% for total of \$20,904)	2016 result – \$21,665, increase of 35%	Yes, increased by \$5,592
SS #3 – Increase in positive outcomes in employment status: <ul style="list-style-type: none"> - Full Time - Part Time - Educational Program - Job Training - Unemployed - Other 	Employed full time – 102; Employed part time – 106; Unemployed – 44; Other – 26	Full time: 104 (increase of 2%) Part time: 108 (increase of 2%) Educational Program: no change Job Trainee: no change Unemployed: 43 (decrease of 2%)	Employed full time – 146 (30% increase); Employed part time – 67 (58% decrease); Educational program – 0; Job training – 0; Unemployed – 28 (57% decrease); Other – 5 (420% decrease)	Between full time and part time employment, there are 2% more families employed (30% in full time employment); the number of unemployed families decreased by 57%
SS #4 – Number of households receiving TANF (decrease)	15 household	No decrease	15 households	Changes in circumstances and households entering the program make this metric difficult to control

SS #5 – Number of households receiving services aimed to increase self-sufficiency	Zero	No increase	Zero	No, activity not aimed at increasing services
SS #8 – Number of families moved to self-sufficiency. Self-sufficiency defined as exiting program and moving into market rental or home ownership	Zero	1 (one)	Zero	29 (2 families voluntarily gave up voucher, 27 families' income increased to the point where they no longer qualify to receive HAP)

Metrics for project-based voucher work-able families who were transitioned to the flat tier rent structure effective October 1, 2015 and were recertified in 2017. This group recertifies every odd year.

Metric	Baseline	Benchmark	Outcome	Benchmark achieved?
CE #1 – Total cost of task (decrease)	\$12,717 (471 staff hours x \$26 per hour)	\$7,358 (40% reduction over the two-year recertification period)	\$9,072	No, as 2017 was the year in which this group was recertified
CE #2 – Total time to complete the task in staff hours (decrease)	471 total staff hours (3 staff hours per recertification X 157 recertifications)	283 hours (40% reduction over the two-year recertification period)	336	No, as 2017 was the year in which this group was recertified
CE #5 – Tenant Rent Share in dollars (increase)	\$484 (this number is prior to any rent reform being implemented)	\$518 (Increase of no more than 7%)	2017 result – \$785, increase of 62%	No, rent is based on many factors, including income increases, increase in tier rents, contract rents, etc.
SS #1 – Increase in household income	\$20,494 (as of 12/31/2015)	\$410 (Increase of 2%) for total of \$20,904	2017 result – \$29,219 increase of 42%	Yes, increased by \$8,725

<p>SS #3 – Increase in positive outcomes in employment status:</p> <ul style="list-style-type: none"> - Full Time - Part Time - Educational Program - Job Training - Unemployed - Other 	<p>Employed full time – 94; Employed part time – 24; Unemployed – 4; Other – 7</p>	<p>Full time: 96 (increase of 2%) Part time: 24 (increase of 2%) Educational Program: no change Job Trainee: no change Unemployed: 3 (decrease of 2%)</p>	<p>Employed full time – 95 (1% increase); Employed part time – 9 (167% decrease); Educational program – 0; Job training – 0; Unemployed – 8 (50% decrease); Other – 0 (100% decrease)</p>	<p>Between full time and part time employment, there are 12% decrease; the number of unemployed families decreased by 50%</p>
<p>SS #4 – Number of households receiving TANF (decrease)</p>	<p>1 household</p>	<p>No decrease</p>	<p>5 households</p>	<p>Changes in circumstances and households entering the program make this metric difficult to control</p>
<p>SS #5 – Number of households receiving services aimed to increase self-sufficiency</p>	<p>Zero</p>	<p>No increase</p>	<p>Zero</p>	<p>No, activity not aimed at increasing services</p>
<p>SS #8 – Number of families moved to self-sufficiency. Self-sufficiency defined as exiting program and moving into market rental or home ownership</p>	<p>Zero</p>	<p>1 (one)</p>	<p>Zero</p>	<p>No</p>

d. BENCHMARK REVISIONS

Revisions were made to separate the two groups of vouchers: Housing Choice (tenant based) versus Project Based Vouchers. This change was made due to the recertification schedule of each group being in separate years and the addition of services to the Project-Based Voucher sites. Each group will be reported on separately each year.

e. DATA COLLECTION METHODOLOGY

There have been no changes to the data collection methodology.

ACTIVITY 2016–2

a. DESCRIPTION

Activity 2012–2, Rent simplifications for elderly and disabled households, was approved and implemented in 2012. This activity focuses on four areas: 1) rent based on 26.5% of gross income; 2) triennial recertification; 3) income disregard and 4) a limit on interim decreases. Under Activity 2014–3, interims for income loss were limited to one per calendar year.

Activity 2016–2 replaces Activity 2012-2 and 2014-3 by incorporating all the elements of these activities and adds the flat fee per ineligible family member to be consistent across all households with mixed citizenship status.

b. OUTCOME OF HARDSHIP REQUESTS

The hardship capped their rent increase at 7% provided all other variables (such as income, contract rent, utility allowance, etc.) remained the same. Below are the dates and number of households who continue to receive a hardship:

- December 31, 2013 – 57 households
- December 31, 2014 – 41 households
- December 31, 2015 – 25 households
- December 31, 2016 – 19 households
- December 31, 2017 – 16 households

Three households lost the hardship

- 1 (33%) left the program (2 ported out of our jurisdiction)
- 2 (66%) experienced a subsequent increase in their portion of the rent that was less than 7%, therefore the hardship ended

C. BENCHMARK RESULTS

Metric	Baseline	Benchmark	Outcome	Benchmark achieved?
CE #1 – Total cost of task in dollars (decrease) triennial recertification schedule	2012: cost of \$46,332 (1,782 staff hours x \$26 per hour with an average of 3 hours per recertification)	\$15,290 (Reduce total number of recertifications to 198 with reduction of hours in staff time of greater than 66% (less than 606 hours)	2017 – \$18,018 (693 hours) 61% reduction	No
CE #2 – Total time to complete the task in staff hours (decrease) triennial recertification schedule	2012 total staff time of 1,782 (3 hours average per recertification x 594 annuals processed)	588 hours (Reduction of hours in staff time of less than 66%)	2017 – 693 hours (231 annuals) 61% reduction	No
CE #2 – Total time to complete the task in staff hours (decrease) elimination of medical deductions	In 2011, 232 households had medical deductions, average was 1 hour per recertification to calculate these deductions	Zero hours	2012: Reduction in staff time of 232 hours, equals staff savings of \$6,032 = 232 x \$26 per hour)	This outcome was achieved in 2012, and BHP continues to realize savings due to elimination of medical deductions from the calculation
CE #3 – Average error rate in completing a task as a percentage (decrease)	50% potential for errors calculating medical deductions	Decrease to zero potential	Zero (all deductions have been eliminated)	Yes, potential for error has been eliminated

CE #5 – Tenant Rent Share in dollars (increase)	Average Public Housing: \$235 Average Housing Choice: \$274	Zero increase	2017 results Public Housing: increase of \$10 (total \$245) Housing Choice: increase of \$17 (total \$291)	No, incomes have been increasing slightly since implementation of the activity in 2012
SS #1 – Increase in household income	\$11,616 Average household income at 12/31/13	\$11,848 (Increase of 2%)	2017 - \$13,410 (increase of 15%)	Yes
SS #3 – Report the following separately for each category: (1) Employed Full-Time (2) Employed Part-Time (3) Enrolled in Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other	65 total households employed (when this metric was written in 2012, it was not separated by category)	66 (Increase of 1% increase (when this metric was written in 2012, it was not separated by category))	2017 results: Employed full time – 12; Employed part time – 33; Educational program – 0; Job training program – 0: Unemployed – 11: Others – 192 (main source of income is SS or SSDI based on population type)	No, there was a 31% decrease in number of households that were employed, which makes sense based on the population being elderly and/or disabled households
SS #8 – Number of households transitioned to self-sufficiency (increase). Self-sufficiency defined as exiting program, moving into market rental or home ownership	Zero	Zero	Zero	This activity applies to households who are elderly and/or disabled and are not expected to obtain self-sufficiency

d. BENCHMARK REVISIONS

No revisions have been made to the benchmarks in 2017.

e. DATA COLLECTION METHODOLOGY

There have been no changes to the data collection methodology.

ACTIVITY 2016–3

a. DESCRIPTION

The goal of Activity 2016-3 is to attract more landlords to participate in the Housing Choice Voucher Program. This activity was approved in 2016 and part of it was implemented in 2016. There are four elements to this activity:

- Landlord Incentive Payment
- Damage Claim Fund
- Security Deposit Revolving Loan Fund
- Moving with Continued Assistance

The Housing Choice Voucher Program was over leased from January 2016 until September 2017 and no new vouchers have been issued since early 2016. The first three elements of this activity were not implemented in 2016 or 2017. The process and procedures were created, and the funds earmarked for these elements in 2016, and they will be implemented in 2018 when vouchers become available.

The fourth element, Moving with Continued Assistance, was implemented in 2016. During 2017, five households were asked to come into compliance with their current landlord, prior to being able to move with continued assistance. All five households did come into compliance and were able to move.

b. OUTCOME OF HARDSHIP REQUESTS

This is not a rent reform activity and no hardship was created.

c. BENCHMARK RESULTS

Metric	Baseline	Benchmark	Outcome	Benchmark achieved?
HC #5 – Number of households able to move to better unit and/or neighborhood of opportunity as a result of the activity	Zero	Zero	Zero	Yes

d. BENCHMARK REVISIONS

The benchmarks or metrics have not been revised for this activity.

e. DATA COLLECTION METHODOLOGY

There have been no changes to the data collection methodology.

ACTIVITY 2016–4

a. DESCRIPTION

Activity 2016-4, Bringing School Home Referral Process, is the first step in our bigger program, Bringing School Home, which is designed to positively disrupts factors working against the success of children. This activity was approved and implemented in 2016. This activity allows us to bring families with children age 0 – 5 into 5 of our sites where services are offered through the Bringing Home School Program. In 2017, 13 families entered the program. The goal of this program is for all new admissions to these sites to have children between 0 and 5 and commit to participate in the services offered through this program.

The average time an applicant is on the waitlist has decreased from 2 years to 122 days. Our benchmark of 2 months is an estimate that was created without historical data on our new process to inform the estimate. The current average number of days on the waitlist of 122 days may be a better estimate for our benchmark going forward. We will continue to monitor as more applicants move in and will adjust our benchmark accordingly.

b. OUTCOME OF HARDSHIP REQUESTS

This is not a rent reform activity and no hardship was created.

C. BENCHMARK RESULTS

Metric	Baseline	Benchmark	Outcome	Benchmark achieved?
SS #5 – Number of households receiving services aimed to increase self-sufficiency (increase)	Zero	100% of all new admissions based on vacant units	2017 – 13 families (100% of new admissions)	Yes
SS# 8 – Number of households transitioned to self-sufficiency (increase)	Zero	Zero	Zero	Yes, goal is families with young children staying housed long term to provide educational opportunities
HC #3 – Average applicant time on wait list in months (decrease)	24 months	2 months	4.07 months (122 days average)	No
HC #4 – Number of households at or below 80% AMI that would lose assistance or need to move (decrease). This activity targets families with children	Zero	Zero	Zero	Yes, activity is not designed to require households to move or lose assistance
HC #5 – Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase)	Zero	Zero	Zero	Yes, goal is to have families stay housed long term to provide success for children

HC #7 – Number of households receiving services aimed to increase housing choice (increase)	Zero	Zero	Zero	Yes, goal is to have families stay housed long term to provide success for children
CE #4 – Amount of funds leveraged in dollars (increase)	Zero	\$9,408	\$8,726	No, number of units that turned over was lower than anticipated

d. BENCHMARK REVISIONS

The benchmarks or metrics have not been revised for this activity.

e. DATA COLLECTION METHODOLOGY

There have been no changes to the data collection methodology.

ACTIVITIES NOT YET IMPLEMENTED

BHP does not have any activities that have not been implemented.

ACTIVITIES ON HOLD

BHP does not have any activities that have been placed on hold.

CLOSED OUT ACTIVITIES

ACTIVITY 2012–2

MTW Activity 2012 – 2, Rent Reform for elderly and disabled households was implemented in 2012. It was amended under Activity 2014–3. Further changes were made to the rent reform in 2016 and all aspects of this activity were incorporated into Activity 2016–2.

- a. YEAR APPROVED
2012
- b. YEAR IMPLEMENTED (IF APPLICABLE)
2012
- c. YEAR ACTIVITY CLOSED
2016
- d. FINAL OUTCOME AND LESSONS LEARNED
Activity was incorporated into 2016–2.
- e. POTENTIAL BENEFITS OUTSIDE OF CURRENT MTW FLEXIBILITIES
Please see results for Activity 2016–2.
- f. YEARLY OUTCOMES
Please see results for Activity 2016–2.
- g. ADDITIONAL EXPLANATIONS OF OUTCOMES
Please see results for Activity 2016–2.

ACTIVITY 2012–3

Activity 2012–3, Rent Simplification for family households, was approved and implemented in 2012. All elements of this activity were incorporated into Activity 2016–1.

- a. YEAR APPROVED
2012
- b. YEAR IMPLEMENTED (IF APPLICABLE)
2012
- c. YEAR ACTIVITY CLOSED
2016
- d. FINAL OUTCOME AND LESSONS LEARNED
Activity was incorporated into 2016–1.
- e. POTENTIAL BENEFITS OUTSIDE OF CURRENT MTW FLEXIBILITIES
Please see results for Activity 2016–1.
- f. YEARLY OUTCOMES
Please see results for Activity 2016–1.
- g. ADDITIONAL EXPLANATIONS OF OUTCOMES
Please see results for Activity 2016–1.

ACTIVITY 2012–7

MTW Activity 2012 – 7, Implement a Landlord Self–Certification System for HQS Inspections in the Voucher Program, was never implemented. The activity was re–written and approved in the 2013 MTW Annual Plan under Activity 2013 – 1. This activity allows the inspection cycle to follow the recertification schedule.

- a. YEAR APPROVED
2012

b. YEAR IMPLEMENTED (IF APPLICABLE)

This activity was never implemented.

c. YEAR ACTIVITY CLOSED

2012

d. FINAL OUTCOME AND LESSONS LEARNED

N/A

e. POTENTIAL BENEFITS OUTSIDE OF CURRENT MTW FLEXIBILITIES

N/A

f. YEARLY OUTCOMES

N/A

g. ADDITIONAL EXPLANATIONS OF OUTCOMES

N/A

ACTIVITY 2014–1

MTW Activity 2014 – 1, Rent Reform for Housing Choice Work-able Families was implemented in 2014, and amended under Activity 2016–1. All aspects of the original activity were included in the 2016 Activity.

a. YEAR APPROVED

2014

b. YEAR IMPLEMENTED (IF APPLICABLE)

2014

c. YEAR ACTIVITY CLOSED

2016

d. FINAL OUTCOME AND LESSONS LEARNED

Activity was incorporated into 2016–1.

e. POTENTIAL BENEFITS OUTSIDE OF CURRENT MTW FLEXIBILITIES

Please see results for Activity 2016–1.

f. YEARLY OUTCOMES

Please see results for Activity 2016–1.

g. ADDITIONAL EXPLANATIONS OF OUTCOMES

Please see results for Activity 2016–1.

ACTIVITY 2014–2

MTW Activity 2014–2: Rent Reform for Public Housing Work-able Families was not implemented, nor will it be. With the conversion of six of the eight public housing sites under Section 18 disposition or RAD in 2015, the households in the converted sites were transitioned to the voucher program. This activity was not implemented for the remaining public housing units.

a. YEAR APPROVED

2014

b. YEAR IMPLEMENTED (IF APPLICABLE)

This activity was never implemented.

c. YEAR ACTIVITY CLOSED

N/A

d. FINAL OUTCOME AND LESSONS LEARNED

N/A

e. POTENTIAL BENEFITS OUTSIDE OF CURRENT MTW FLEXIBILITIES

N/A

f. YEARLY OUTCOMES

N/A

g. ADDITIONAL EXPLANATIONS OF OUTCOMES

N/A

ACTIVITY 2014–3

MTW Activity 2014 – 3, Rent Reform for elderly and disabled households was amended under Activity 2014–3. Further changes were made to the rent reform in 2016 and all aspects of this activity were incorporated into Activity 2016–2.

a. YEAR APPROVED

2014

b. YEAR IMPLEMENTED (IF APPLICABLE)

2014

c. YEAR ACTIVITY CLOSED

2016

d. FINAL OUTCOME AND LESSONS LEARNED

Activity was incorporated into 2016–2.

e. POTENTIAL BENEFITS OUTSIDE OF CURRENT MTW FLEXIBILITIES

Please see results for Activity 2016–2.

f. YEARLY OUTCOMES

Please see results for Activity 2016–2.

g. ADDITIONAL EXPLANATIONS OF OUTCOMES

Please see results for Activity 2016–2.

V. SOURCES AND USES OF FUNDS

A. ACTUAL SOURCES AND USES OF MTW FUNDING FOR THE FISCAL YEAR

Please see table below.

B. LOCAL ASSET MANAGEMENT PLAN

Please see table on following page.

A. MTW Report: Sources and Uses of MTW Funds		
<table border="1"><thead><tr><th>Actual Sources and Uses of MTW Funding for the Fiscal Year</th></tr></thead><tbody><tr><td>PHAs shall submit their unaudited and audited information in the prescribed FDS format through the Financial Assessment System - PHA (FASPHA), or its successor system</td></tr></tbody></table>	Actual Sources and Uses of MTW Funding for the Fiscal Year	PHAs shall submit their unaudited and audited information in the prescribed FDS format through the Financial Assessment System - PHA (FASPHA), or its successor system
Actual Sources and Uses of MTW Funding for the Fiscal Year		
PHAs shall submit their unaudited and audited information in the prescribed FDS format through the Financial Assessment System - PHA (FASPHA), or its successor system		
<table border="1"><thead><tr><th>Describe the Activities that Used Only MTW Single Fund Flexibility</th></tr></thead><tbody><tr><td>Activity 2013-4 allows for use of Replacement Housing Factor Funds for other affordable housing. Activity 2015-1 allows for MTW funds to be used on other local, non-traditional affordable housing.</td></tr></tbody></table>	Describe the Activities that Used Only MTW Single Fund Flexibility	Activity 2013-4 allows for use of Replacement Housing Factor Funds for other affordable housing. Activity 2015-1 allows for MTW funds to be used on other local, non-traditional affordable housing.
Describe the Activities that Used Only MTW Single Fund Flexibility		
Activity 2013-4 allows for use of Replacement Housing Factor Funds for other affordable housing. Activity 2015-1 allows for MTW funds to be used on other local, non-traditional affordable housing.		

B. MTW Report: Local Asset Management Plan

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

Yes

or

No

Has the PHA implemented a local asset management plan (LAMP)?

No

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

Has the PHA provided a LAMP in the appendix?

or

No

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 Funds
CFP and RHF	BHP plans to use \$535,912 to finance the acquisition of the Boulders.	0	\$535,912
Total Obligated or Committed Funds:		0	0

N/A

***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.*

VI. ADMINISTRATIVE

A. HUD REVIEWS, AUDITS OR PHYSICAL INSPECTIONS THAT REQUIRE AGENCY ACTION

BHP was chosen for a site visit by the Government Accountability Office in March 2017. The report has been released, no mention of any individual agency is made. BHP hosted the MTW and Denver Field Office for a site visit in April 2017. There were no findings that required action by BHP.

B. RESULTS OF LATEST AGENCY-DIRECTED EVALUATIONS

BHP worked in partnership with the University of Colorado (CU) to develop the rent-controlled study to evaluate the effects of the flat tier rent reform structure that was implemented in 2014. The baseline survey was administered at the time of mass recertification for the Housing Choice Voucher Program work-able households, and in the early summer for the Public Housing work-able households. The 2014 Baseline Survey of Work-able Households in the Public Housing and Housing Choice Voucher Programs was included in the 2014 Annual Report. The survey was given to all Public Housing households in the summer of 2015 to coincide with the conversion of 85% of the public housing units. The results of this report were shared in the 2015 MTW Annual Report. The report that begins on the next page details the results of the 2017 MTW Survey that was administered at the time of recertification for the converted public housing work-able households.

C. CERTIFICATION THAT AGENCY HAS MET THE THREE STATUTORY REQUIREMENTS

Boulder Housing Partners hereby certifies that the three statutory requirements below have been met:

- assuring that at least 75 percent of the families assisted by the Agency are very low-income families;
- continuing to assist substantially the same total number of eligible low-income families as would have been served had the amounts not been combined; and
- 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

REPORT ON THE 2017 SURVEY OF WORK-ABLE PUBLIC HOUSING HOUSEHOLDS

IN

BOULDER HOUSING PARTNERS' MOVING TO WORK PROGRAM

Prepared for Boulder Housing Partners by:

Willem van Vliet—

Center for Community Engagement, Design and Research

University of Colorado, Boulder

with assistance by Anirban Pal

February 7, 2018



**REPORT ON THE 2017 SURVEY OF WORK-ABLE PUBLIC HOUSING FAMILIES IN
BOULDER HOUSING PARTNERS' MOVING TO WORK PROGRAM**

- 1. Background: 2014 baseline survey of work-able households**
- 2. Evaluation of BHP's MTW-Program: Public Housing Families, Year Three.**
- 3. Findings**
 - 3.1. Household Characteristics**
 - 3.2. Survey Results**
 - 3.2.1. Comparing the Total of Work-Able Public Housing Families in 2014, 2015, and 2017**
 - 3.2.2. The 2014, 2015 and 2017 Continuing Core Group**
 - 3.2.3. The 2015-2017 Continuing Core Group, Newcomers and Out-movers**
 - 3.2.4. Summary Comparison**
 - 3.3. Changes Among Individual Families in the Continuing Core Group, 2015-2017**
- 4. Conclusion**

**REPORT ON THE 2017 SURVEY OF WORK-ABLE PUBLIC HOUSING HOUSEHOLDS IN
BOULDER HOUSING PARTNERS' MOVING TO WORK PROGRAM**

1. Background: 2014 baseline survey of work-able households¹

As part of its evaluation of its Moving to Work (MTW) program, Boulder Housing Partners (BHP) is collaborating with the Center for Community Engagement, Design and Research (CEDaR) at the University of Colorado. The Center, which has extensive experience in evaluation and assessment, advised BHP on the research design in which eligible households are compared with themselves through data collected at regular intervals over an extended period.

The limited number of work-able BHP-households in both Housing Choice (HC) and public housing prevent a research design in which one would compare households in a “control group” with households in a “treatment group,” targeted by interventions intended to increase their self-sufficiency. Therefore, the BHP evaluation compares households with themselves over time in order to ascertain whether changes take place, and if so, which ones and how any observed changes may be linked to interventions that have happened in the interim. To this end, BHP envisions long-term collection of data on all its work-able households. This periodic gathering of household information makes it possible to monitor resident experiences and make programmatic adjustments as deemed appropriate to support vulnerable residents in particular.

In spring and summer of 2014, BHP gathered baseline data that form a reference point for future years. The baseline data were collected through a self-administered survey. Development of the survey questionnaire involved extensive input from BHP staff,

¹ See explanatory notes on p. 35.

focus groups with residents (conducted separately in English and Spanish), and a pilot that resulted in final revision of the instrument.

The baseline survey was distributed in April 2014 to all work-able HC households, in English as well as Spanish, as part of the recertification process. After two follow-up requests, the final response rate was 95%. In May 2014, all work-able site-based public housing (PH) households also received the questionnaire by mail, with two follow-up requests. Considering a relatively low response rate after the initial mailing, BHP offered an incentive in the form of \$100 gift certificates awarded to five households randomly selected from all those participating in the survey, resulting in a final response rate of 68%. These are high response rates relative to other studies of public housing residents.

The HC- and PH-populations were distinctly different. In the survey, 93% in PH identified with Hispanic/Latino vs. 47% in HC. Relatedly, English was the primary language spoken at home for only 8% in PH, vs. 68% in HC. Additional data from BHP files also showed that 84% of the households in PH had at least one member of the family who was not legally able to receive housing assistance, versus 25% of the households in HC. The survey findings related to self-sufficiency often reflected these differences.

The questionnaire was completed by the head of household, taking 20-30 minutes. The questions aimed to establish how respondents place themselves or their households on a self-sufficiency scale in ten domains: housing, employment, income, food, transportation, child care, support networks, legal matters, health, and education.

Other questions asked about barriers that hinder households' progress in each self-sufficiency domain related to, for example, income, skills, child care, and transportation. In addition, respondents were asked to provide some household background information (e.g., primary language, health insurance coverage).

The first MTW report for BHP’s public housing residents (January 2015) introduced baseline data. Against this background, in 2015 BHP conducted a second-year survey among its work-able PH households.² For reasons of administrative efficiency and to maximize the response rate, the survey was integrated with the recertification process. This linkage proved to be very effective: *the response rate rose from an already very respectable 68% in the 2014 survey to 97% in 2015*. The second PH MTW report (February 2016) presented findings based on the first follow-up survey (conducted in 2015), including a comparison of households that had moved out after the 2015 survey, households that had moved in after the 2015 survey, and households making up the continuing core group.³ The current report includes findings based on the third MTW survey among work-able PH families, conducted in 2017.

2. Evaluation of BHP’s MTW-Program: Public Housing Families, Year Three.

From 2014 to 2015, the absolute number of households participating in the survey increased from 84 to 115 of whom 71 participated in both of the first two surveys. In 2017, the number of households participating in the third survey declined to 104, but the response rate remained very high (90%, compared with 98% in 2015). Of those 104 households, 79 completed both the 2015 and the 2017 surveys, referred to as the “2015-2017 continuing core group” (see Table 1). A total of 50 households completed all three of the surveys conducted to date. This report refers to these 50 households as the “2014-2017 continuing core group.” They comprise 60% of the 84 work-able PH families with children who participated in the first survey in 2014. The 27 families that moved out of BHP housing since 2015 were replaced by 27 new families. This report will show that the profile of these newcomers is markedly different from the rest of the PH MTW population.

This report first examines outcomes for all the households surveyed in 2014, 2015, and 2017, thus comparing total household populations in each year with each other (see Fig. 1).

² The follow-up survey among HC households took place in Spring 2016, resulting in a report completed in February 2017.

³ Separate reports were prepared for the Housing Choice households in the MTW program.

The populations surveyed in 2014 and 2015 included households that moved out before the 2017 survey (attrition), while the population surveyed in 2017 includes households who either moved into PH after the 2014 survey or lived in PH in 2014 or 2015, but did not then participate in either one or both of the surveys conducted in those years (hence no comparative data for

Table 1 – Work-able Households in BHP Public Housing and their Participation in the 2014, 2015, and 2017 Surveys

	2014	2015	2017
PH households participating in survey	84	113	104
PH households in BHP administrative data set	130	115	115
Survey response rate	65%	98%	90%
PH households participating in <u>both 2015 and 2017</u> survey		79	
PH households participating in 2014, 2015, and 2017 survey	50		
PH households that moved out since 2015 survey (<u>recent attrition</u>)			27

PH households that moved out since 2014 survey (<u>total</u> attrition)			51
PH households that moved in since 2014 survey		37	
PH households that moved in since 2015 survey			27

these groups of households exist).⁴ In other words, the 2014, 2015, and 2017 populations for this aggregate comparison are not completely identical. However, the comparison is still valuable because it offers a picture of how the total of work-able PH families in each year was doing in each of the ten self-sufficiency domains.

⁴ Likewise, the population surveyed in 2014 included households that moved out before the 2015 survey (attrition) while the population surveyed in 2015 includes households who either moved into PH after the 2014 survey or lived in PH in 2014 but did not then participate in the survey.

Second, to gain better insights into how the PH families in the MTW-program have fared over time, *this report also examines changes concerning the continuing core group 2014-2017* (N = 50, down from 79 in 2015, owing to attrition resulting from move outs and nonresponse).

Third, this report *compares the 2015-2017 continuing core group with households that moved out of PH as well as the new households that moved into PH after the*

Finally, this report *presents findings on the last two years by individual families that group for 2015-2017.*

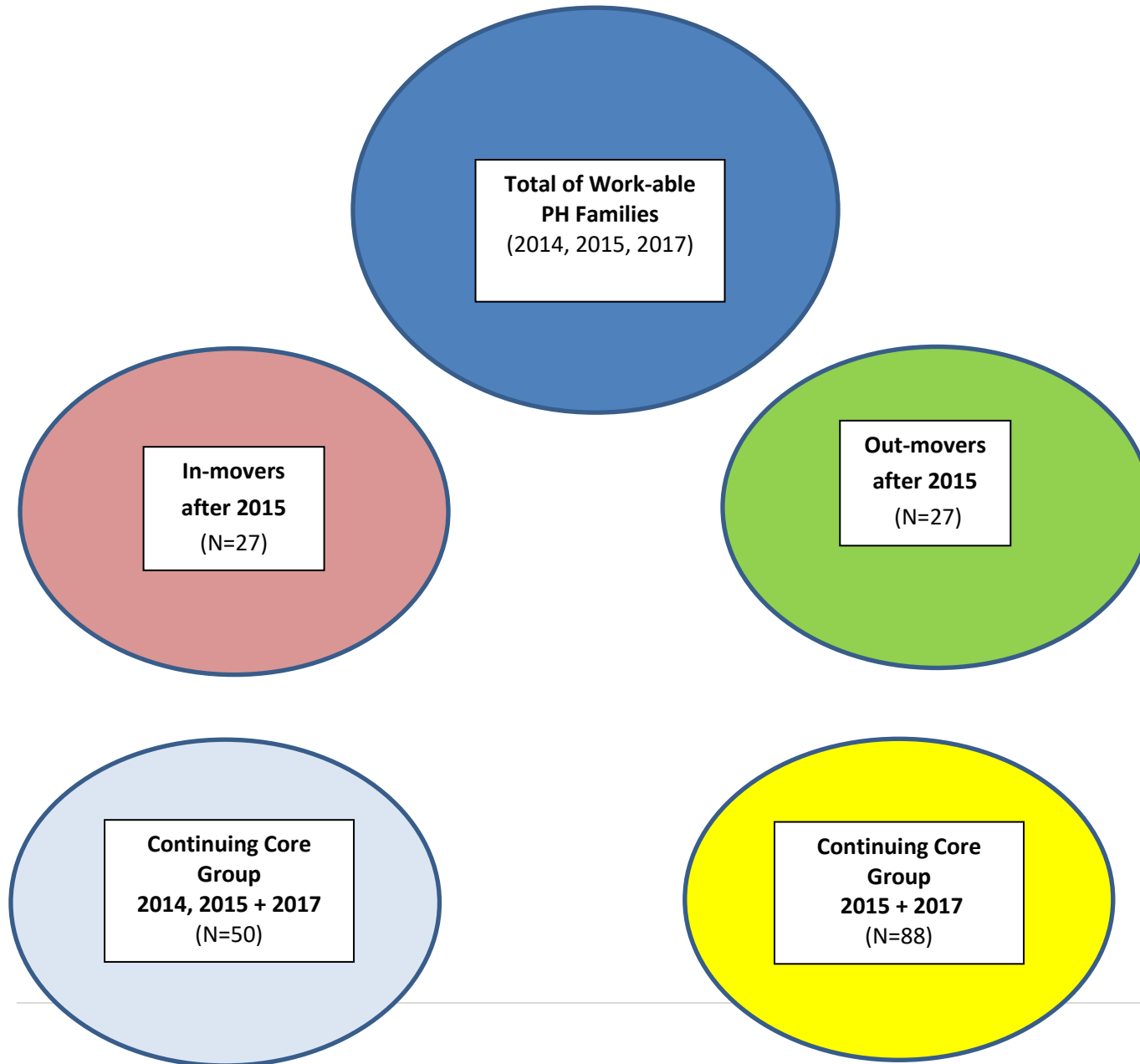
Clarification of terms:

- Continuing Core Group = households who participated in the 2014, 2015 and the 2017 survey, as specified.
- Out-Movers = Households who completed the second survey in 2015 but moved out *before* the third survey in 2017.
- In-Movers = Households that completed the third survey in 2017 but moved in *after* the second survey in 2015.

2015 survey (see Fig. 1).

changes experienced during make up the continuing core

Figure 1 – Groups of work-able PH families included in this report

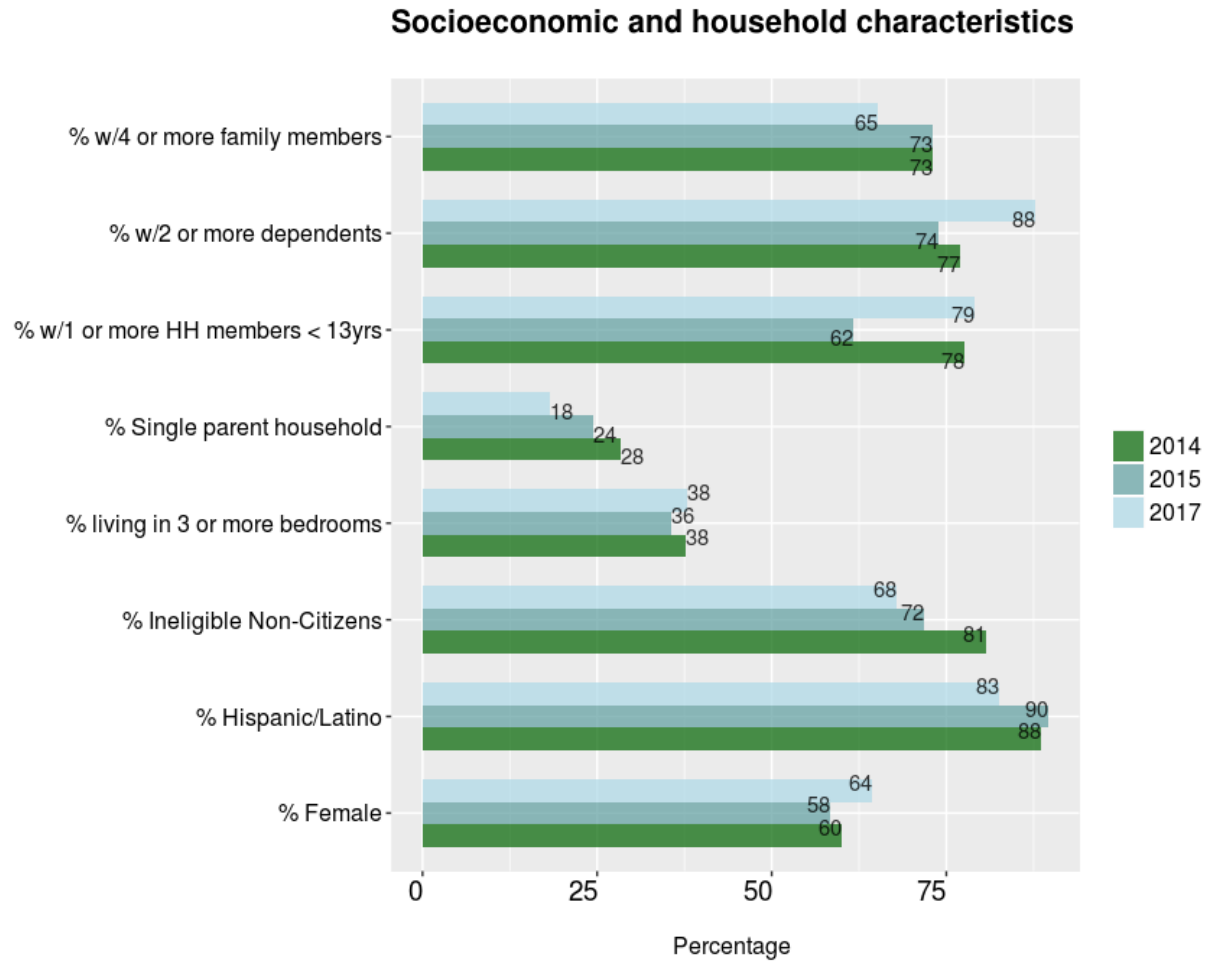


3. Findings

3.1. Household Characteristics

Based on BHP’s administrative files on PH work-able families, *we see clear changes in key variables related to household composition. Specifically, during the last two years there was an increase in the proportion of families with two or more dependents and with one or more members younger than 13, while there was a decrease in the proportion of single-parent families as well as families with ineligible non-citizens. In 2017, there were fewer Hispanic-Latino/a household heads and more who were female* (Figure 2). (In 2016, BHP implemented the Bringing School Home Program at these sites, which gives preference to families have at least one child under the age of six for admission.) These changes primarily reflect the rather different profile of the families who moved in after the 2015 survey (see Section 3.2.3. further down in this report, which will compare newcomers and out-movers with the continuing core group).

Figure 2 – Comparison of Work-able PH Family Characteristics: 2014, 2015 and 2017



3.2. Survey Results

3.2.1. Comparing the Total of Work-Able Public Housing Families in 2014, 2015, and 2017

In general, the work-able families living in BHP housing in 2017 were not much different from those who lived there two and three years earlier. This section highlights some exceptions to this pattern, focusing chiefly on changes since 2015. Appendix A contains the full survey results and is available upon request.

Changes since 2015 tend to suggest reduced frequency of barriers to greater self-sufficiency in several domains. For example, barriers to employment declined across the board, which is in line with a drop in the proportion of those who were unemployed from 21% in 2015 to 12% in 2017. Likewise, most barriers to income declined, as was also the case for transportation and education. For the latter, the largest barrier reductions were in lack of English proficiency (from 75% down to 60%), immigration status (from 65% to 53%), not knowing which type of education would help with getting a better job (from 57% to 43%), and no place to study at home (from 42% to 25%). Housing barriers that declined are not having a paying job (from 58% to 44%) and not having skills (from 62% to 45%). All but one of the income burdens declined as well, usually not by much, but in a consistent pattern. Lastly, in 2017 families assessed their self-sufficiency in many domains -- notably education, support networks and child care -- more positively than in 2015.

A word of caution. The numbers are small, so sizeable proportional changes may result from relatively minor shifts, and the individual results are less informative than more general patterns emerging from them. Further, as noted, the findings presented above pertain to the *total* PH populations in 2014, 2015 and 2017. *The composition of the PH population in each year is somewhat different because some families have moved out, while others have moved in. The following section presents results for the 2014-2017 continuing core group only, that is, families who completed the survey in 2014, 2015 and 2017. It enables comparisons that*

track changes in the self-sufficiency of the same population during this three-year period. These findings show how the *whole* of this population has changed. A later section of this report will show how *individual* households have fared.

3.2.2. The Continuing Core Group of Work-Able Public Housing Families: 2014, 2015 and 2017

Of the 84 families that completed the 2014 self-sufficiency survey, 50 also completed the 2015 and the 2017 surveys, giving three data points for monitoring changes. This section of the report summarizes the most salient changes seen during this period, with an emphasis on the last two years. Appendix B presents the full findings for this continuing core group across all three years and is available upon request.

In the housing domain, all barriers declined in significance in 2017 compared to 2015, with one exception: the high cost of housing held steady, mentioned by 90% of all families and topping the list. The largest changes were in having high basic expenses (down from 93% in 2015 to 77% in 2017), not having a paying job (from 63% in 2015 down to 48% in 2017), and not having skills (from 55% to 43%).

Regarding employment, almost all barriers declined in importance between 2015 and 2017, with fewer families mentioning lack of education or skills (down 13%), a tight job market (down 15%), not knowing how to find a job (down 15%), and child care responsibilities (down 17%). Given the lesser significance of many barriers to employment, fewer respondents were unemployed (down from 19% to 12%) and fewer of them stated that they wanted or needed more working hours, while more of them indicated that their skills qualified them for a better job.

In line with a generally more favorable employment situation, all burdens on income declined, many of them significantly. Thus, in 2017 fewer families mentioned that it was hard to have money for utilities (down 21%), child care (down 25%), debts (down 31%), and savings (down 19%). These responses are consistent with income data from BHP's administrative files, which show that median

income for the continuing core group has risen significantly from \$17,388 in 2014 to \$22,815 in 2015 and to \$27,223 in 2017. Not surprisingly, fewer families also reported having run out of income in the last three months, steadily declining from 60% in 2014, to 45% in 2015, to 29% in 2017.

Fewer families reported food sources other than income, problems getting food, or skipping a meal in the last three months. The proportion mentioning the use of food banks dropped from 73% to 48%. Lack of income as a barrier to food self-sufficiency went down from 67% to 43% and lack of knowledge to find nutritious food declined from 29% to 6%.

Dissatisfaction with transportation decreased, including bicycle, car pool, own car, bus, and walking. Barriers to greater transportation self-sufficiency decreased across the board, with those saying they do not have a car declining from 50% to 19%. However, gas costs became a barrier for more families, mentioned by 48%, up from 33%. It may be that the costs of gas became more of an issue because more families owned a car, facing an expense they did not previously have.

Regarding child care, the survey findings do not show drastic changes. A majority reports its arrangements as being sufficient and satisfaction with accessibility and quality seems to have increased, but the numbers are very small and must be interpreted cautiously.

There were also only minor changes related to support networks, with very small but consistent increases in the number of families that say during the last three months they did not receive support from sources such as churches, local support groups, friends, neighbors, or family. It may be that families experienced less need for support because of improved employment and income conditions, noted above. Participation in various government assistance programs fluctuated just slightly, with small decreases in SNAP, LEAP, and CCAP. Not knowing how to find community organizations also became somewhat less of a barrier (down from 37% to 22%).

The numbers concerning legal issues are too small for meaningful interpretation. The number of families dealing with such issues seems small enough that BHP could target them for individual consultation.

In the health domain the data show slight improvements. Those who reported that they had a medical problem during the last year and did not go to a doctor decreased from 17% in 2015 to 8% in 2017.

Barriers to education remained virtually unchanged, but a notable change was the drop in the number that stated that they didn't know which type of education would help them get a better job, which went down from 59% in 2015 to 32% in 2017.

Finally, as in earlier years, the 2017 survey asked respondents to assess their situation in each of the self-sufficiency domains. The findings show that the most problematic areas remain immigration status and income, but they also show fewer unfavorable assessments in every area. The biggest improvements were in education, childcare and transportation.

3.2.3. The 2015-2017 Continuing Core Group, Newcomers and Out-movers

The previous report on work-able public housing families (2016) included a comparison of the then continuing core group with newcomers and out-movers. It found that:

1. Households that moved out after the 2014 survey:
 - a. Were in similar or better health than the core group;
 - b. Had a similar or better employment situation than the core group; and
 - c. Had a more favorable immigration status than the core group.
2. New households that moved in after the 2014 survey, compared with the other three groups:
 - a. Had a younger head of household;
 - b. Were in better health;

- c. Had a better employment situation; and
- d. Had a more favorable immigration status.

These results suggested the possibility that the households that moved in as well as those that moved out represented a positive selection of households whose situation was somewhat better than that of households who stayed put.

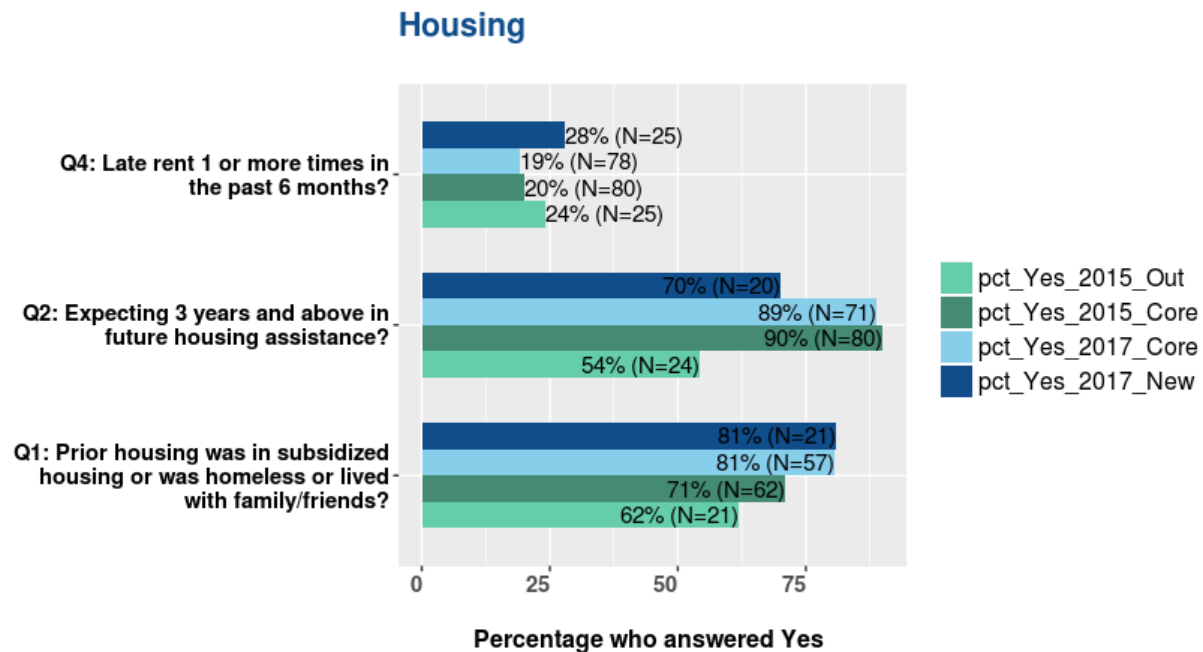
The additional round of data collection in 2017 permits a further examination of this possibility. It compares four groups:

1. Out-movers (27 families that moved out after the 2015 survey);
2. Newcomers (27 families that moved in after the 2015 survey);
3. 2015 core (88 families of whom 87 completed the 2015 survey); and
4. 2017 core (88 families of whom 79 completed the 2017 survey).

The rest of this section presents main findings for each of the self-sufficiency domains. Appendix C contains the full findings of this comparative analysis of the 2015-2017 continuing core group, newcomers and out-movers and is available upon request.

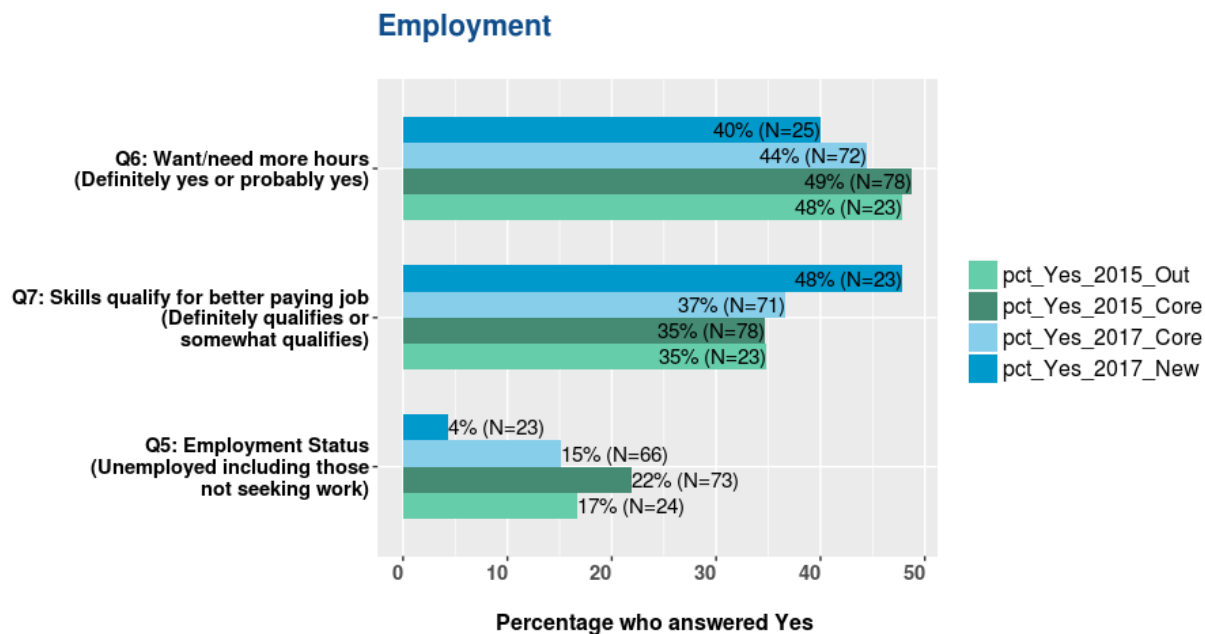
Regarding housing, the findings that stand out most relate to the out-movers. In 2015, 54% of them indicated that they expected to remain in BHP housing for 3 years or more, in contrast some 90% of the core group in both 2015 and 2017, with the 2017 newcomers in between at 70%. In other words, *actual move-outs in 2017 reflect expectations stated in 2015*. Another finding shows that the prior housing situation of out-movers was less often subsidized, living with family or friends or homelessness (Figure 3).

Figure 3 – Selected Housing Characteristics of Work-able PH Families: 2014, 2015 and 2017



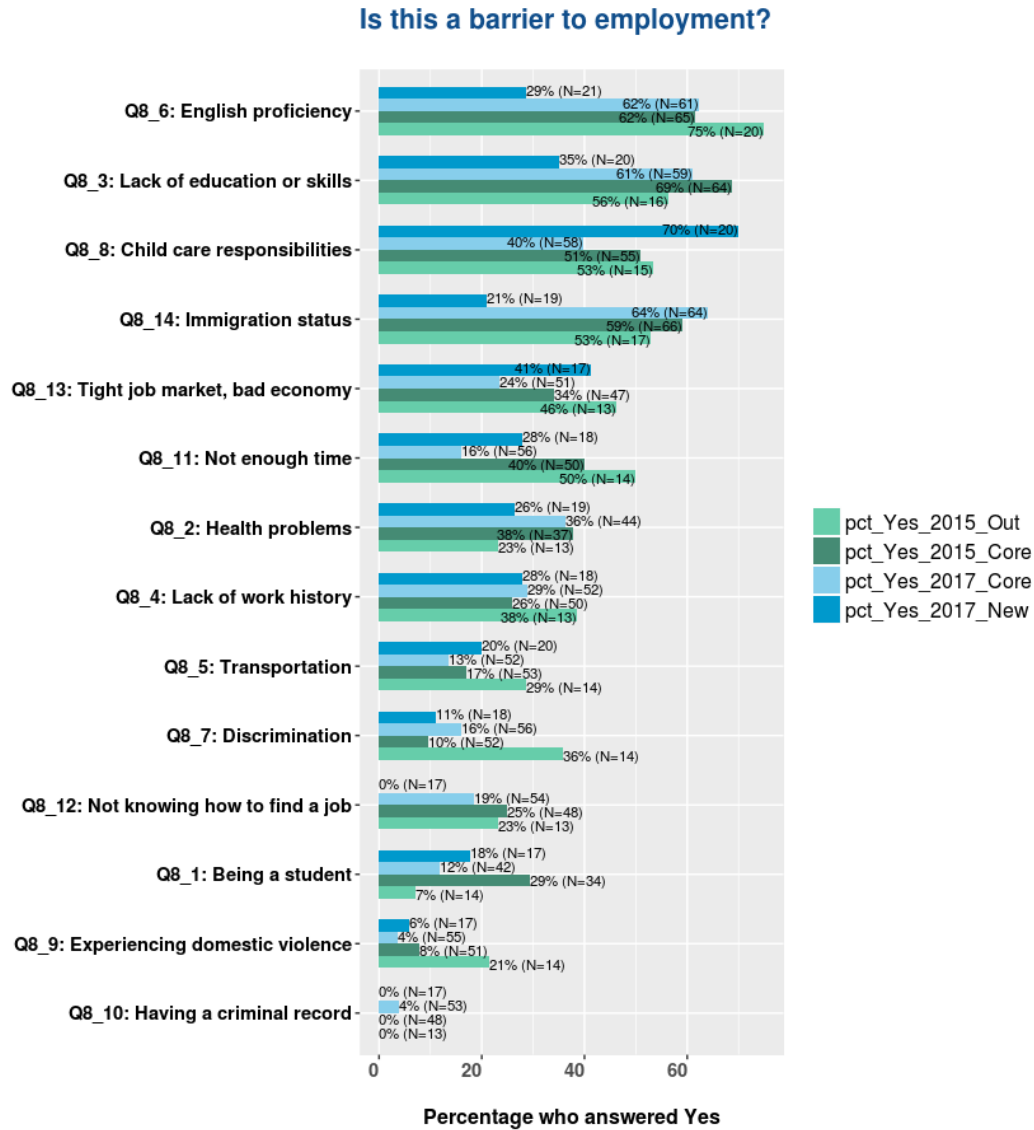
Regarding employment, it is the newcomers who stand out. Many fewer of them (4%) are unemployed and more of them say that their skills qualify them for a better paying job (48%). See Fig. 4.

Figure 4 –Employment Among Work-able PH Families: 2014, 2015 and 2017



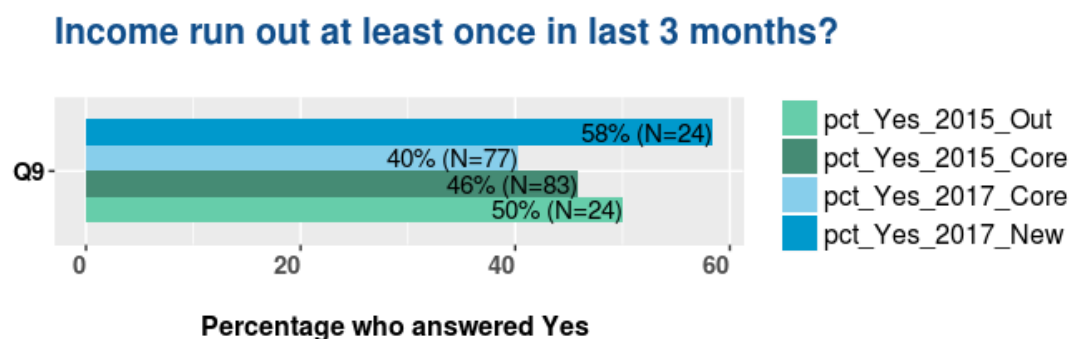
Even larger differences exist regarding barriers to greater employment self-sufficiency. Newcomers report fewer problems regarding English proficiency, lack of education or skills, and immigration status. For them, by far the greatest obstacle is child care, mentioned by 70% (See Fig. 5). Out-movers indicate a different set of primary hurdles: lack of English proficiency (75%), not enough time (50%), lack of work history (38%), discrimination (36%), and domestic violence (21%). Generally, the 2015 and 2017 core groups fall somewhere in between the newcomers and the out-movers, with significant employment barriers being lack of education and skills as well as immigration status (see Fig. 5).

Figure 5 – Barriers to Employment Among Work-able PH Families: 2014, 2015 and 2017



In regard to *income*, newcomers again stand out by having run out of income more often during the last 3 months (58%), see Figure 6. They also cite housing costs as an income burden more often than any other group (32%). BHP administrative data show that in 2017 newcomers had a much lower median income (\$22,009) than other work-able PH families (\$26,887), no doubt related to the much younger median age of household (30 vs. 41). Younger people tend to have lower incomes. Newcomers also had a lower median monthly rent (\$670) than 2017 core group families (\$836), giving them a rent burden of 36.5% vs. 37.3% for the 2017 core group. In 2015, out-movers had a higher median income than the core group that year (\$23,920 vs. \$21,968) and they also had a higher median monthly rent (\$621 vs. \$591), so that their rent burden before moving out was 31.2% vs. 32.3% for the 2015 core group.

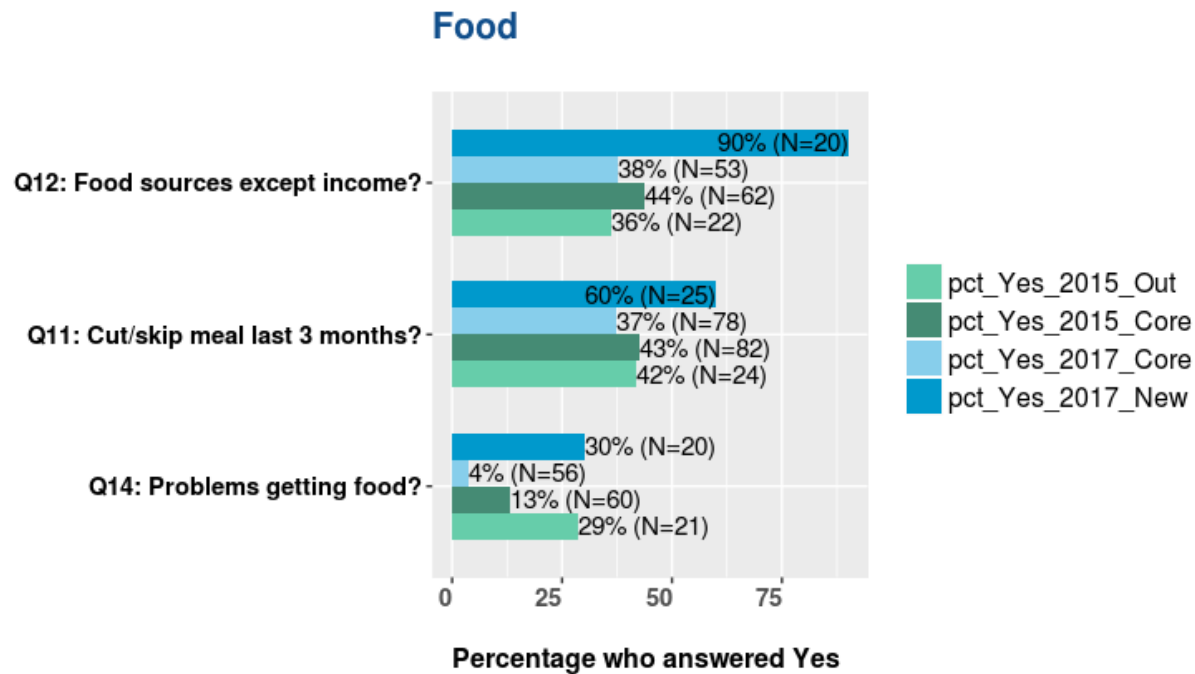
Figure 6 - Work-Able PH Families that Ran Out of Money At Least Once in Last Three months:



These results indicate that, compared with the core group, the out-movers since 2015 were better off in terms of income, whereas the newcomers in this regard were worse off. This finding is consistent with the picture of two years ago, when out-movers also formed a positive selection, suggesting that a better income situation contributes to moving out of BHP housing, with other factors possibly being in play as well.

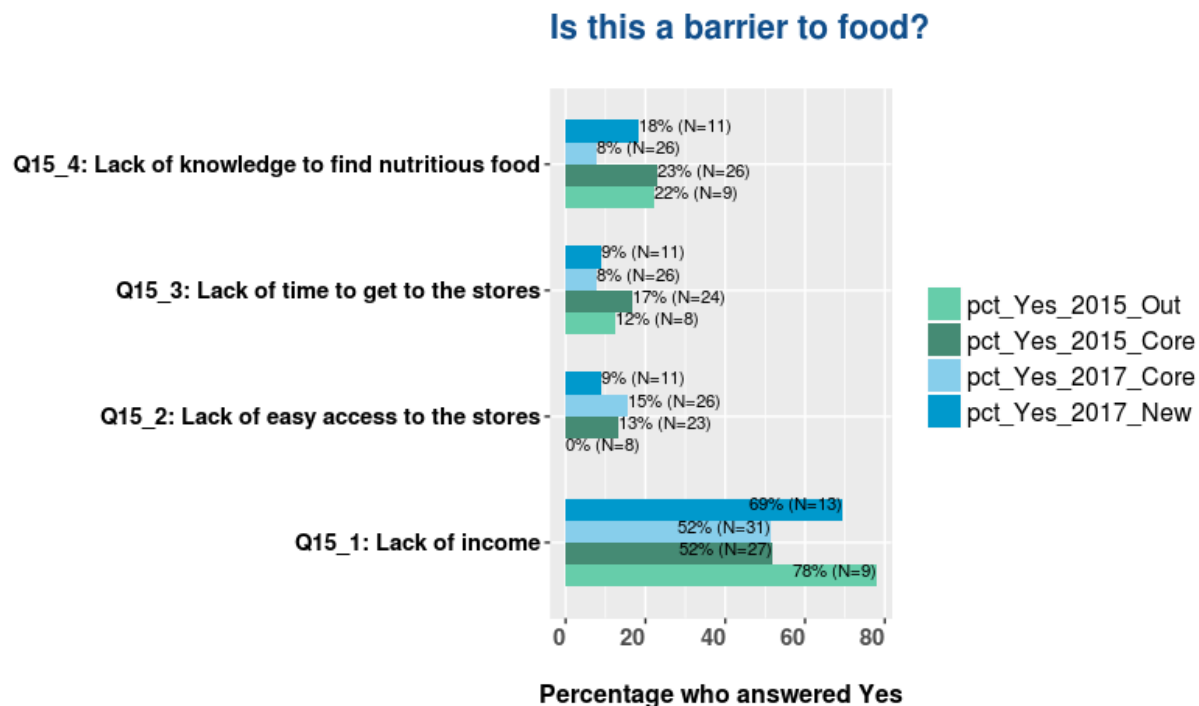
As one would expect in light of their less favorable income situation, newcomers much more often rely on food sources other than income (90%). They also say more often that they have skipped or cut on meals in the last 3 months (60%). One-third of them indicate having problems getting food, as do the out-movers (see Fig. 7).

Figure 7 –Food Situation Among Work-able PH Families: 2014, 2015 and 2017



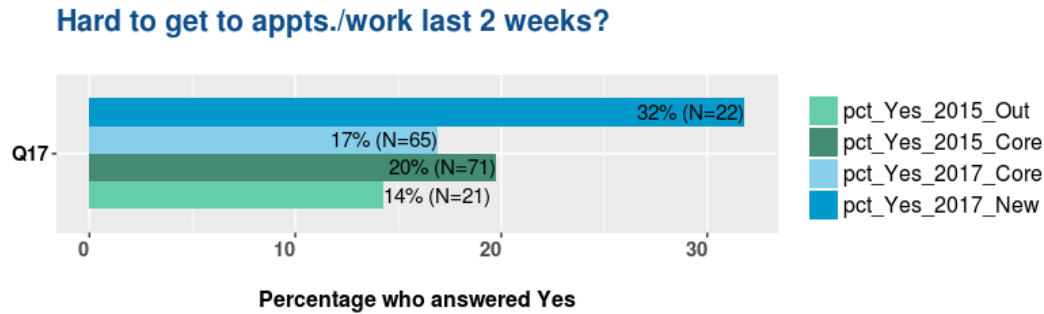
By far the biggest barrier to greater food self-sufficiency is lack of income, mentioned by 69% of newcomers and 78% of out-movers (see Figure 8).

Figure 8 – Barriers to Food Self-Sufficiency Among Work-able PH Families: 2014, 2015 and 2017



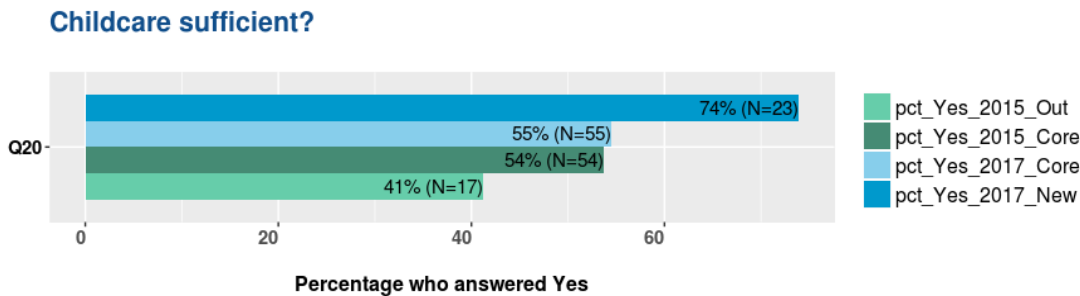
With respect to transportation, 32% of the newcomers indicate that it was hard to get to work or appointments in the last 2 weeks, more than any of the other groups (Fig. 9). Satisfaction with different forms of transportation is difficult to gauge because the numbers are very small, but the findings give the impression that newcomers are less satisfied with bus services. The same observation applies to transportation barriers, although the costs of gas and bus fares appear to remain the biggest hurdles.

Figure 9 – PH Household Heads Who Found It Hard to Get to Appointments or Work in the Last Two Weeks: 2014, 2015, and 2017



More than any other group, newcomers report having at least one child under 13 (96%), reflecting BHP’s introduction of the Bringing School Home Program. Of them, 74% reported “sufficient” *child care*, more than any other group (Fig. 10). They tend to be more satisfied with accessibility, affordability and quality of child care, and less often said that affordability is a barrier for them.

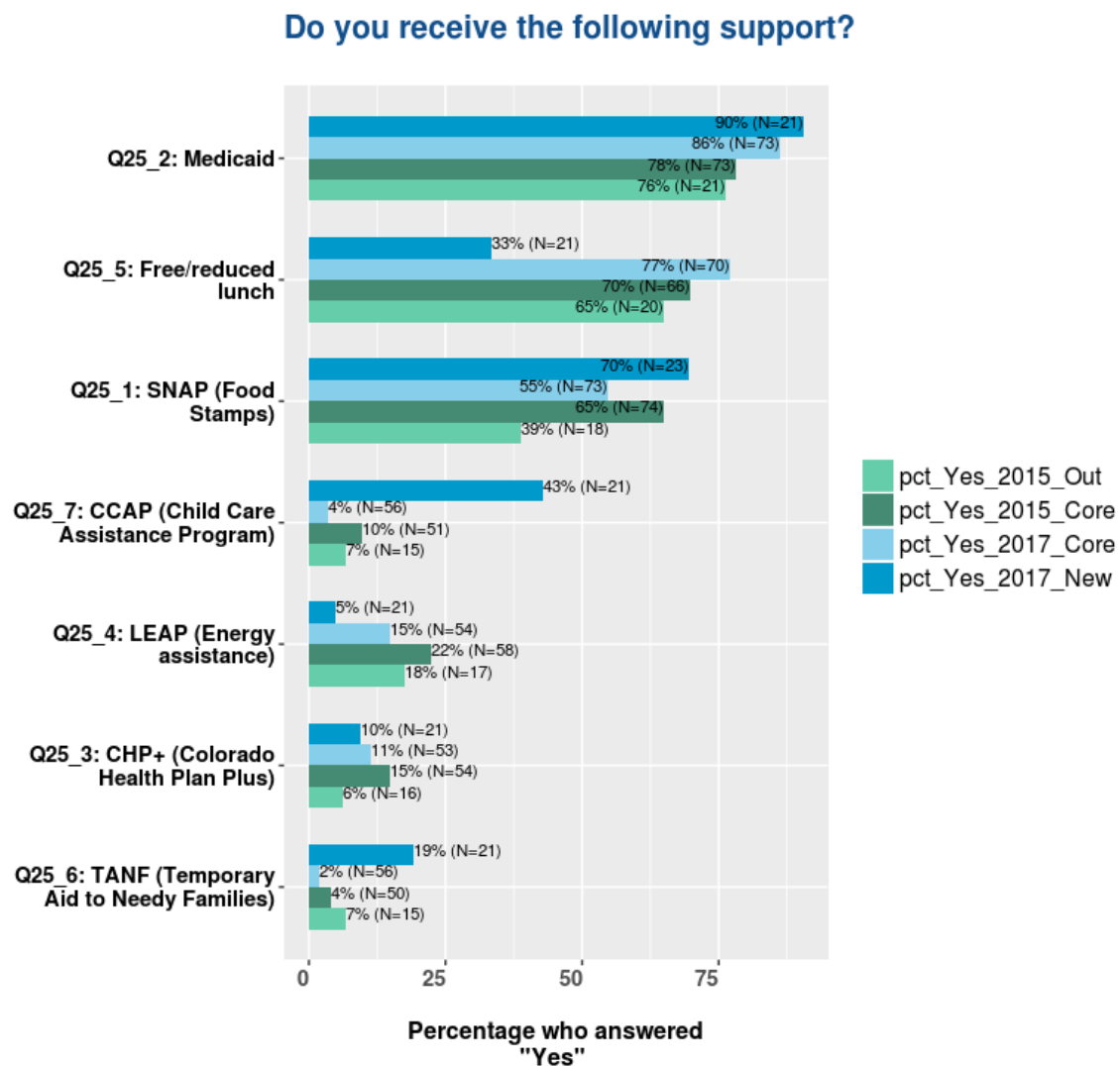
Figure 10 – PH Household Heads Who Reported that Child Care Was Sufficient: 2014, 2015, and 2017



Newcomer families more often than other groups appear to have gotten help during the last 3 months from the two most common *support networks*: family (41%) and charitable organizations (36%). The most common barriers to networking are lack of time for

social events, mentioned most frequently by out-movers (61%) and newcomers (47%). Not knowing how to find community organizations is also often mentioned by these two groups, but less so by the continuing 2015-2017 core group. Medicaid is the government assistance program most often used by all groups, followed by food support programs. Free or reduced cost lunch programs are mentioned less often by newcomers, likely because fewer of them have school age children. Participation in CCAP, on the other hand, is much higher among newcomers (Fig. 11).

Figure 11 – Types of Government Support Received by Work-Able PH Families: 2014, 2015, 2017

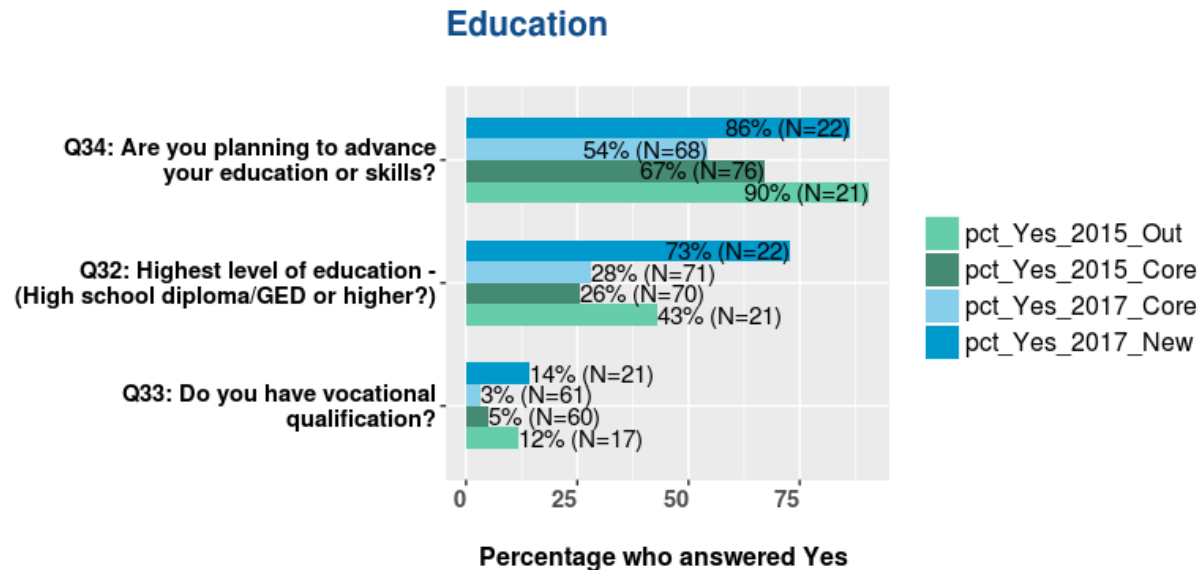


In *legal matters*, the numbers are extremely small. Those most affected appear to be the families that moved out. Given how few families report problems in this area, BHP may find it possible to work directly with those needing assistance.

Regarding *health*, there is little difference between the groups, except that more newcomer families have all members covered under health insurance, although 43% still report having at least one family members not covered, compared with 70% or more among the core group and out-movers.

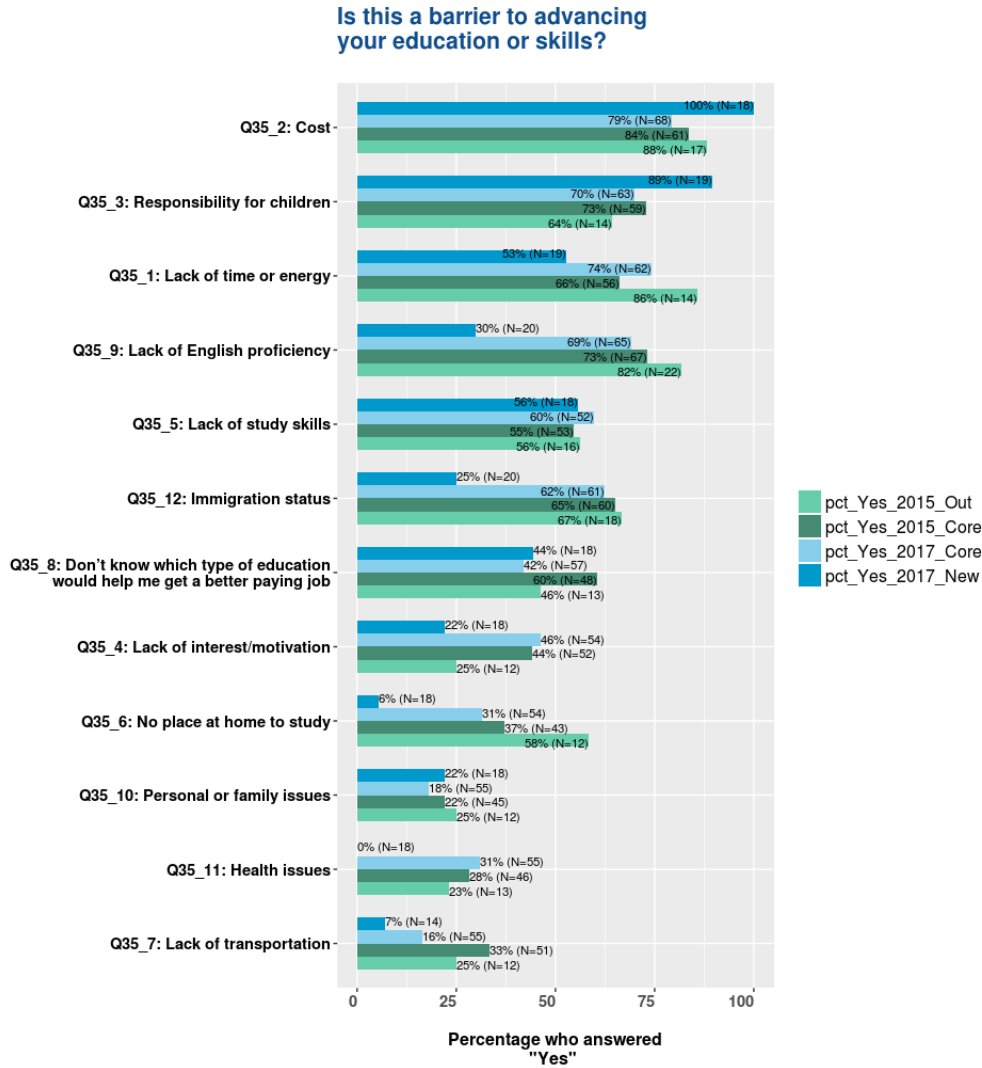
Many more newcomers report having a high-school diploma or higher *educational or vocational qualification*, which is consistent with the higher proportion among them who say their qualifications qualify them for a better paying job (see earlier section). Newcomers as well as out-movers also more often say that they plan to further advance their skills and education (Fig. 12).

Figure 12 – Education of Work-Able PH Families: 2014, 2015, 2017



There are noteworthy differences between the groups regarding barriers to more advanced education. For newcomers, most significant are costs (100%) and child care responsibilities (89%), clearly *more* often than the other groups. Newcomers mention much *less* often than the other groups: lack of time or energy, lack of English proficiency, immigration status, lack of interest and motivation, and no place to study at home. Out-movers are distinguished especially by greater frequency of not having time or energy, as well as immigration status. The continuing 2015-2017 core groups are different from both newcomers and out-movers by the larger proportion that mentions lack of interest and motivation (Fig. 13). These findings suggest that newcomer families are better qualified and keen on further improving their credentials, whereas educational progress may be more challenging among families that have lived in BHP longer, given their lower level of enthusiasm.

Figure 13 – Barriers to Advancing Education or Skills Work-Able PH Families: 2014, 2015, 2017



3.2.4. Summary Comparison

The following table presents a summary comparison of selected characteristics of newcomers, out-movers and the 2015-2017 core groups, presented in the preceding narrative. Numbers that stand out appear in a larger bold font. Full details are in Appendix C available upon request.

Table 2 – Families that moved in, moved out and stayed put: comparison of selected characteristics

	Newcomers (N=27)	Out-movers in 2015 (N=27)	Core group in 2015 (N= 88)	Core group in 2017 (N=88)
FAMILY CHARACTERISTICS				
Median age head of household	30	38	39	41
Mean number of children	1.5	1.3	1.1	1.3
Median Rent	\$670	\$621	\$591	\$836
Median Income	\$22,009	\$23,920	\$21,968	\$26,887
HOUSING				
Expecting to stay in BHP housing for 3 or more years	70%	54%	90%	89%

EMPLOYMENT				
Unemployed	4%	17%	22%	15%
Skills qualify for better paying job	48%	35%	35%	37%
BARRIERS TO EMPLOYMENT				
English proficiency	29%	75%	62%	62%
Lack of education/skills	35%	56%	69%	61%
Child care responsibilities	70%	53%	51%	40%
Immigration status	21%	53%	59%	64%
Discrimination	11%	36%	10%	16%
Domestic violence	6%	21%	8%	4%
Not knowing how to find a job	0%	23%	25%	19%
INCOME				
Income run out in the last 3 months	58%	50%	46%	40%

FOOD				
Food sources other than income	90%	36%	44%	38%
Cut/skip meal in last 3 months	60%	42%	43%	37%
Problems getting food	30%	29%	13%	4%
CHILD CARE/SUPPORT				
Child care sufficient	74%	41%	54%	55%
CCAP	43%	7%	10%	4%
TANF	19%	7%	4%	2%
EDUCATION				
Has high school or higher	73%	43%	26%	28%
Planning to advance education/skills	86%	90%	67%	54%
Cost is education barrier	100%	88%	84%	79%
Child care is education barrier	89%	64%	73%	70%

Lack of time or energy is education barrier	53%	86%	66%	74%
Lack of English proficiency is education barrier	30%	82%	73%	69%

3.3. Changes Among Individual Families in the Continuing Core Group, 2015-2017

All of the findings presented in this report so far concern results for *entire groups*. That is, they give information on: the BHP population of work-able PH families in 2014, 2015 and 2017; the continuing core group that was resident during this entire period; the newcomers; and the out-movers. These findings say nothing about how *individual families* have fared over time and how many of them progressed or regressed in specific areas. This last section of the report focuses on precisely this point. It examines how each family that participated in the 2015 survey answered the same questions in 2017. This examination of changes experienced by each family takes three forms, each presented below.

Each of the three tables that follow captures somewhat different aspects of changes in self-sufficiency levels experienced by work-able families that lived in BHP housing from 2015 through 2017 and that also completed the surveys in both years. Table 3, below, shows in Column 2 (Only Positive Changes) for each self-sufficiency domain the number of families that in 2017 indicated progress on barriers that were very or somewhat difficult for them in 2015 without that they indicated at the same time having regressed on other barriers.

Column 3 (Only Negative Changes) shows the number of families that in 2017 indicated that one or more barriers had become very or somewhat difficult for them, whereas they did not so select them in 2015 and without indicating offsetting progress on other barriers.

Column 4 shows the number of families in each domain that progressed on one or more barriers, while at the same time having regressed on one or more others.

The findings show that, overall, more families experienced positive changes than negative changes. This is particularly evident in the areas of employment and support networks.

Table 3 – Changes in Barriers that Families Reported in 2015

Self-Sufficiency Domain	Only Positive Changes	Only Negative Changes	Mix of positive and negative changes	Total N
Income	20	18	19	57
Employment	25	11	15	51
Child care	2	4	0	6
Support networks	21	11	4	36
Housing	15	12	8	35
Food	4	2	1	7
Transportation	6	5	4	15
Legal	0	2	0	2
Education	18	14	12	44

Table 4 below shows for each self-sufficiency domain changes in the *total number of barriers* that families *listed as being very or somewhat difficult in 2015 and in 2017*. This means that families may have listed a certain barrier as having been very or somewhat difficult in 2015 but they no longer did so in 2017, while in 2017 they may have reported other barriers as having become very or somewhat difficult. Positive Change, shown in Column 2, shows the number of families who in 2017 reported *fewer* barriers as being very or somewhat difficult than they did in 2015. On the other hand, Column 3 (Negative Change) shows the number of families who in 2017 reported *more* barriers as being very or somewhat difficult. Column 5 shows the number of families with no change in the number of very or somewhat difficult barriers.

The findings indicate a somewhat mixed picture. *The strongest positive change that stands out is income*, where more than three times as many families report progress (N=44) compared with those reporting a deterioration (N=14). This finding is consistent with BHP administrative data showing increases in median household income. Education is another area where positive changes are more frequent than negative changes (Table 4).

Housing, food, and transportation are areas where more barriers appear to have become very or somewhat difficult, although the numbers in the last two areas are very small (as they are for child care).

Table 4 – Households that moved in, moved out and stayed put: comparison of selected characteristics

Self-Sufficiency Domain	Positive Change	Negative Change	No Change	Total N
Income	44	14	3	61
Employment	28	29	10	67
Child care	3	7	1	11

Support networks	17	20	7	44
Housing	24	32	13	69
Food	2	11	2	15
Transportation	4	18	4	26
Legal	0	3	1	4
Education	34	28	5	67

Finally, Table 5 shows, for each domain, in Column 2 (More Positive Self-Assessment) the number of families that selected “urgent” or “vulnerable” in 2015 but chose something better in 2017. Column 3 (More Negative Self-Assessment) shows the number of families that chose something better than “vulnerable” in 2015 and regressed to either “vulnerable” or “urgent” in 2017, or regressed from “vulnerable” to “urgent.” The findings do not show major changes, in large part because not many families place themselves in the “urgent” and “vulnerable” categories. Insofar as there are changes, they tend to be positive, noticeably in the areas of immigration, legal matters, transportation and education.

Table 5 – Changes in How Work-able PH Households Assessed Their Self-Sufficiency (2015 - 2017)

Self-Sufficiency Domain	More Positive Self-Assessment	More Negative Self-Assessment	Total N
Child Care	3	2	5
Immigration	8	2	10

Education	7	2	9
Transportation	8	3	11
Legal	5	2	7
Support networks	2	1	3
Housing	5	5	10
Employment	7	6	13
Health	5	5	10
Food	3	4	7
Income	10	12	22

4. Conclusion

The report presents findings based on responses to a survey that BHP conducted in 2017 among its population of work-able PH families as well as data from its administrative files on this population. These survey results and administrative data were merged with survey results and administrative data for 2014 and 2015. The main take-aways from the 2017 findings, and comparisons with findings from earlier years, are as follows:

1. Study Population Characteristics:

- a. Response rates in this continuing study remain very high: 2014: 65%, 2015: 98%, and 2017: 90%

- b. Of the 84 families who participated in the first survey in 2014, 50 (57%) participated also in the 2015 and the 2017 survey.
 - c. Of the 87 families in the 2015-2017 continuing core group who completed the 2015 survey, 79 also completed the 2017 survey, giving a very low attrition rate of just 9% over 2 years.
 - d. Of the original population of 130 work-able families in 2014, 51 families had moved out in 2017, a turnover rate of 39.2% over 3 years.
 - e. Of the population of 115 work-able families in 2015, 27 families had moved out in 2017, a turnover rate of 23.5% over 2 years.
 - f. In a comparison of the continuing core group, out-movers, and newcomers, the families that moved in since 2015 stand out as having a markedly different profile (see below).
2. The aggregate work-able family PH population housed by BHP shows slight changes in self-sufficiency between 2014 and 2017. Generally, these changes suggest improvements that are relatively minor but fairly consistent.
 3. Survey responses of the 2014-2017 continuing core group, a subset of the total population of work-able families, also indicate slight but reasonably consistent improvements, including housing, employment, income, food, transportation, support networks, health and education.
 4. Administrative data for the 2014-2017 continuing core group show large income increases: from \$17,388 in 2014, to \$22,815 in 2015, to \$27,223 in 2017.
 5. While the improvements, just noted, are encouraging, they do not negate that in all self-sufficiency domains significant challenges remain. See caveat below.
 6. A comparison of the 2015-2017 continuing core group, out-movers and newcomers produces several noteworthy findings:
 - a. Actual moving-out largely reflects expectations about future length of residence in BHP housing stated in 2015

- b. Out-movers:
 - i. had higher incomes than families that did not move out
 - ii. Indicated more often intent to advance their education and improve their skills
 - iii. Reported more often discrimination and domestic violence as barriers to employment
 - c. Newcomers (families that moved in after 2015) clearly stand out in many ways. They:
 - i. are younger
 - ii. have fewer children
 - iii. more often comprise just 2 or 3 family members
 - iv. are much more often employed
 - v. have notably lower incomes
 - vi. more often say their skills qualify them for a better paying job
 - vii. report fewer barriers to greater employment self-sufficiency, excepting child-care responsibilities
7. Changes that families experienced between 2015 and 2017 tend to be positive. The greatest improvements were in employment, income, and support networks.

Caveat. This report has focused heavily on (1) changes since 2014 and, more so, since 2015; and (2) differences between several sub-groups of the total work-able family PH population, in particular the continuing 2015-2017 core group, the out-movers, and the newcomers. This interest in changes and differences should not, however, take away attention from conditions that have *not* changed and that remain important. Information in the graphs in this report is typically displayed in order of descending significance. Reviewing the graphs to identify major factors in relation to self-sufficiency levels in each domain should be both useful and easy.

Notes

1. Throughout this report, PH refers to Public Housing.
2. The percentages shown in graphs were calculated in each case as a proportion of the number of household heads answering a particular question (N). The number of survey participants not responding to particular questions ranges widely, with sensitive questions about legal matters having the highest non-response rates.